# EMAC ADE Staff Reference Guide

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# Introduction

The Educational Monitoring Assistance and Compliance (EMAC) application supports the monitoring of educational programs as required by state and federal programs. The authority for this enforcement can come from legal statutes, requirements for accepting funding, or through alternative agreements.

# 1. Dashboard
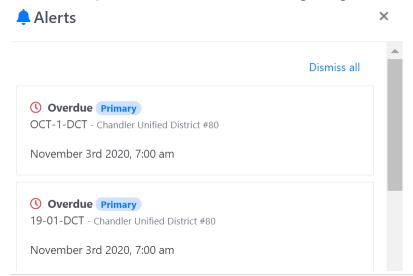
When logging into the EMAC application as a specialist or super user, the first page to appear is the dashboard page. This page summarizes the ongoing monitoring activities for each specialist and their assigned tasks.

**DASHBOARD**



## 1.1 *DASHBOARD: ALERTS*



Alerts provide a reminder to the user regarding recent task activities and communications.

🔔 **Alerts**                                                ✕

Dismiss all

🕐 **Overdue** Primary

OCT-1-DCT - Chandler Unified District #80

November 3rd 2020, 7:00 am

🕐 **Overdue** Primary

19-01-DCT - Chandler Unified District #80

November 3rd 2020, 7:00 am

## 1.2 DASHBOARD: SUMMARY LINKS

This section of the dashboard dishes a snapshot look at all of the current tasks assigned categorized by the task type and status. Select the number next to the status to view a list of these tasks.

| | | | |
|---|---|---|---|
| Data Collection - Not Started | 98 | Evaluation - Not Started | 62 |
| Data Collection - In Progress | 6 | Evaluation - In Progress | 2 |
| Data Collection - Action Required | 8 | Evaluation - Completed | 0 |
| Data Collection - Completed | 11 | Evaluation - Accepted | 6 |
| | | Evaluation - Not Accepted | 6 |

| | | | |
|---|---|---|---|
| Determination - Not Started | 34 | Onsite | 56 |
| Determination - In Progress | 0 | Overdue | 191 |
| Determination - Completed | 1 | Corrective Action | 4 |
| Determination - Accepted | 7 | | |
| Determination - Not Accepted | 0 | | |

**LIST OF TASKS NOT STARTED**

**EMAC**    Program Area ▾  Monitoring Program  Schedule Manager ▾  Communications  Schedule Views ▾

≔ Not Started

Search...

Drag a column header and drop it here to group by that column

| Monitor Program | Cycle | EdOrg | Task Name | Start Date | End Date | Task Type | Status | Onsite Visit | Actions |
|---|---|---|---|---|---|---|---|---|---|
| Highly Effective Schools | Cycle 1 | Chandler Unified District #80 (4242) | Data collection Task 1 | 07/05/2020 | 08/04/2020 | Data Collections | Not Started | No | ⋮ |
| Highly Effective Schools | Cycle 1 | GPS Global Academy (91209) | Data collection Task 1 | 07/05/2020 | 08/04/2020 | Data Collections | Not Started | No | ⋮ |
| Test1 | Cycle 2 | Alhambra Elementary District (4280) | C2-01 Review of Statement of Assurance | 08/21/2020 | 08/21/2020 | Evaluation | Not Started | No | ⋮ |
| Test1 | Cycle 2 | Alhambra Elementary District (4280) | Cycle 2 Determination | 06/15/2021 | 06/15/2021 | Determination | Not Started | No | ⋮ |

## 1.3 DASHBOARD: MY RECENT ACTIVITY
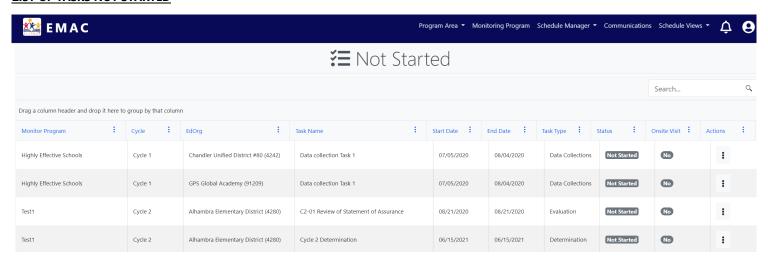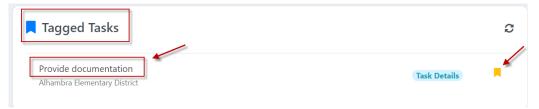
The items that you have opened or modified in the last 7, 15 or 30 days will appear on this list. Each item on the list is a link to open the item.

🕐 My Recent Activity          7 Days | 15 Days | 30 Days

| | | |
|---|---|---|
| Targeted Support and Improvement (TSI) | Monitoring Program | 10/30/2020 |
| ESEA Programmatic Monitoring | Monitoring Program | 10/30/2020 |
| Cycle 2 Determination<br>Abraham Lincoln Preparatory School: A Challenge Foundation Academy | Task | 10/30/2020 |
| C2-01 Review of Statement of Assurance<br>Abraham Lincoln Preparatory School: A Challenge Foundation Academy | Task | 10/30/2020 |
| C2-01 Statement of Assurance<br>Abraham Lincoln Preparatory School: A Challenge Foundation Academy | Task | 10/30/2020 |
| Test1 | Monitoring Program | 10/30/2020 |

## 1.4 *DASHBOARD: TAGGED TASKS*

When the user tags a task in the detail page, it will then appear on this list until you remove it. Each item on the list is a link to open the task details.

🔖 **Tagged Tasks**

Provide documentation → **Task Details** 🔖
Alhambra Elementary District

### DETAIL PAGE – TAG A TASK

**Alhambra Elementary District (4280)**

Not Started                                                                    🕐 🔖

## Provide documentation #141

| Program Area | Monitoring Program | Cycle | Fiscal Year | Task Type |
|---|---|---|---|---|
| Educator and School Excellence | Demo Monitoring Program | Cycle1 | 2021 | Data Collections |

**Assigned On:** 9/29/2020          **Last Modified On:** 9/29/2020 1:50:13 PM          **Staff Assigned:**

**IsOnsite Visit:** ✔                **Original Start Date:** 9/28/2020

**Onsite Visit Time:** 08:00 AM - 05:00 PM     **Current Start Date:** 9/28/2020          kym Dillard          Primary

**Data Collection Method:** Onsite Visit     **Original End Date:** 11/27/2020

                                            **Current End Date:** 11/27/2020

## 1.5 *DASHBOARD: TASK COMMUNICATIONS*

The last seven days of task communications will appear on this list if you are a primary or secondary staff assigned to the task. Each item on the list is a link to open the communication item.

💬 **Task Communications** Last 7 days

C0-01 Statement of Assurance - Alhambra Elementary District          📌
*By EmacTitleOne User - 09/23/2020 02:06 pm*

Testing After UAT Release

View more ›

## 1.6 *DASHBOARD: SUBMITTED TASKS*

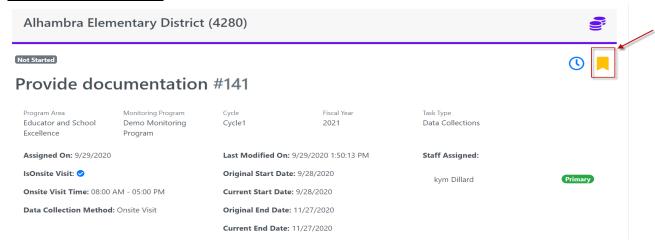When the EdOrg submits a task for ADE to review it will then appear on this list. Each item on the list is a link to open the task details.
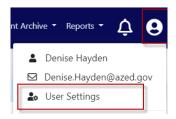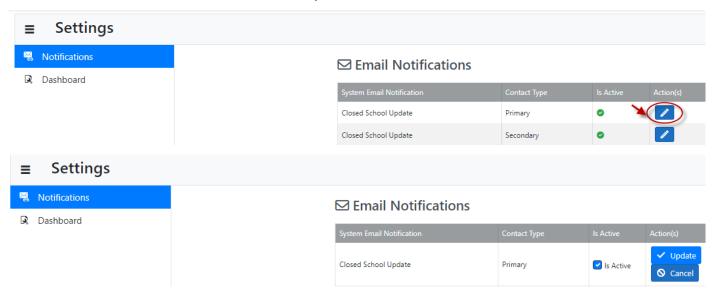
☰ **Submitted Tasks** Last 7 days

No data available in last 7 days.

View more ›

## 1.7 *DASHBOARD: USER SETTINGS*

### 1.7.1 *ADE Email Notifications and Alerts*

Select **User Circle/User Settings** on the top menu bar. This will only apply to the active user (not a global setting).



Use the edit button in the actions column to turn your ADE email notifications and alerts on/off.
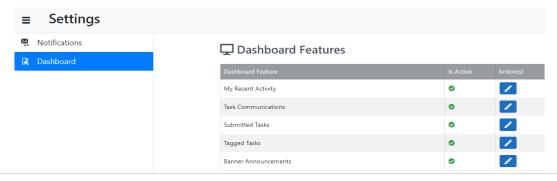




If there is a  next to the notification, the setting has been turned off by your program area.



### 1.7.2 *Dashboard Features*

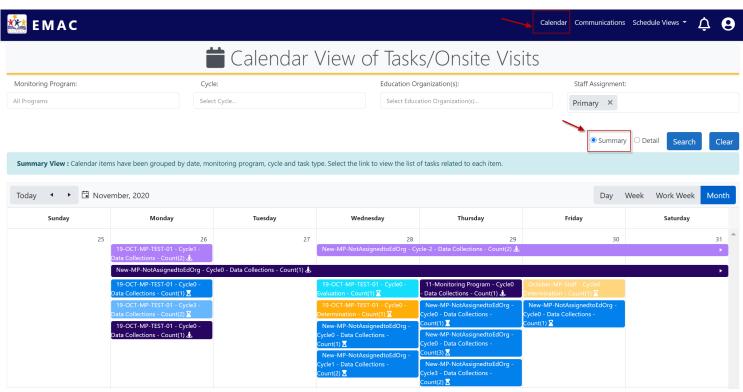Modify your dashboard view by turning on/off dashboard features.

# 2. Calendar

For the tasks assigned to each specialist, the calendar will show these tasks on the task start date.  There are two calendar page views, Summary and Detail.
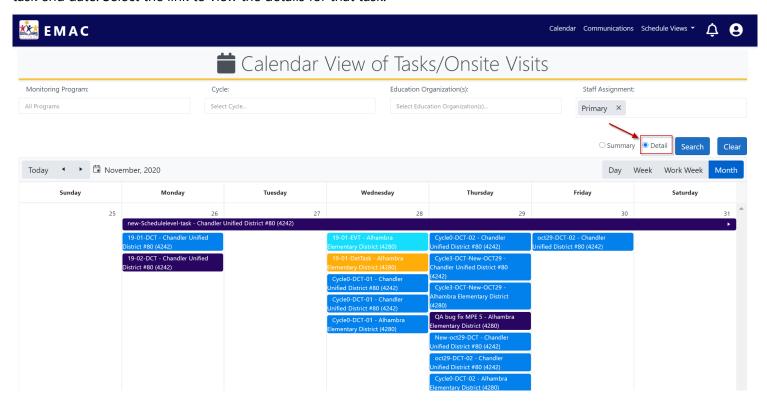
**SUMMARY CALENDAR PAGE**

The summary view consolidates the tasks by cycle. Select the link to view the list of tasks.

## DETAIL CALENDAR PAGE

The Detail view displays each task assigned to you.  The calendar will show the task on the task start date and on the task end date. Select the link to view the details for that task.
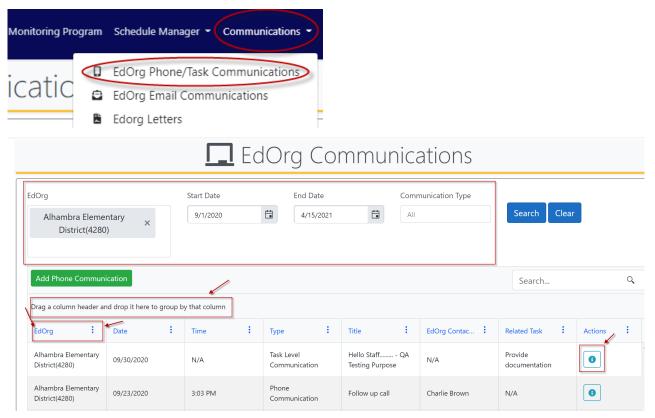
# 3. Communications

This is a view of the EMAC communications for each EdOrg.



## 3.1 EDORG PHONE/TASK COMMUNICATION

View a list of EdOrg phone and task communications by selecting **Communications/EdOrg Phone/Task Communications** from the top menu bar.



**Filters:**

> **EdOrg:** Select one or more EdOrgs to view the task and phone communications.

> **Start Date:** Select the date the communication search should start based on the date of the communication.

> **End Date:** Select the date the communication search should end based on the date of the communication.

> **Communication Type:** Select **Task**, **Phone** or **all** to filter the type of communication to view in the grid.

*CONTINUED: EDORG PHONE/TASK COMMUNICATION*

**Grid Features:** All communication views have features available to manipulate the grid view results.

**Drag and Drop:** Drag a column heading to the grid bar to group items in the grid.
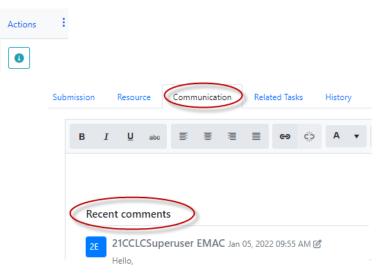
**Collapse All:** Collapse the grouped data to view groupings.

**Expand All:** Expand the grouped data to view all details.

**Search:** Enter Search criteria for any text field in the grid.

**Actions:** View the details of the communication. To view the details of the communication, select the details button under the **actions** column.
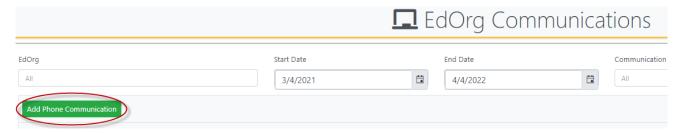
**TASK COMMUNICATION**

To view the details of the communication, select the details button under the **actions** column on the EdOrg Communications grid.
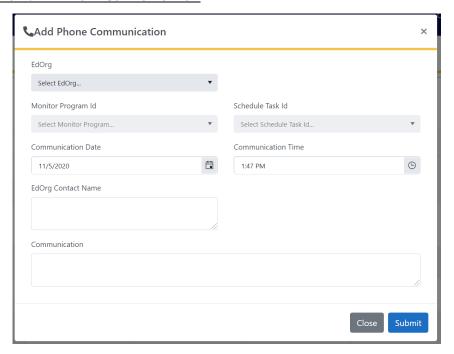


## 3.1.1 Add Phone Communication

If there is a phone communication that occurs with the EdOrg regarding the monitoring program, this can be documented here. Select the 'Add Phone Communication' button and complete the page below. These phone communications will be listed in the communication grid view as a phone communication **type**.
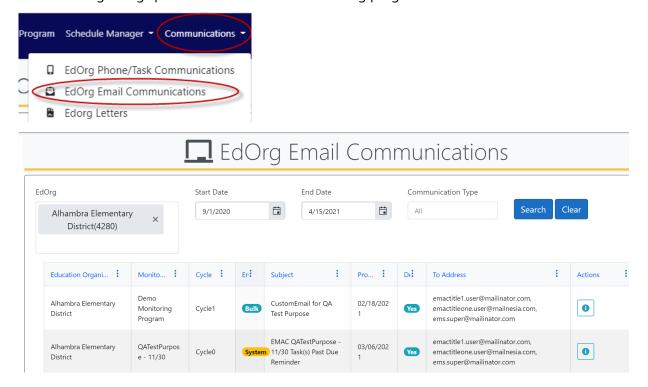
## 3.2 EDORG EMAIL COMMUNICATIONS

View a list of EdOrg email communications.  There are two types of email communications: bulk and system.  Bulk emails are one-time emails sent to a specific distribution list of EdOrgs.  The systematic email notifications are sent as reminders regarding specific tasks within the monitoring program.
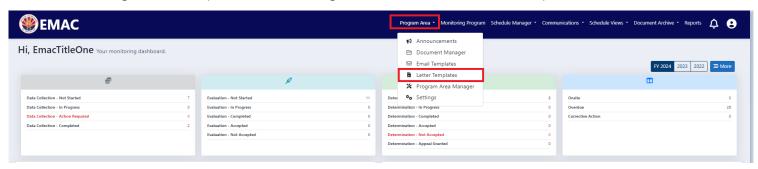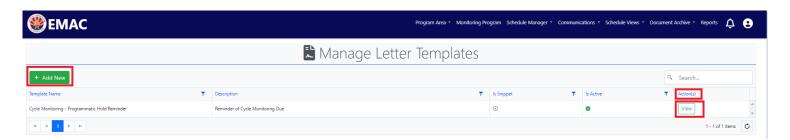
## 3.3 *EDORG LETTER COMMUNICATIONS*

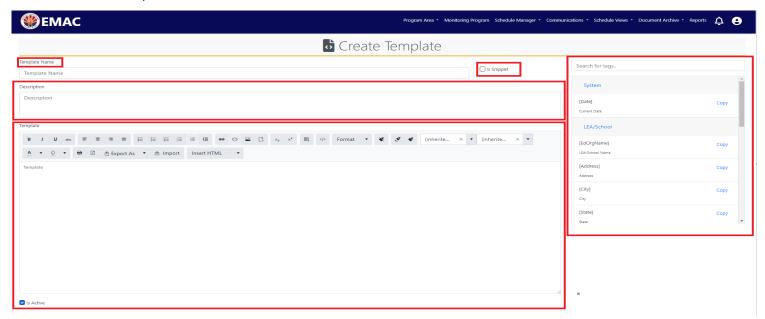### 3.3.1 *Create/Manage Letter Template*

To create or Manage Letter Templates, Click on "Program Area" and Select "Letter Templates"



User can Edit or View existing template by clicking on "View" Action or User can create a new Letter Template by clicking on "Add New" Button.



To create a New Template user can add below information.

1. Template Name: Name of the Template.

2. Description: Template Description.

3. Template Body: User can add all the images, text, and format according to the letter requirements.

4. Is Snippet: By selecting "Is Snippet" user can insert this template in other templates by selecting "Insert HTML" dropdown.

5, Tags: User can add following categories of tags. System, LEA/School or Monitoring Cycle, by using these tags system will dynamically replace data in the template according to the selected tag.
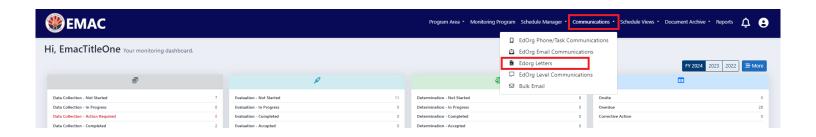
Once all the template information is entered, user can click on "Save" to create the template.

Note: IsActive flag should be checked in order to use the template in Letter Communications.
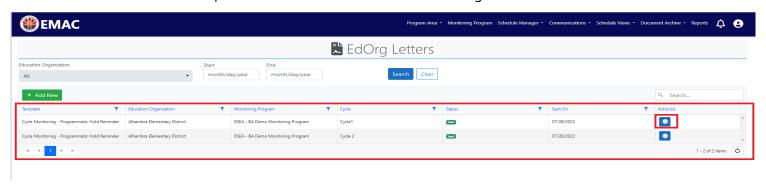


## 3.3.2 Letter Communications
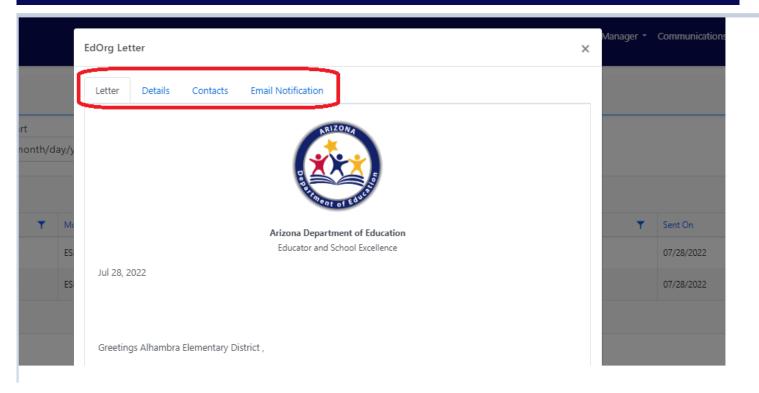
Once template is created, User can click on "Communications" dropdown and "EdOrg Letters" to send/view/manage letter communications to LEA/Education Organizations.
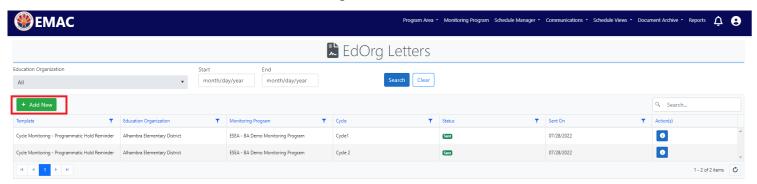


EdOrg Letter page appears with a grid view of all the previously sent EdOrg Letters and the Status. User can also click on "Information" action to view complete information about the selected EdOrg Letter Communication.
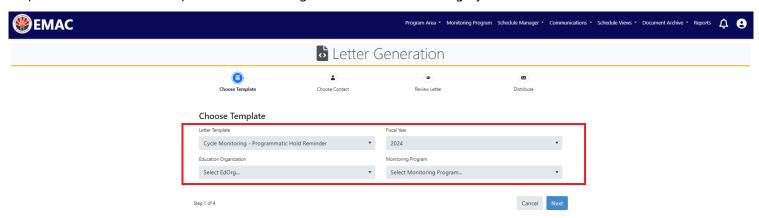
To send a new Letter Communication to Education Organization, Click on "Add New".
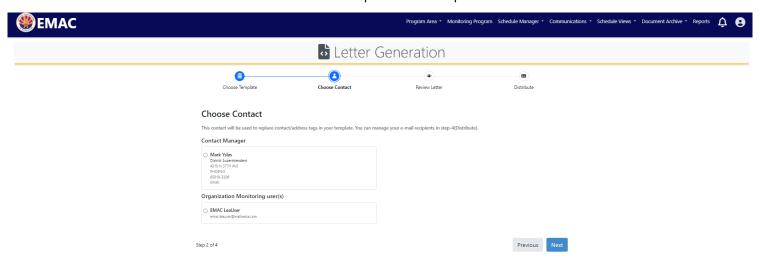


Step1: Select the Letter Template, Education Organization and Monitoring Cycle.
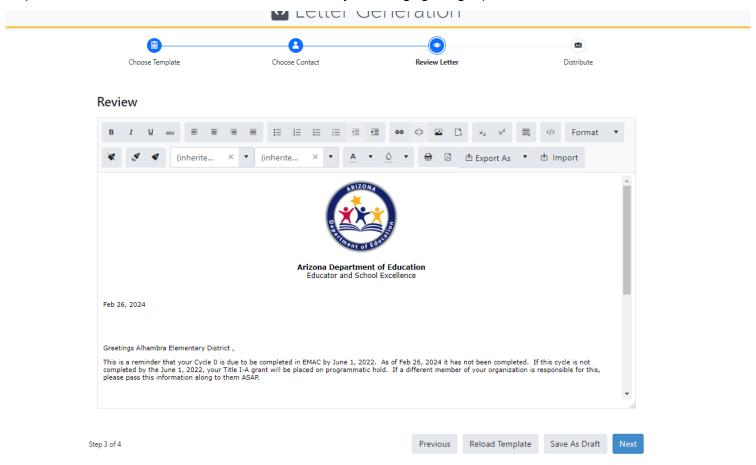
Step 2: Select all the available contacts related to the Education Organization.

Note: User would also be able to add new contacts to recipient list in step 3.
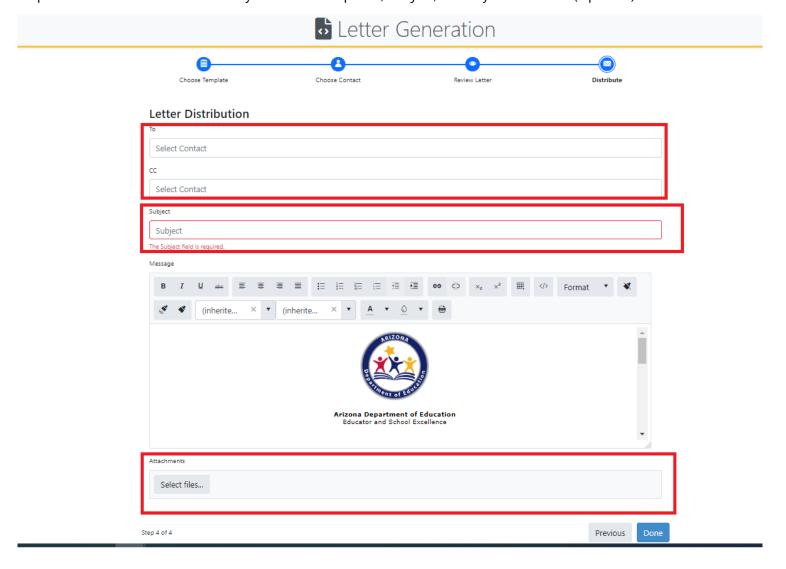


Step 3: Review the letter. User will also be look at the dynamic tags getting replaced with a value.
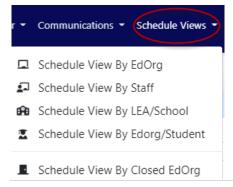
Step 4: User would be able to add any additional recipients, Subject, and any attachments (Optional).



## 4. Schedule Views

Monitoring program schedule views can be used to view all tasks assigned in the monitoring program schedules.

> See *Appendix D* on how to use the schedule view grid features.
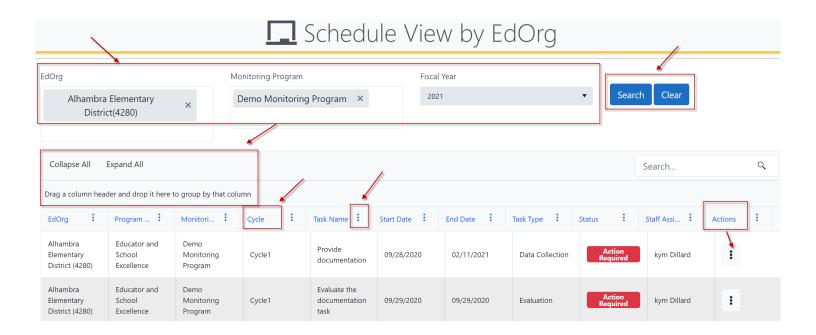
## 4.1 *SCHEDULE VIEW BY EDORG*

Select the **Schedule View/Schedule View By EdOrg** on the menu bar at the top of the page to manage the EdOrg assigned tasks.

**Schedule View Filters:** At the top of the page, each view has different cascading filters to select data to be viewed. Enter the filter criteria and then press the *Select button* to view the monitoring program tasks. All task types will appear in the view based on the filter criteria selected. The *Clear Button* will clear all filter selections and the search results.

### Schedule View by EdOrg

| EdOrg | Program ... | Monitori... | Cycle | Task Name | Start Date | End Date | Task Type | Status | Staff Assi... | Actions |
|-------|-------------|-------------|-------|-----------|------------|----------|-----------|--------|---------------|---------|
| Alhambra Elementary District (4280) | Educator and School Excellence | Demo Monitoring Program | Cycle1 | Provide documentation | 09/28/2020 | 02/11/2021 | Data Collection | **Action Required** | kym Dillard | ⋮ |
| Alhambra Elementary District (4280) | Educator and School Excellence | Demo Monitoring Program | Cycle1 | Evaluate the documentation task | 09/29/2020 | 09/29/2020 | Evaluation | **Action Required** | kym Dillard | ⋮ |

Collapse All   Expand All

Drag a column header and drop it here to group by that column

## 4.2 SCHEDULE VIEW BY STAFF

This view is available to ADE Staff to view all the tasks assigned to a specific staff member.

**SCHEDULE VIEW BY STAFF**
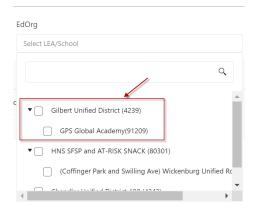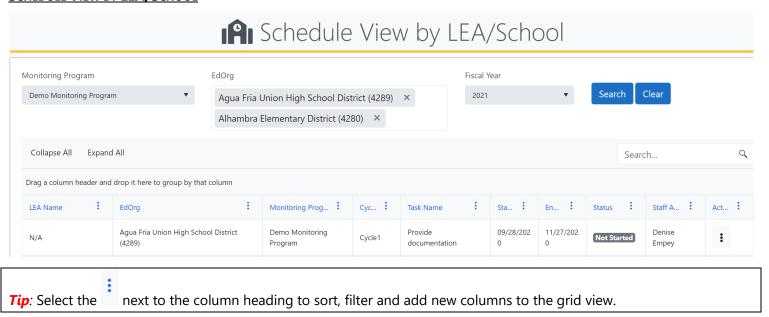
## 4.3 *SCHEDULE VIEW BY LEA/STAFF*

This view is available to ADE Staff to view all the tasks assigned to a LEA or school. The EdOrg filter lists the schools under the district that have been assigned to the selected monitoring program.

**EDORG FILTER**



**SCHEDULE VIEW BY LEA/SCHOOL**



*Tip*: Select the ⋮ next to the column heading to sort, filter and add new columns to the grid view.

## 4.4 *SCHEDULE VIEW BY EDORG/STUDENT*
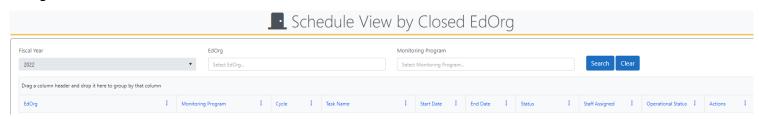
Select the **Schedule View/Schedule View By EdOrg/Student** on the menu bar at the top of the page to manage the EdOrg list of students selected for monitoring.

*See Appendix C*

## 4.5 *SCHEDULE VIEW BY CLOSED EDORG*
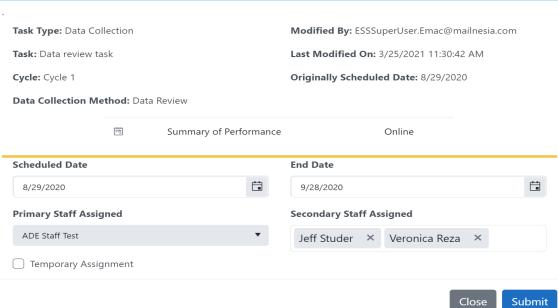
Select the **Schedule View/Schedule View By Closed EdOrg** on the menu bar at the top of the page to view closed EdOrg tasks.



## 4.6 *EDITING A TASK FROM THE SCHEDULE VIEW*

The staff member will be able to edit the tasks within the monitoring program by selecting the edit button next to the task. Dates can be changed if the task status is 'Not Started'.

#### EDIT A TASK



**Schedule Task**

`

**Task Type:** Data Collection                     **Modified By:** ESSSuperUser.Emac@mailnesia.com

**Task:** Data review task                         **Last Modified On:** 3/25/2021 11:30:42 AM

**Cycle:** Cycle 1                                 **Originally Scheduled Date:** 8/29/2020

**Data Collection Method:** Data Review

Summary of Performance                             Online

**Scheduled Date**                                 **End Date**

8/29/2020                                          9/28/2020

**Primary Staff Assigned**                         **Secondary Staff Assigned**

ADE Staff Test                                     Jeff Studer ✕   Veronica Reza ✕

☐ Temporary Assignment

Close    Submit

*DATA SUBMISSION FROM THE SCHEDULE VIEW*

The staff member will be able to review forms and documents submitted by the EdOrg.

**DATA SUBMISSION – DATA COLLECTION TASK**

**Alhambra Elementary District (4280)**

Completed

# Cycle 0-02 Needs Assessments #13

| Program Area | Monitoring Program | Cycle | Fiscal Year | Task Type |
|---|---|---|---|---|
| Educator and School Excellence | ESEA Programmatic Monitoring | Cycle 0 | 2021 | Data Collection |

**Assigned On:** 6/12/2020

**IsOnsite Visit:** ⊗

**Data Collection Method:** Desktop Review

**Last Modified On:** 6/12/2020 2:22:02 PM

**Original Start Date:** 7/28/2020

**Current Start Date:** 7/28/2020

**Original End Date:** 10/26/2020

**Current End Date:** 10/26/2020

**Staff Assigned:**

kym Dillard        Primary

## Purpose

Cycle 0-02 Needs Assessments

---

Submission    Resource    Communication    Related Tasks

## Online Forms

| | C0-02 Procedures for LEA Integrated Action Plan (LIAP) | | Completed ⓘ |

## Evidence Documents

Not Available

## Evidence Documents Uploaded

Not Available

**Reject Reason:**

**End Date:**

[ Reject ]

## DATA SUBMISSION – EVALUATION TASK

`Not Started`

# Cycle 0-02 Needs Assessments Review #15

**Evaluation For:** Cycle 0-02 Needs Assessments

| Program Area | Monitoring Program | Cycle | Fiscal Year | Task Type |
|---|---|---|---|---|
| Educator and School Excellence | ESEA Programmatic Monitoring | Cycle 0 | 2021 | Evaluation |

**Assigned On:** 6/12/2020

**Last Modified On:** 6/12/2020 1:53:57 PM

**Staff Assigned:**

**IsOnsite Visit:** ⊗

**Original Start Date:** 9/30/2020

kym Dillard  `Primary`

**Current Start Date:** 9/30/2020

**Original End Date:** 9/30/2020

**Current End Date:** 9/30/2020

## Purpose

Review cycle 0

| Evaluation | Submission | Resource | Related Tasks |

**Status:** Not Started ▼

**Notes:**

[ Submit ]

**Related Tasks Tab:** The task details and data submission pages contain the list of linked and related tasks. Each item is a hyperlink that opens that linked detail page.

## LINKED AND RELATED TASKS

| Evaluation | Submission | Resource | Related Tasks |

## Linked Tasks

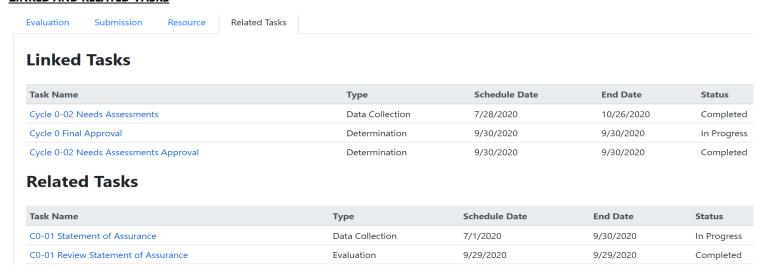| Task Name | Type | Schedule Date | End Date | Status |
|---|---|---|---|---|
| Cycle 0-02 Needs Assessments | Data Collection | 7/28/2020 | 10/26/2020 | Completed |
| Cycle 0 Final Approval | Determination | 9/30/2020 | 9/30/2020 | In Progress |
| Cycle 0-02 Needs Assessments Approval | Determination | 9/30/2020 | 9/30/2020 | Completed |

## Related Tasks

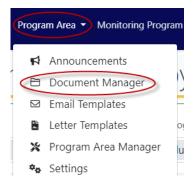| Task Name | Type | Schedule Date | End Date | Status |
|---|---|---|---|---|
| C0-01 Statement of Assurance | Data Collection | 7/1/2020 | 9/30/2020 | In Progress |
| C0-01 Review Statement of Assurance | Evaluation | 9/29/2020 | 9/29/2020 | Completed |

# 5. Monitoring Program Preparation – Super User Only

In the EMAC application, it is important to ensure all the online forms and resource documents have been input into the EMAC application prior to creating your monitoring program. Make sure that you have identified the specialties and staff to be assigned to a specific monitoring program task. Turn on any systematic notifications for your program area.

## 5.1 DOCUMENT MANAGER
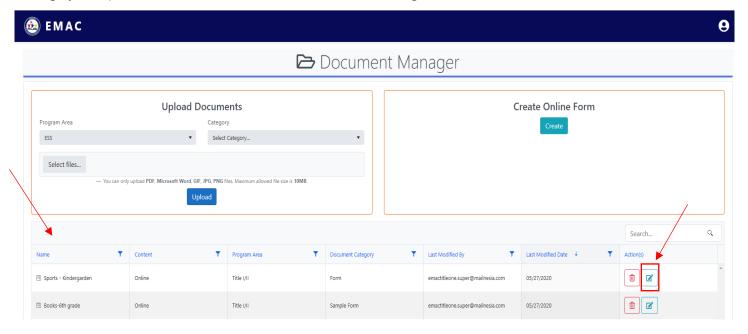
Upload, download and delete resource documents to be used as supporting information in a monitoring program. Create, edit and delete online forms to collect information required to comply with the monitoring program.

**UPLOAD RESOURCE DOCUMENTS AND CREATE ONLINE FORMS**



Manage your uploaded documents and saved forms in the data grid below. Select the [edit icon] to edit a saved form.
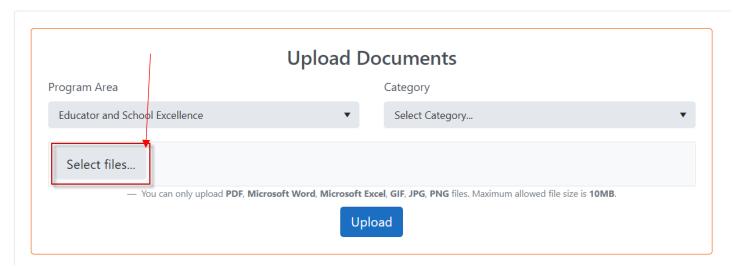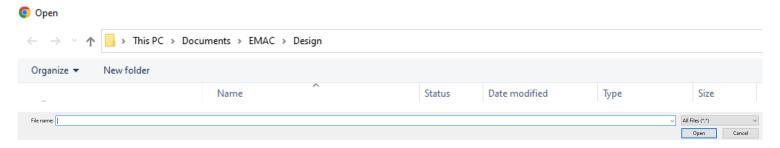
## 5.1.1 *UPLOAD A DOCUMENT*

If you have resources or sample letters to share with the EdOrgs use the **Upload Documents** section to upload the documents in EMAC. These documents will become available to attach to the monitoring tasks.

To view a list of documents see Appendix E.

**UPLOAD RESOURCE DOCUMENTS**



Select files to upload from file manager.



Uploaded Documents and online forms appear in the Document Manager Grid.

| Name ↑ | Content | Program Area | Category | MPCount | Responded Entity Co... | Effective Start ... | Effective End D... | Action(s) |
|---|---|---|---|---|---|---|---|---|
| _A. Title III Compliance Document | Online | Office of English Language Acquisition Services | Form | 14 | 2 | 09/21/2020 | | ⋮ |
| _A.Endorsement/ Training for Teachers of English Learners | Online | Office of English Language Acquisition Services | Form | 13 | 2 | 09/21/2020 | | ⋮ |
| 2020-2021 Statement of Assurance.pdf | PDF | Office of English Language Acquisition Services | Resource | 2 | N/A | 11/05/2020 | | ⋮ |

## 5.1.2 *CREATE AN ONLINE FORM*

Select the create button to create an online form in form builder. These forms can be attached to tasks within a monitoring program to collect monitoring information.
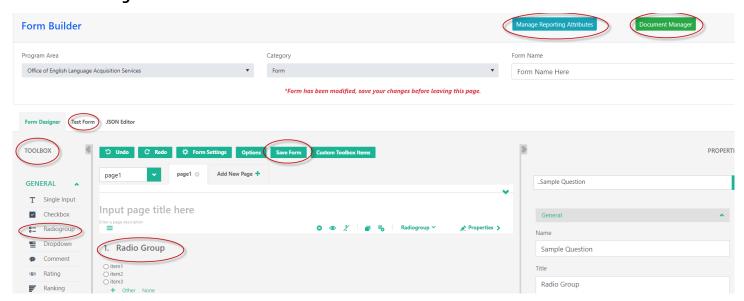
**CREATE A FORM WITH FORM BUILDER**



**FORM BUILDER**

Select a question from the toolbox on the left-hand side of the page. Drag and drop it on the form.  Examples of each question type are provided in Appendix A.
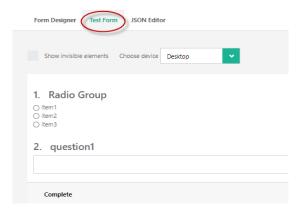
Save the form by selecting 'Save Form' button. To exit the Form Builder, save your form and then select the **Document Manager** button.
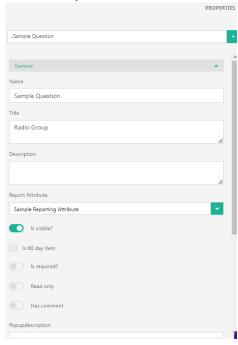
### TEST FORM IN FORM BUILDER

Select the **Test Form** tab to view the online version of the form.



### FORM BUILDER PROPERTIES

Select the question on the form and then customize the results by using the options under **properties**.
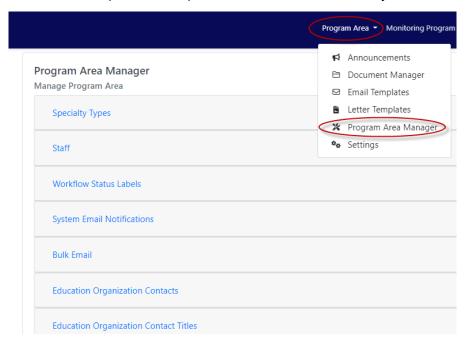


*Tip:* Make sure you select **Is Visible** to ensure that the question appears on your form. The ADE logo is available to attach to any form.

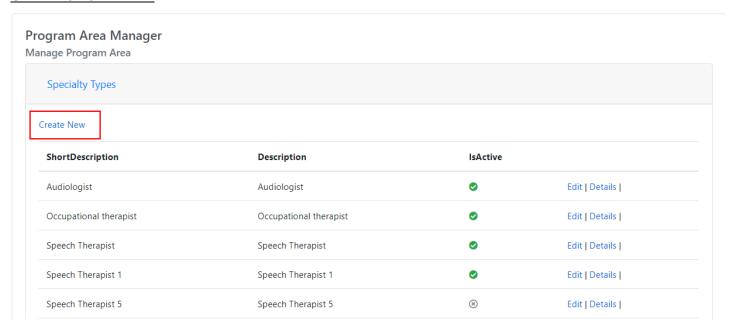*PROGRAM AREA MANAGER*

Use this menu option to setup and maintain information for your monitoring programs.



## 5.1.3 *SPECIALTY TYPES (OPTIONAL)*

Specialty types can be assigned to a particular staff member and task.
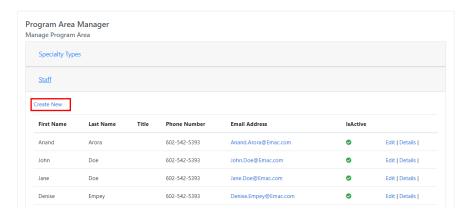
**CREATE A SPECIALTY TYPE**

## 5.1.4 STAFF
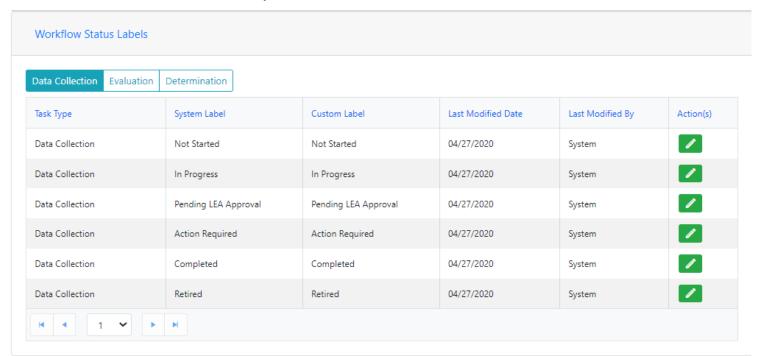Add each staff member here to be used when assigning a staff member to manage the monitoring program tasks.

**CREATE A STAFF PROFILE**

**Program Area Manager**
Manage Program Area

Specialty Types

Staff

Create New

| First Name | Last Name | Title | Phone Number | Email Address | IsActive | |
|---|---|---|---|---|---|---|
| Anand | Arora | | 602-542-5393 | Anand.Arora@Emac.com | ● | Edit \| Details \| |
| John | Doe | | 602-542-5393 | John.Doe@Emac.com | ● | Edit \| Details \| |
| Jane | Doe | | 602-542-5393 | Jane.Doe@Emac.com | ● | Edit \| Details \| |
| Denise | Empey | | 602-542-5393 | Denise.Empey@Emac.com | ● | Edit \| Details \| |

## 5.1.5 WORKFLOW STATUS LABELS (OPTIONAL)
Customize the workflow status label. Select the Task Type (**Data Collection, Evaluation,** or **Determination**) to view the system label.

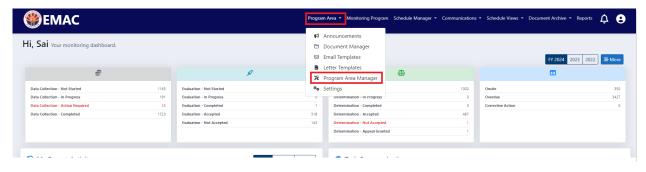Select the [✏] button next to the status you would like to customize.

**Workflow Status Labels**

Data Collection | Evaluation | Determination

| Task Type | System Label | Custom Label | Last Modified Date | Last Modified By | Action(s) |
|---|---|---|---|---|---|
| Data Collection | Not Started | Not Started | 04/27/2020 | System | ✏ |
| Data Collection | In Progress | In Progress | 04/27/2020 | System | ✏ |
| Data Collection | Pending LEA Approval | Pending LEA Approval | 04/27/2020 | System | ✏ |
| Data Collection | Action Required | Action Required | 04/27/2020 | System | ✏ |
| Data Collection | Completed | Completed | 04/27/2020 | System | ✏ |
| Data Collection | Retired | Retired | 04/27/2020 | System | ✏ |

|◄ ◄ 1 ▼ ► ►|

Edit the custom label and select the [✓ Update] button.

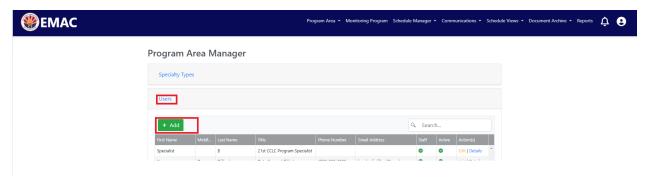| Task Type | System Label | Custom Label | Last Modified Date | Last Modified By | Action(s) |
|---|---|---|---|---|---|
| Data Collection | Not Started | Not Started | 04/27/2020 | System | ✓ Update  ⊘ Cancel |

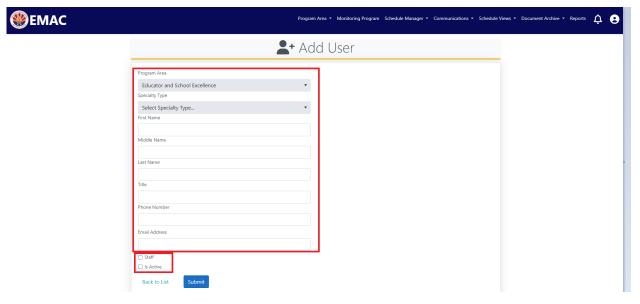## 5.1.5 *MANUALLY ADD EXISTING USERS TO GRANT PROGRAM AREA ACCESS IN EMAC*

**Step 1:** Click on "Program Area" dropdown and Select "Program Area Manager".
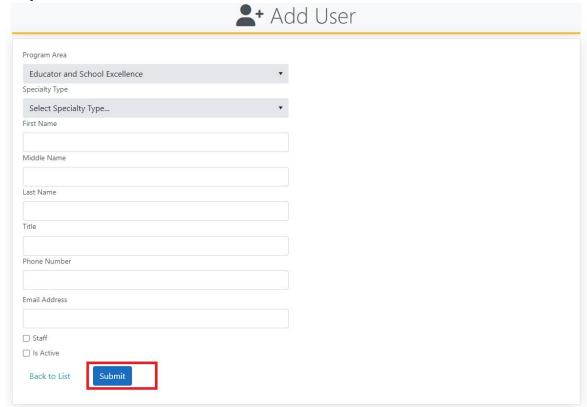


**Step 2:** Under "Users" tab, click on "Add" button.



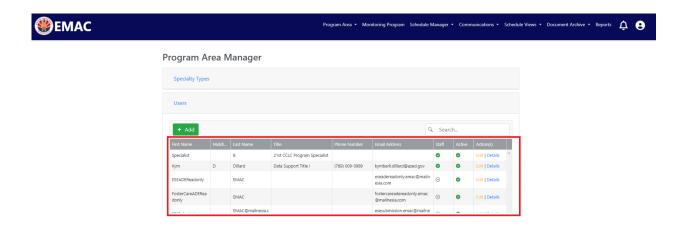**Step 3:** Fill in the User Details. Note: Check "IsActive" Flag.

**Step 4:** Click on "Submit" button.



**Step 5:** Validate user is showing up in the Users List.

## 5.2 *SYSTEM EMAIL NOTIFICATIONS*

The system email notifications can be managed on this page. Update the system email content by selecting the hyperlink under the **Email Template** column. [Click here](#) for details on how to turn notifications on/off.

**Actions** column: Select the **Edit** to change the notice day. Select **Preview** to view a sample of the email.

### System Email Notifications

ⓘ To Enable/Disable these external emails please **click here** and navigate to Notifications section.

| System Email Notification | Notice Day | Email Template | Actions(s) |
|---|---|---|---|
| Tasks Coming Due | 5 | Task Coming Due | Edit    Preview |
| Overdue Tasks<br>Notification-Interval: Notice Day, 2xNotice Day, 3xNotice Day | 5 | Overdue Tasks | Edit    Preview |
| Monitoring Program Assignment for the FY | 0 | MP Assignment | Edit    Preview |
| Evaluation Accepted | 0 | Eval Accepted | Edit    Preview |
| Evaluation In Progress | 0 | Eval In Progress | Edit    Preview |
| Evaluation Not Accepted | 0 | Eval Not Accepted | Edit    Preview |
| Data Collection Task Rejected | 0 | Data Collection Not Accepted | Edit    Preview |

#### EDIT EMAIL CONFIGURATION
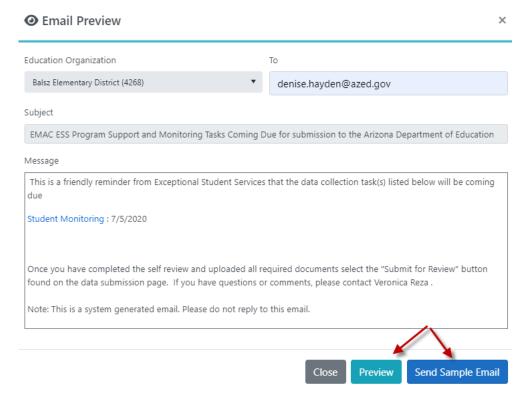
**Notice Day** is the number of days the used to determine when the notification will be sent. For the **Task Coming Due** email example below, the system will send the email **5** days prior to the end date of the task.

## Edit
### SystemEmailNotification

Notice day

| 5 |

Email Template

| Task Coming Due ▼ |

**Save**

Back to List

#### PREVIEW EMAIL

Select the **Education Organization** and enter your email address in the **To** field to preview a sample of the email to send**.**



### SAMPLE EMAIL

## 5.3 BULK EMAIL NOTIFICATIONS

Bulk Email allows you to send a communication to one or more EdOrgs in your monitoring program and saves the communication under the **Communications** menu option.

**STEPS TO SEND A BULK EMAIL:**
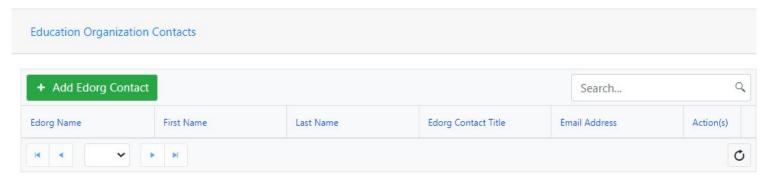
1. Select **Program Area/Email Templates** to create a template for your communication.
2. Select **Program Area/Program Area Manager/Bulk Email**
3. Select **Email Template**, **Monitoring Program, Cycle, EdOrg Role,** and **EdOrg Name.**
4. Select the **Send** button to send the communication.
5. Go to **Communications/EdOrg Email Communications** on the top menu bar to view the email.

Bulk Email

## Email Template

Email Template | Test ▼ | View/Edit Template

— If you cannot find a custom template in the list provided above, click here to add your custom template.

## Email Distribution Filter

Fiscal Year | 2022 ▼

Monitoring Programs | ESS monitoring program - IT DEMO ▼

Cycle | Cycle 1 ▼

EdOrg Role | School District ✕

EdOrg Name | Chandler Unified District #80(4242) ✕

Send    Cancel

## 5.4 EDUCATION ORGANIZATION CONTACTS

Add Contacts here to use in the EdOrg Letter creation. The list of contacts listed here will be available to add to the formal EdOrg letter as a letter recipient.

Education Organization Contacts

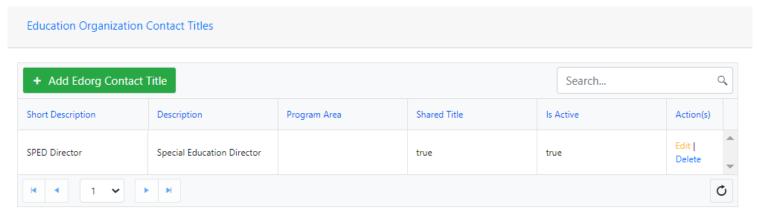| + Add Edorg Contact | | | | Search... | |
|---|---|---|---|---|---|
| Edorg Name | First Name | Last Name | Edorg Contact Title | Email Address | Action(s) |
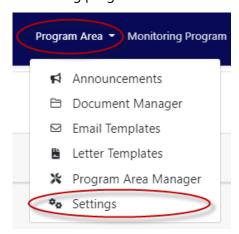
## 5.5 EDUCATION ORGANIZATION CONTACT TITLES

Add or update the contact titles to use when creating EdOrg contacts.

Education Organization Contact Titles

| + Add Edorg Contact Title | | | | Search... | | |
|---|---|---|---|---|---|---|
| Short Description | Description | Program Area | Shared Title | Is Active | Action(s) |
| SPED Director | Special Education Director | | true | true | Edit \| Delete |

## 5.6 PROGRAM AREA SETTINGS

Select **Program Area/Settings** to configure user access, email notifications and alerts for all of your ADE specialists and/or super users in your program area. This will also control systematic email notifications to EdOrgs in your monitoring programs.

Program Area ▾ Monitoring Program

- 📢 Announcements
- 🗀 Document Manager
- ✉ Email Templates
- 📄 Letter Templates
- ✕ Program Area Manager
- ⚙ Settings

## 5.6.1 *SPECIALIST ACCESS*

This page will allow the super user to change the specialist access to edit capabilities, data submissions and access to edorg user assignments.

**SPECIALIST CONFIG**



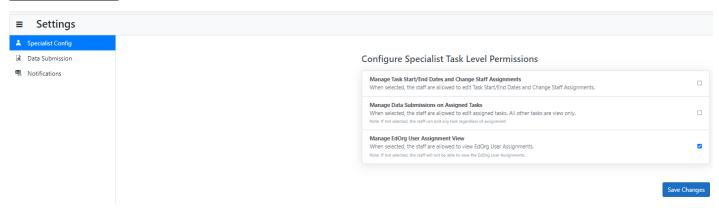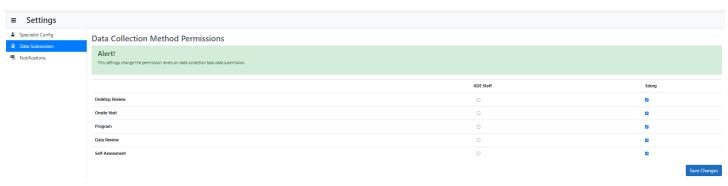## 5.6.2 *ACCESS TO SUBMIT DATA*

This page will allow the specialist to submit data on a data collection task on behalf of the EdOrg.

**DATA SUBMISSION**
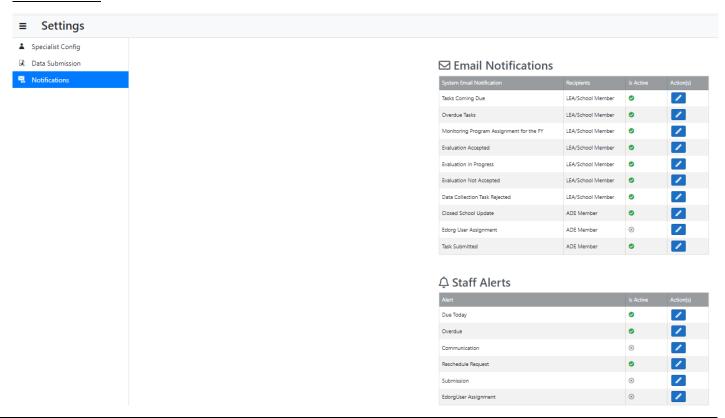
## 5.6.3 *NOTIFICATIONS AND ALERTS*

This page will allow the super user to turn EdOrg and staff notifications and alerts on/off by <u>program area</u>.  The **Recipients** column indicates the EMAC users that will receive the notification.  For the LEA/School users, this notification will only be sent to EMAC users that have been assigned to the specific monitoring program/cycle.

To turn off a notification, select the pencil icon next to the email notification, then uncheck the **Is Active** checkbox.

<u>**NOTIFICATIONS**</u>

---

*Tips:*

*#1:* Review/update the email verbiage for each notification by selecting **program area/email templates** on the menu bar at the top of the page**.**

*#2:* If these are turned off, no one will receive the notification in your program area.  Refer to staff dashboard settings to turn off your individual notifications.

---

# 6. Monitoring Program Setup
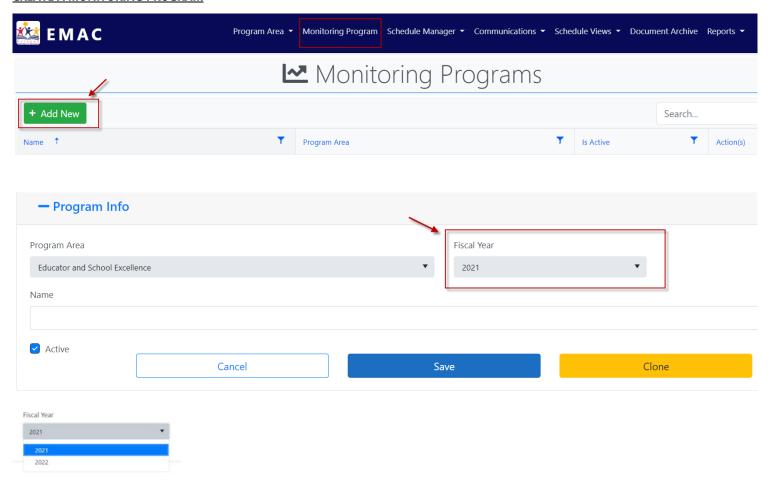
Create or update the monitoring programs, cycles and related tasks. Select the Monitoring Program menu option on the menu bar to maintain the monitoring programs.

## 6.1 MONITORING PROGRAM CREATION

**Add New Button:** Select the 'Add New' button to add a new a monitoring program.

**Fiscal Year:** Fiscal Year of the monitoring program. Select the fiscal year the monitoring program will be executed. Current fiscal year and next fiscal year will be available in the dropdown.

**CREATE A MONITORING PROGRAM**

## 6.2 MONITORING PROGRAM CONFIGURATION

**Education Organization(s):** Select one or more Education Organization (EdOrg) categories. The schools, districts and other organizations included in these roles are made available when assigning the monitoring program.

**District and School Configuration:** By selecting any of these options on the monitoring program, it will allow the district different levels of oversight of the school monitoring program submissions.

> ***Allow District to Access:*** By selecting this option, the district will have access to view their school monitoring program tasks and submissions.
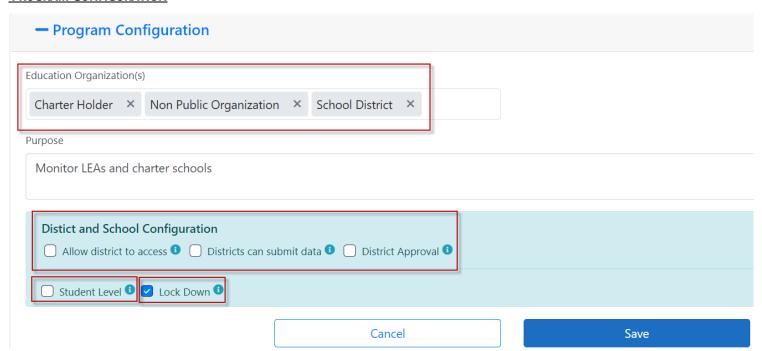
> ***Districts Can Submit Data:*** By selecting this option, the district and the school will have access to submit data for the school tasks. The district can decide whether or not the schools can submit the data based on permissions.

> ***District Approval:*** By selecting this option, the district will be required to approve the school submissions prior to the ADE specialist review.

**Student Level:** By selecting this option on the monitoring program, it will allow the education organizations to submit data by student ID and DOB.

**Lockdown:** By selecting this option on the monitoring program, an option will be turned on the data collection task level to systematically lock a task.

 **PROGRAM CONFIGURATION**

## 6.3 *EDIT A MONITORING PROGRAM*

Select the edit button next to the monitoring program to edit. Select the
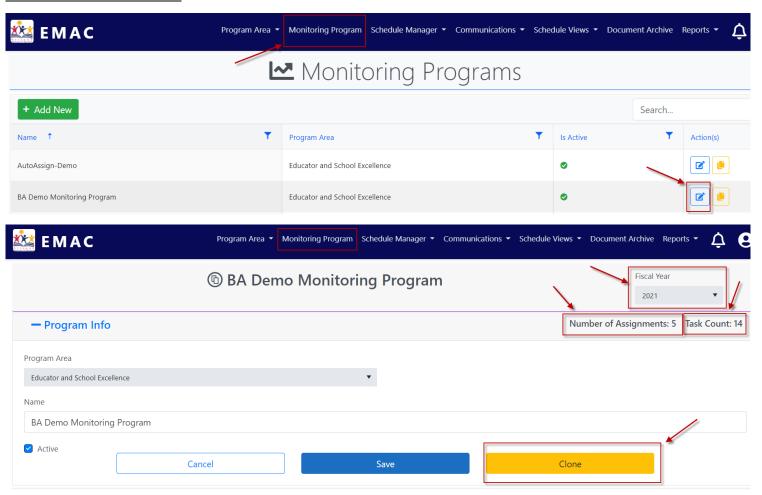
**Fiscal Year:** Select the Fiscal Year of the monitoring program to edit. This dropdown list will include all versions of the monitoring program executed in production.

**Number of Assignments:** Number of Education Organizations that have been assigned to the monitoring program. Changes to the monitoring program are limited once the monitoring program has been assigned to one or more Education Organizations. If changes are needed to a task in the middle of a monitoring cycle, consider cloning and retiring the current task so that changes can be made to the newly created task.

**Task Count:** Number of tasks included in the monitoring program.
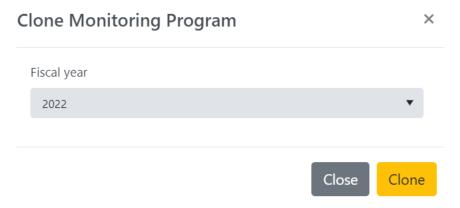
**Clone:** Select edit next to the monitoring program you would like to clone. Select the Clone button in the current monitoring program. Select the fiscal year that you would like the new monitoring program to be applied. Use this feature to connect this monitoring program with previous versions for historical reporting.

<u>**EDIT A MONITORING PROGRAM**</u>

**CLONE A MONITORING PROGRAM**

## Clone Monitoring Program ✕

Fiscal year

2022 ▼

Close    Clone
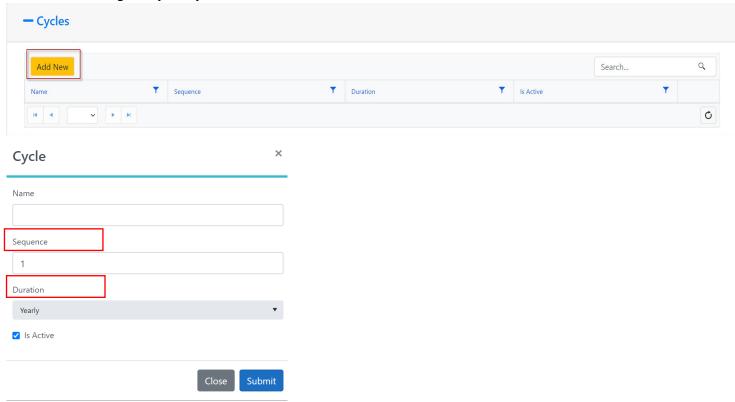
## 6.4 MONITORING CYCLE

Create your monitoring program cycles.  The monitoring tasks will be associated to a specific cycle within the monitoring program.  EdOrgs will be assigned tasks by cycle.

**Sequence:** Identify the order in which you would like the cycles to be executed based on your monitoring program.

**Duration**: The length of your cycle.

**─ Cycles**

Add New                                                    Search...  🔍

| Name | ▼ | Sequence | ▼ | Duration | ▼ | Is Active | ▼ | |
|------|---|----------|---|----------|---|-----------|---|---|

|◄  ◄  [   ▼]  ►  ►|                                              ↻

## Cycle                    ✕

Name

[                                      ]

Sequence

[1                                     ]

Duration

[Yearly                              ▼]

☑ Is Active

Close    Submit

## 6.5 *DATA COLLECTION TASKS*

One or more data collection tasks can be created under a monitoring program cycle. These tasks will be visible to the EdOrgs. Select 'is active' if you would like the task to appear in the monitoring program cycle. Add a task by selecting the 'Add New Data Collection Task' button. To edit a task, select the arrow next to the task.

<u>DATA COLLECTION TASK FIELD DEFINITIONS</u>

**Name:** This will be the name of the task that appears in the LEA Portal and will be viewed by the EdOrg.

**Purpose:** Describe the reason for which this task is included in the monitoring program. Include any details that may be helpful to the EdOrg to complete the task.

**Cycle:** Select a cycle that the data collection task will be assigned to in the monitoring program.

**Schedule Day:** The cycle tasks will start at the beginning of the fiscal year. The schedule day determines how many days within the cycle each task will start. The schedule day will start on the day after the previous cycle ends. When this task gets assigned to an EdOrg, this will dictate the task start date. Schedule day must be greater than zero.

**Days Allowed:** The days allowed determines how many days the EdOrg will have to complete the task. When this task gets assigned to an EdOrg, this will dictate the task end date.

**Collection Method:** Select the collection method to be used for the data collection task. This is the type of monitoring that will take place for this task.
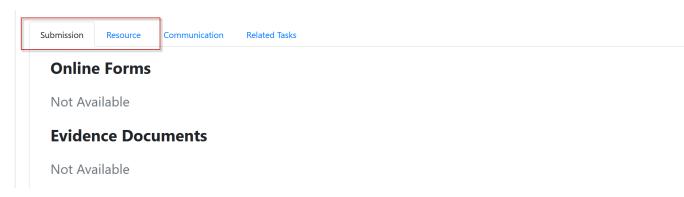
**Form/Documents:** Select one or more forms related to the task.

> ***Online forms*** will appear on the LEA Portal: task detail page – Submission tab

> ***Submissions Document*** will appear on the LEA Portal: task detail page – Submission tab

> ***All Other Document*** types will appear on the LEA Portal: task detail page – Resource tab

> <u>LEA PORTAL: DATA SUBMISSION PAGE</u>

| Submission | Resource | Communication | Related Tasks |
| --- | --- | --- | --- |

**Online Forms**

Not Available

**Evidence Documents**

Not Available

CONTINUED: DATA COLLECTION TASK FIELD DEFINITIONS

**Task Category ID:** The data collection task will be assigned based on the category selected. Options are; both, district or school.

> **Both:** The data collection task will be assigned to all schools and districts selected at the time the monitoring program cycle is assigned. The district will need to complete the task as part of their monitoring program as well as the school will need to also complete this task.

> **District:** The data collection task will be assigned to all districts selected at the time the monitoring program cycle is assigned. The district will need to complete the task as part of their monitoring program. Schools will not be assigned this task.

> **School**: The data collection task will be assigned to all schools selected at the time the monitoring program cycle is assigned. The school will need to complete the task as part of their monitoring program. Districts will not be assigned this task.
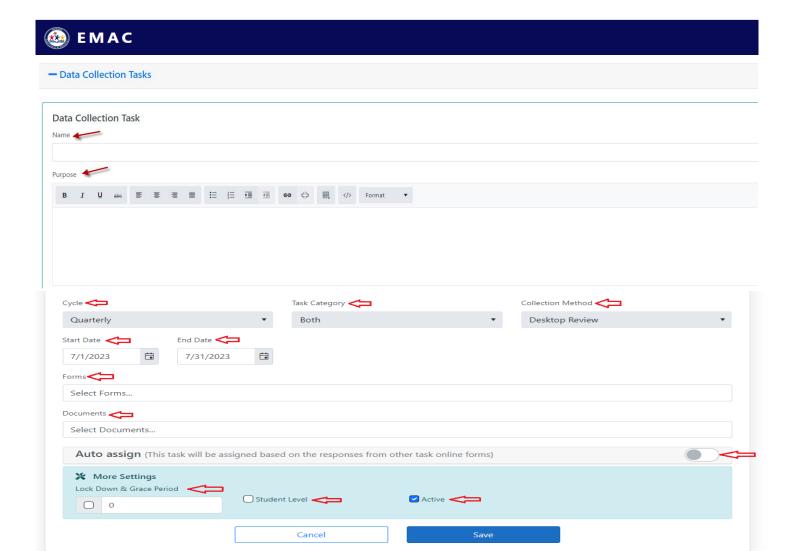
**Auto Assign:** Auto assign a data collection task triggered by a form response from a separate monitoring program task. Contact EMAC support team if you would like to utilize this option in your monitoring program setup.

**Lockdown and Grace Period:** Systematically lock this task by selecting the checkbox. Enter in the number of days to be added to the task end date and the task will automatically be locked after the grace period ends.

**Student Level:** Include the ability to add students and assign forms to each student for this task.

**CREATE A DATA COLLECTION TASK**

— Data Collection Tasks

+ Add New Data Collection Task

| Name | Purpose | Cycle | Schedule Day | Is Onsite Visit | Days Allowed | Is Active |
|---|---|---|---|---|---|---|
| C2-01 Statement of Assurance | Submission of the Cycle 2 Monitoring Instrument affirms that the LEA has reviewed all documents and procedures addressed in the monitoring instrument to verify compliance. | Cycle 2 | 1 | No | 30 | ✔ |

## Data Collection Tasks

### Data Collection Task

Name

Purpose

| B | I | U | abc | | | | | | | | | | | | Format | ▼ |

Cycle
Quarterly ▼

Task Category
Both ▼

Collection Method
Desktop Review ▼

Start Date
7/1/2023

End Date
7/31/2023

Forms
Select Forms...

Documents
Select Documents...

**Auto assign** (This task will be assigned based on the responses from other task online forms)

✕ **More Settings**
Lock Down & Grace Period
☐ 0

☐ Student Level

☑ Active

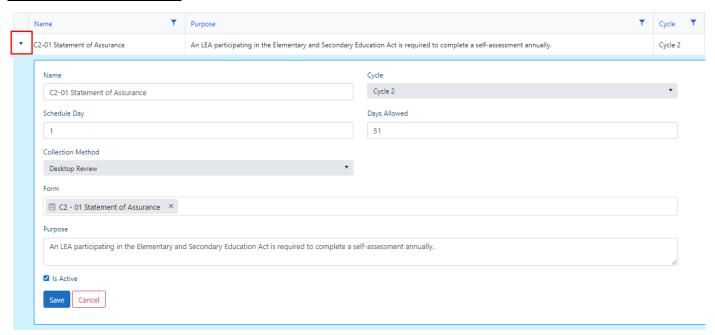Cancel | Save

---

*Tip:* *The evaluation task will automatically get created using the data collection task information when the saving the task.*

### EDIT A DATA COLLECTION TASK

| Name | | Purpose | | Cycle |
|------|--|---------|--|-------|
| ▼ C2-01 Statement of Assurance | | An LEA participating in the Elementary and Secondary Education Act is required to complete a self-assessment annually. | | Cycle 2 |

Name
C2-01 Statement of Assurance

Cycle
Cycle 2 ▼

Schedule Day
1

Days Allowed
51

Collection Method
Desktop Review ▼

Form
▦ C2 - 01 Statement of Assurance ✕

Purpose
An LEA participating in the Elementary and Secondary Education Act is required to complete a self-assessment annually.

☑ Is Active

Save | Cancel

## 6.6 *EVALUATION TASKS*

Evaluation tasks are internal to ADE. They are used to track the review and evaluation of the data collection tasks. One or more evaluation tasks can be created under a monitoring program cycle.  Each evaluation task must be associated with one data collection tasks. These tasks will be viewed by the Internal ADE staff only.

To edit a task, select the arrow next to the task.

**Cycle:** Select a cycle that the evaluation task will be assigned to in the monitoring program.

**Data Collection Task:** Select the data collection task you will be evaluating.

**Schedule Day:** The cycle tasks will start at the beginning of the fiscal year.  The schedule day determines how many days within the cycle each task will start. The schedule day will start on the day after the previous cycle ends. When this task gets assigned to an EdOrg, this will dictate the task start date. Schedule day must be greater than zero.

**Purpose:** Describe the reason for which this task is included in the monitoring program. Include any details that may be helpful to the specialist to complete the task.

**Form:** Select one or more forms or documents related to the task.  This will appear on the task resource tab.



**Task Category ID:** The Evaluation task will be assigned the same task category as the associated data collection task. Options; both, district or school.
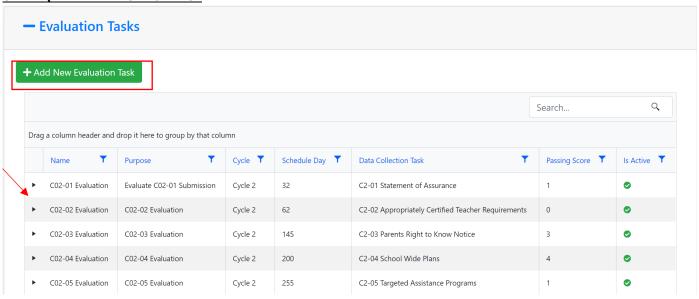
> **Both:** The data collection task will be assigned to all schools and districts selected at the time the monitoring program cycle is assigned. The district will need to complete the task as part of their monitoring program as well as the school will need to also complete this task.
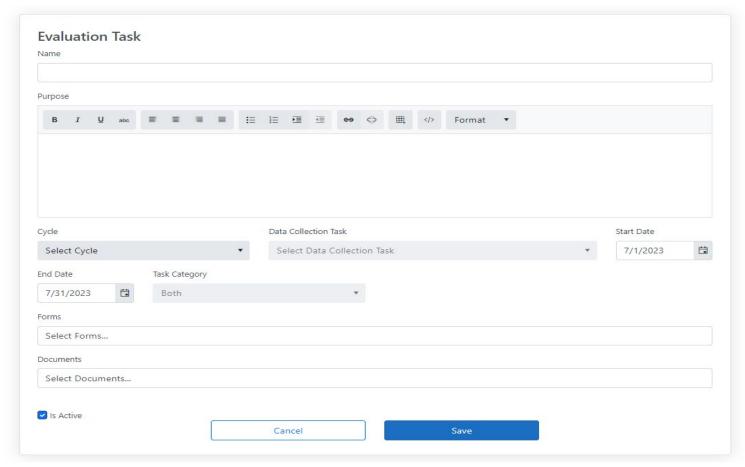
> **District:** The data collection task will be assigned to all districts selected at the time the monitoring program cycle is assigned. The district will need to complete the task as part of their monitoring program.  Schools will not be assigned this task.

> **School**: The data collection task will be assigned to all schools selected at the time the monitoring program cycle is assigned. The school will need to complete the task as part of their monitoring program.  Districts will not be assigned this task.

**CREATE\EDIT AN EVALUATION TASK**

**— Evaluation Tasks**

**+ Add New Evaluation Task**

Search...

Drag a column header and drop it here to group by that column

| Name | Purpose | Cycle | Schedule Day | Data Collection Task | Passing Score | Is Active |
|------|---------|-------|--------------|----------------------|---------------|-----------|
| C02-01 Evaluation | Evaluate C02-01 Submission | Cycle 2 | 32 | C2-01 Statement of Assurance | 1 | ✓ |
| C02-02 Evaluation | C02-02 Evaluation | Cycle 2 | 62 | C2-02 Appropriately Certified Teacher Requirements | 0 | ✓ |
| C02-03 Evaluation | C02-03 Evaluation | Cycle 2 | 145 | C2-03 Parents Right to Know Notice | 3 | ✓ |
| C02-04 Evaluation | C02-04 Evaluation | Cycle 2 | 200 | C2-04 School Wide Plans | 4 | ✓ |
| C02-05 Evaluation | C02-05 Evaluation | Cycle 2 | 255 | C2-05 Targeted Assistance Programs | 1 | ✓ |

**Evaluation Task**

Name

Purpose

B   I   U   abc   |   ≡   ≡   ≡   ≡   |   ≔   ≔   ⇥   ⇤   |   ⇔   ⇎   |   ⊞   </>   Format ▼

Cycle

Select Cycle ▼

Data Collection Task

Select Data Collection Task ▼

Start Date

7/1/2023 🗓

End Date

7/31/2023 🗓

Task Category

Both ▼

Forms

Select Forms...

Documents

Select Documents...

☑ Is Active

Cancel    Save

**Tip:** Select the checkbox on the header row of the grid to select all EdOrgs on the page.

## 6.7 *DETERMINATION TASKS*

Determination tasks are internal to ADE. They are used to track how the EdOrg performed during the monitoring cycle. Determination tasks are created for each monitoring program cycle and associated to one or more evaluation tasks. This task can be used to summarize the completion of the monitoring program cycle.

To edit a task, select the arrow next to the task.

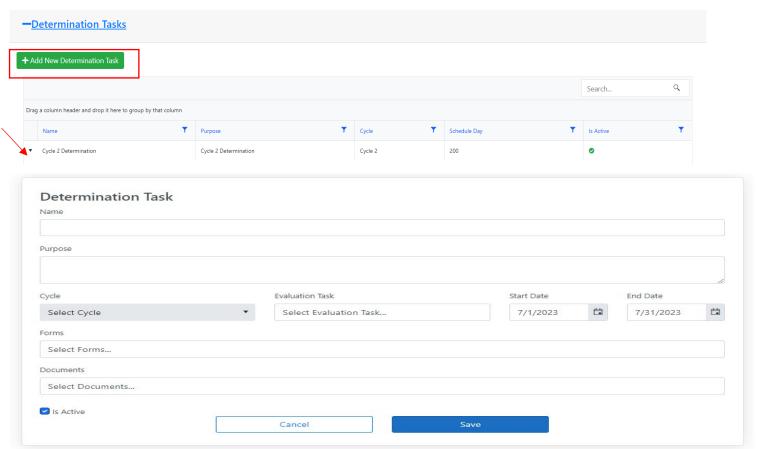**Cycle:** Select a cycle that the determination task will be assigned to in the monitoring program.

**Evaluation Task:** Select one or more evaluation task you will be using as part of your cycle determination.

**Schedule Day:** The cycle tasks will start at the beginning of the fiscal year. The schedule day determines how many days within the cycle each task will start. The schedule day will start on the day after the previous cycle ends. When this task gets assigned to a specialist, this will dictate the task start date. Schedule day must be greater than zero.

**Purpose:** Describe the reason for which this task is included in the monitoring program.

**Form:** Select one or more forms or documents related to the task. This will appear on the task resource tab.

**CREATE\EDIT A DETERMINATION TASK**



# 7. Monitoring Program Assignment

Assign monitoring program cycles to an EdOrg, assign staff to monitoring program tasks, View/Edit Monitoring Program Schedules.

**UnAssigned Tab:** List of all the Education Organizations which are UnAssigned to the selected Monitoring Cycle.

**Assigned Tab:** List of all the Education Organizations which are Assigned to the selected Monitoring Cycle. (Regardless of EdOrg Roles)

**Primary Staff Member:** Select the staff member that will be assigned as the primary contact on all the tasks within in the monitoring program for the selected EdOrgs.
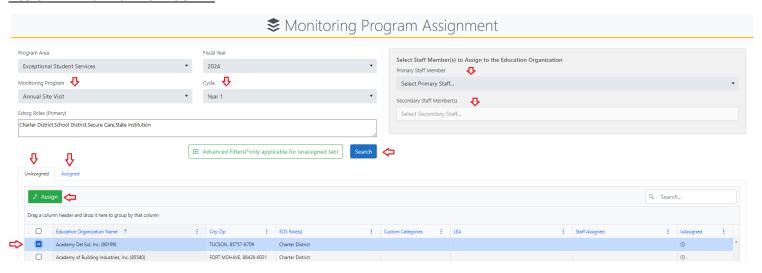
**Secondary Staff Member(s):** Select one or more staff member(s) that will be assigned as the secondary contact on all the tasks within in the monitoring program for the selected EdOrgs.

**Temporary Staff Member(s):** Select the temporary assignment checkbox if the primary staff member assigned is only assigned temporarily to be reassigned to a different staff member at a later date.

### STEPS TO ASSIGN A MONITORING PROGRAM CYCLE:

Step 1: Select fiscal year, monitoring program and cycle to assign.

Step 2: Apply any required advanced filters. (Optional)

Step 3: Click Search button.

Step 4: UnAssigned tab will display a list of UnAssigned Education Organizations and Assigned tab will display all the Assigned Education Orgranizations.

Step 5: Select the primary and secondary staff members to be assigned to all the monitoring program tasks.

Step 4: In the UnAssigned grid section, select the checkbox next to one or more EdOrg(s) for assignment.

Step 5: Select the Assign button to assign the EdOrgs to the monitoring program cycle.

Step 6: Select '*Details*' under the Action Column to review the assigned schedule for that EdOrg.

**ASSIGN THE MONITORING PROGRAM**



> **Tip:** Select the checkbox on the header row of the grid to select all EdOrgs on the page.
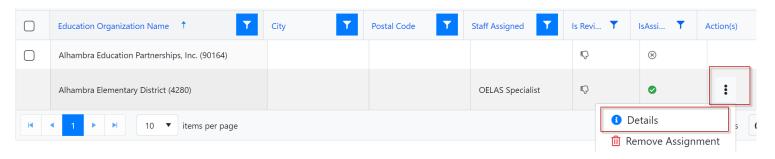
## 7.1 REVIEW/EDIT MONITORING PROGRAM SCHEDULE

Once the monitoring program has been assigned to an EdOrg, Select the 'Details' menu option under the actions related to the EdOrg to review the tasks assigned for the monitoring program schedule.

Select the 'Details' menu option under the actions column related to the data collection task to edit the schedule dates, or staff assigned to an EdOrg. Submit the changes and return to the schedule review page.

Select 'Mark as Reviewed' when the schedule review is complete. Select the 'Mark as Reviewed' button when the schedule review is complete.
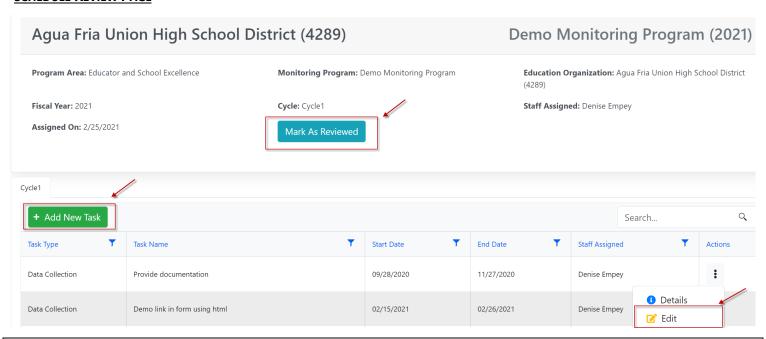
**REVIEW THE SCHEDULE**



> **Tip:** The monitoring tasks will appear in the LEA Portal as soon as they are assigned regardless of the review status.

## SCHEDULE REVIEW PAGE



### Agua Fria Union High School District (4289)          Demo Monitoring Program (2021)

**Program Area:** Educator and School Excellence

**Monitoring Program:** Demo Monitoring Program

**Education Organization:** Agua Fria Union High School District (4289)

**Fiscal Year:** 2021

**Cycle:** Cycle1

**Staff Assigned:** Denise Empey

**Assigned On:** 2/25/2021

**Mark As Reviewed**

Cycle1

**+ Add New Task**                                    Search...

| Task Type | Task Name | Start Date | End Date | Staff Assigned | Actions |
|---|---|---|---|---|---|
| Data Collection | Provide documentation | 09/28/2020 | 11/27/2020 | Denise Empey | ⋮ |
| Data Collection | Demo link in form using html | 02/15/2021 | 02/26/2021 | Denise Empey | |

ⓘ Details
✎ Edit

**Tip:** Select the '*Add New Task*' button to add a task to the EdOrg schedule. This will not be added to any other EdOrg Schedule.

## EDIT A MONITORING PROGRAM TASK

### Schedule Task                                    ✕

**Task Type:** Data Collection

**Modified By:** emactitleone.super@mailnesia.com

**Task:** Provide documentation

**Last Modified On:** 3/3/2021 3:09:18 PM

**Cycle:** Cycle1

**Originally Scheduled Date:** 9/28/2020

**Data Collection Method:** Onsite Visit

📋          C2 - 01 Statement of Assurance          Online

**Primary Staff Assigned**                      **Secondary Staff Assigned**

Denise Empey ▼                                  Select Secondary Staff...

☑ Temporary Assignment

Close          Submit

## 7.2 REMOVE MONITORING PROGRAM SCHEDULE

To remove the monitoring program schedule assigned to the EdOrg, select the 'Remove Assignment' Action next to the EdOrg.  This action should only be used if the EdOrg was **incorrectly assigned** to the monitoring program or cycle.  Do not use this feature for staff assignment changes or school closings.

 **Warning**: Once the EdOrg has been removed from the monitoring program, they will no longer have access to any of the online forms or submissions related to those tasks even if they are reassigned at a later date.

### REMOVE A MONITORING PROGRAM ASSIGNMENT

| Education Organization Name ↑ | ▼ | City | ▼ | Postal Code | ▼ | Staff Assigned | ▼ | Is Revi... ▼ | IsAssi... ▼ | Action(s) |
|---|---|---|---|---|---|---|---|---|---|---|
| Alhambra Education Partnerships, Inc. (90164) | | | | | | | | 👎 | ⊗ | |
| Alhambra Elementary District (4280) | | | | | | OELAS Specialist | | 👎 | ✅ | ⋮ |

| ◄ | 1 | ► | ►| | 10 ▼ | items per page | | | | ⓘ Details |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | 🗑 Remove Assignment |
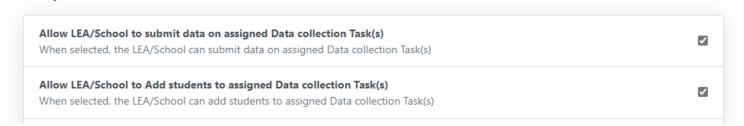
## 7.3 ADD STUDENT AND STUDENT FORMS TO DATA COLLECTION TASK

**Note:**

LEA's will also have ability to add Student and Student Form Data if below program area configurations are checked under "Program Area Manager" Settings.

## LEA/School Data Submission

| | |
|---|---|
| **Allow LEA/School to submit data on assigned Data collection Task(s)**<br>When selected, the LEA/School can submit data on assigned Data collection Task(s) | ☑ |
| **Allow LEA/School to Add students to assigned Data collection Task(s)**<br>When selected, the LEA/School can add students to assigned Data collection Task(s) | ☑ |
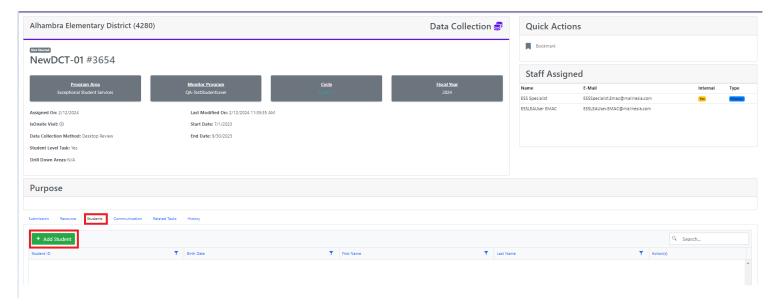
System will display Azed's student data only when below checkbox is checked.
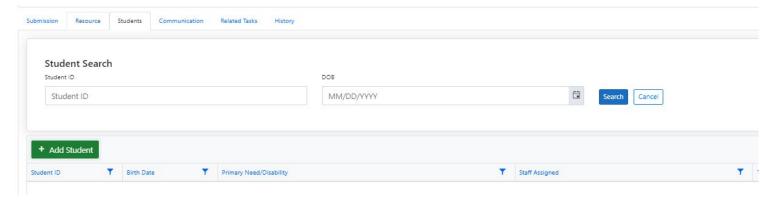
## Miscellaneous

**Student Source System**
The system relies on AZesds data to provide Student data. If you want to modify this setting, you need to collaborate with IT team.

Save Changes

## Step 1: Add Student

In the Data Collection Task, Under Student Tab. Click on "Add Student".

Alhambra Elementary District (4280)                                    Data Collection

Not Started
NewDCT-01 #3654

| Program Area | Monitor Program | Cycle | Fiscal Year |
| Exceptional Student Services | QA-TestStudentLevel | Cycle 1 | 2024 |

**Assigned On:** 2/12/2024          **Last Modified On:** 2/12/2024 11:35:35 AM
**IsOnsite Visit:** ⊙                **Start Date:** 7/1/2023
**Data Collection Method:** Desktop Review    **End Date:** 9/30/2023
**Student Level Task:** Yes
**Drill Down Areas:** N/A

**Quick Actions**

Bookmark

**Staff Assigned**

| Name | E-Mail | Internal | Type |
| ESS Specialist | ESSSpecialist.Emac@malinesia.com | Yes | Primary |
| ESSLEAUser EMAC | ESSLEAUser.EMAC@malinesia.com | | |

## Purpose

Submission   Resource   Students   Communication   Related Tasks   History

+ Add Student                                                          Search...

| Student ID | Birth Date | First Name | Last Name | Action(s) |

For Azed's Student, Lookup Student Data using Student ID and Date of Birth.

Submission   Resource   Students   Communication   Related Tasks   History

### Student Search

Student ID                          DOB
[Student ID]                        [MM/DD/YYYY]          Search   Cancel

+ Add Student

| Student ID | Birth Date | Primary Need/Disability | Staff Assigned |
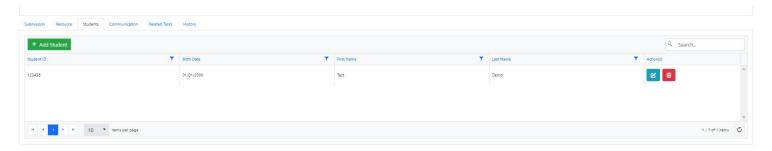
For Non Azed's Student Data, add below student Information and click on "Save".
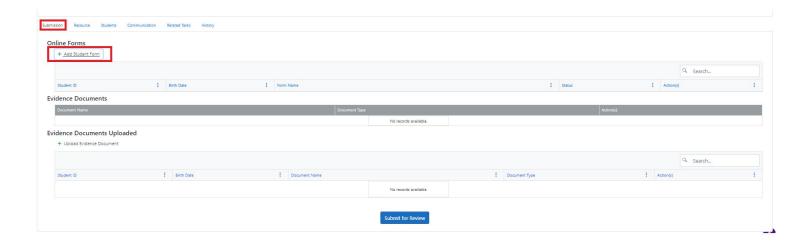


Step 2: Once Student is added, Student should appear in below grid.



Note: User can perform edit and delete action from this grid on a specific student.
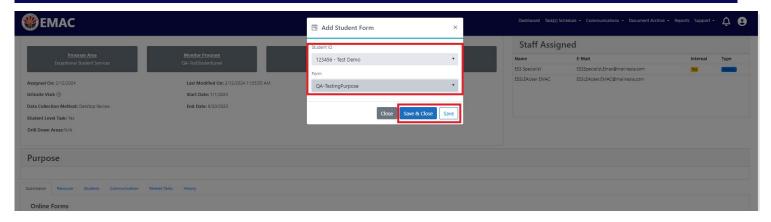
Step 3: Associate Online form to Student for data submission related to the student.

In Submission Tab, select "Add Student Form".



A popup should appear to search and add student and select the form.

Once the student is associated with a form, User should be able to click on "Not Started" and submit data for the student.
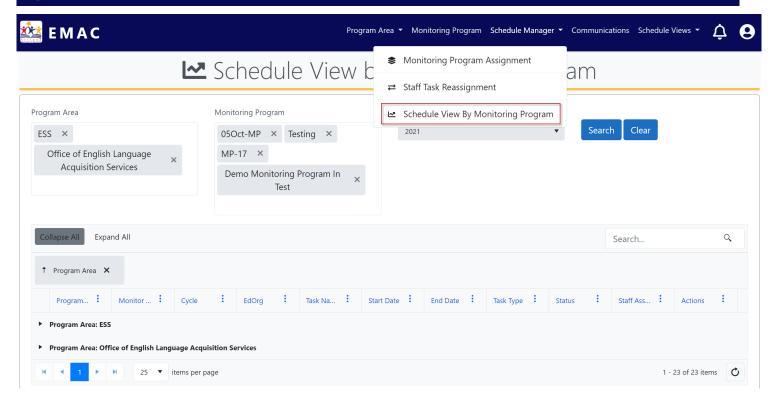


# 8. Schedule View By Monitoring Program

This view will only be available to the EMAC Super User. The user will be able to view multiple program area monitoring program assignments for an EdOrg. The user can evaluate the number of tasks required by an EdOrg during the fiscal year.

**SCHEDULE VIEW BY MONITORING PROGRAM**

# EMAC

**EMAC**

Program Area ▾    Monitoring Program    Schedule Manager ▾    Communications    Schedule Views ▾    🔔    👤

☰ Monitoring Program Assignment

⇄ Staff Task Reassignment

📈 Schedule View By Monitoring Program

## 📈 Schedule View b̶y̶ ̶...  am

| Program Area | Monitoring Program |
|---|---|
| ESS ✕ | 05Oct-MP ✕    Testing ✕ |
| Office of English Language Acquisition Services ✕ | MP-17 ✕ |
| | Demo Monitoring Program In Test ✕ |

2021 ▾    Search    Clear

Collapse All    Expand All                                    Search...    🔍

↑ Program Area ✕

| Program... ⋮ | Monitor ... ⋮ | Cycle ⋮ | EdOrg ⋮ | Task Na... ⋮ | Start Date ⋮ | End Date ⋮ | Task Type ⋮ | Status ⋮ | Staff Ass... ⋮ | Actions ⋮ |
|---|---|---|---|---|---|---|---|---|---|---|

▶ **Program Area: ESS**

▶ **Program Area: Office of English Language Acquisition Services**

|◀ ◀ 1 ▶ ▶|    25 ▾ items per page                                    1 - 23 of 23 items  ↻

# 9. Monitoring Program Maintenance

## 9.1 TASK CHANGES TO AN ASSIGNED MONITORING CYCLE
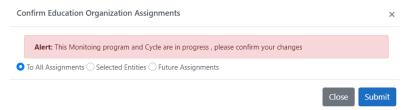
The only changes allowed to a task once it is assigned to an EdOrg are the task name and the task purpose. If other changes are required to a task during the current monitoring cycle, the clone and retire actions can be used to minimize the disruption of the current monitoring. This feature will only be available to the EMAC Super User.

**CLONE A TASK**

- Make a copy of the current task by selecting the **Clone** button. A copy of the task will be created and allow you to update the task as needed.
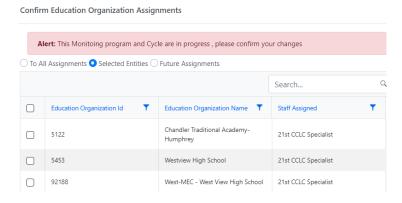


- Select the **Save** button on the cloned task and a prompt will appear with options.



Option 1: **To All Assignments** - All current EdOrgs assigned to the monitoring program cycle will get the cloned task in their current schedule.

Option 2: **Selected Entities –** Select which EdOrgs you would like to receive the cloned task.
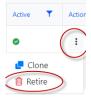


Option 3: **Future Assignments** - Only new EdOrg assignment will get the cloned task. All current EdOrgs will not get the cloned task.

- Select desired option and the **submit** button to complete the task creation.

### RETIRE A TASK
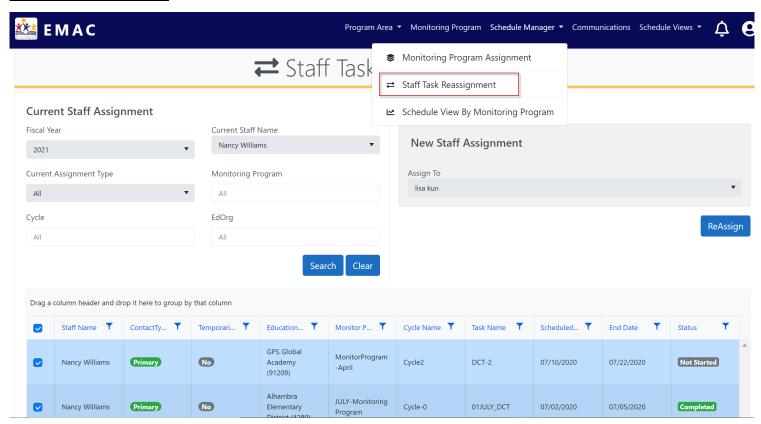
Use the retire option to make a current task inactive.  The assigned EdOrgs will be able to view this task but will not be able to make updates to the task.



## 9.2 STAFF TASK REASSIGNMENT

This feature will only be available to the EMAC Super User. The user will be able to change the monitoring program assignments for an EdOrg.  Select the Current Staff Name and the search button to display the tasks assigned to the current staff member.  Select the tasks and the new staff assignment to be reassigned.  By selecting the reassign button the tasks will be reassigned to the new staff member.

### STAFF TASK REASSIGNMENT
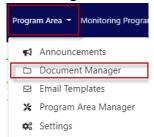
## 9.3 *ROLLOVER PREPARATION*

This functionality is only available to the EMAC Super User. These are the steps involved in preparing for the rollover process. Some steps are optional.

***STEPS TO COMPLETE TO PREPARE FOR THE ROLLOVER PROCESS***
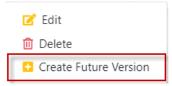
1. <u>Online Form Changes:</u>  Follow these steps if a form needs to be updated for the next fiscal year. If there are no changes required, skip step 1.

    a.  Select **Program Area/Document Manager**

    b.  Scroll down to the document grid and find the form to update

    c.  Under the Actions Column select ellipse next to the form

    d.  Select the **Create Future Version** menu option. This will prevent impacting the current monitoring program users

    e.  Enter the effective date for the new version of the form.  Enter the date the monitoring program will be assigned. Select the **Submit** button
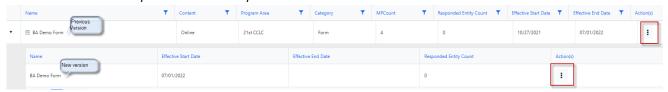
CONTINUED: *ROLLOVER PREPARATION*
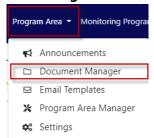
 f. Update and save the form (Do not change the name of the form)
  *Note: The document grid will display all versions of the form. You can continue to update the older version of the form until the effective end date.*
  *The version of the form that displays to the user coincides with the effective start date of the form and the date the user enters information on the form.*
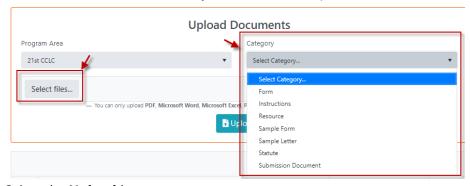


2. Upload Documents: Follow these steps if there are new documents needed for the next fiscal year. If there are no new documents required, skip step.
  a. Select **Program Area/Document Manager**



  b. Under **Upload Documents** select the **Category** for the uploaded file
   *\*Note: see Appendix C for Category Descriptions*
  c. **Select Files** and choose the file you would like to upload
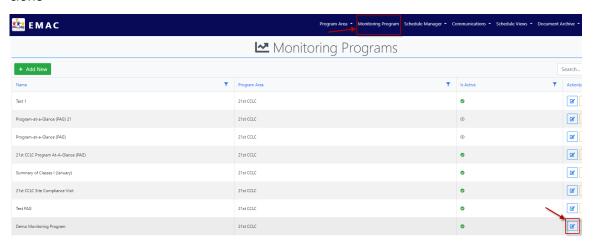


  d. Select the **Upload** button

3. Clone Monitoring Program (MP): Follow these steps to create the monitoring program for the next fiscal year. This step is required.

   a. Select **Monitoring Program** menu option
   b. Select the **Edit** button under the action(s) column next to the monitoring program you would like to clone



   c. Select the **Clone** button



   d. Select the next **fiscal year** in the dropdown and then select the **Clone** button



   e. Select the **Save** button to save the monitoring program
   f. Make any needed changes to the MP, Cycle and tasks for the next fiscal year
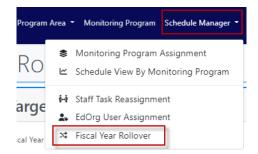
## 9.4 ROLLOVER INSTRUCTIONS

This functionality is only available to the EMAC Super User. The super user will be able to rollover the education organizations from one monitoring program/cycle to another monitoring program/cycle.

### STEPS TO COMPLETE THE ROLLOVER

1. <u>Select List to Transfer:</u> Follow these steps to rollover the monitoring program EdOrgs from one MP/Cycle to another MP/Cycle.  This step is optional.  The EdOrgs can be manually assigned.

   a. Select **Schedule Manager/Fiscal Year Rollover** menu option

   b. Under the **Source** heading select the **Fiscal Year** and **Monitoring Cycle** to get a list of EdOrgs to rollover.

   c. Select the checkbox next to the EdOrgs you would like to rollover.

   d. Select the Target Fiscal Year and Monitoring Cycle you would like your list of EdOrgs to be assigned to.
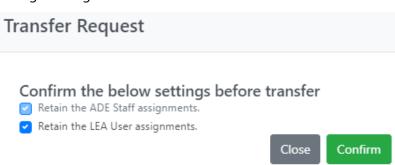
   e. Select the **Transfer** button.

f.  Change settings if needed and select the **Confirm** button.

**Transfer Request**

Confirm the below settings before transfer
- ☑ Retain the ADE Staff assignments.
- ☑ Retain the LEA User assignments.

Close    Confirm

Transfer Settings

i.   **Retain the ADE Staff assignments:** This option will copy the current primary and secondary staff assignments from the previous MP/Cycle to the Target MP/Cycle.  You will be able to change these prior to publishing.

ii.  **Retain the LEA User Assignments:** This option will copy the current EdOrg User access to the Target MP/Cycle.
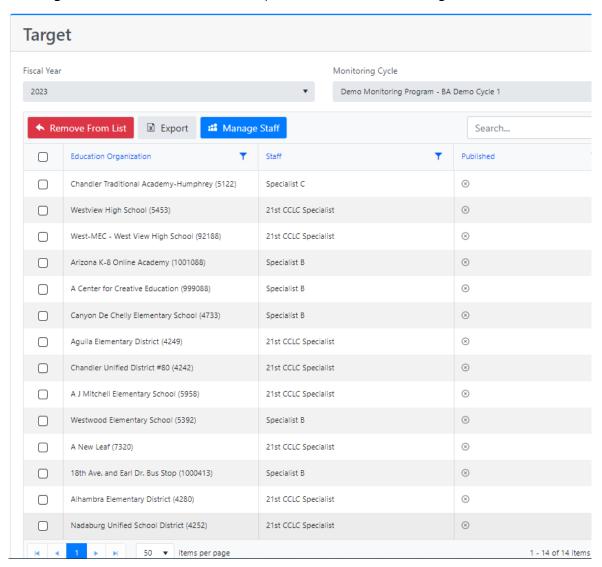
**The transfer result**: This provides the total EdOrgs that were successfully transferred.

**Transfer Result**

Total: 14          Success: 14          Fail: 0

Success:
1. Chandler Traditional Academy-Humphrey (5122)
2. Westview High School (5453)
3. West-MEC - West View High School (92188)
4. Arizona K-8 Online Academy (1001088)
5. A Center for Creative Education (999088)
6. Canyon De Chelly Elementary School (4733)
7. Aguila Elementary District (4249)
8. Chandler Unified District #80 (4242)
9. A J Mitchell Elementary School (5958)
10. Westwood Elementary School (5392)
11. A New Leaf (7320)
12. 18th Ave. and Earl Dr. Bus Stop (1000413)
13. Alhambra Elementary District (4280)
14. Nadaburg Unified School District (4252)

CONTINUED: *ROLLOVER INSTRUCTIONS*

2. Update List of EdOrgs: This list can be updated to remove EdOrgs and change the staff assignments prior to publishing the rollover.

   a. **Target List:** Once the transfer is complete, review the list of EdOrgs.
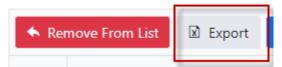


   b. **Remove EdOrgs:** Remove any EdOrgs you do not want to include in the rollover. To Remove EdOrgs from the list, select the checkbox next to the EdOrg you would like to remove and then select the **Remove from List** button**.**

    c.   **Export List:** To export the list of EdOrgs to excel, select the **Export** button**.**



    d.   **Manage Staff:** To change the staff assignments, select the **Manage Staff** button**.** Under the **transfer from** heading, select the staff assignment you would like to change and then under the **transfer to** heading, select staff name to that will be assigned these tasks.  The primary or secondary staff assignments can be changed. **Save** your changes. Changes will appear on the **Target** List



3.   <u>Publish:</u> This step will assign the monitoring cycle tasks to the EdOrgs.
    a.   select the checkbox next to the EdOrgs you would like to include.



    b.   Select the **Publish**  button to assign the MP/Cycle to the list of EdOrgs.
       *Note: The publish button will appear when the FY23 data is available.*

# 10. Appendix A

## *DEFINITIONS*

**Education Organization (EdOrg):** Master list of organizations specific to education that may participate in a monitoring cycle.

**Education Organization Role:** A categorization of a large group of EdOrgs (Public Districts, Charter Schools, etc.).

**Program Area:** Business unit managing the monitoring program.

**Specialist**: An ADE employee who concentrates primarily on a particular subject or activity; a person highly skilled in a specific and restricted field.

**Specialty Type:** A method of identifying skillsets and associating these skillsets to a staff member or a monitoring program task (e.g. Audiologist).

**Task Type:** There are three types of tasks: Data Collection, Evaluation and Determination. Data Collections tasks are assigned to the EdOrgs to complete the submissions required. Evaluation tasks are assigned to internal staff to track the review of the data submissions. Determination tasks allow are used to gage if the EdOrg has met all of the requirements for the monitoring cycle.

**EMAC Session Time Out:** The standard time out period for the EMAC application is 20 minutes.
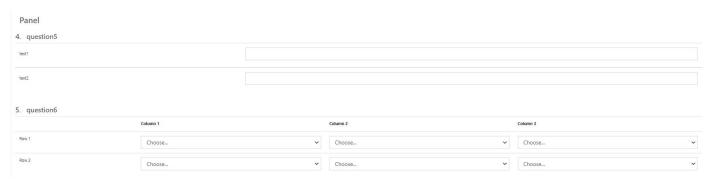
**EMAC Rollover Process:** A process that allows the super user to move the list of EdOrgs from one monitoring program/Cycle assignment to another monitoring program assignment/Cycle to prepare for the upcoming monitoring.

# 11. Appendix B
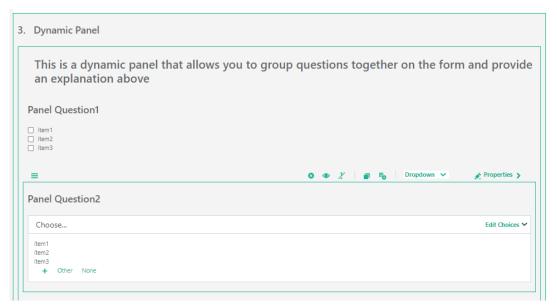
## FORM BUILDER QUESTION TYPES

1.  **Panel:** Group of questions with heading and instructions.



2.  **Dynamic Panel:** Users select the **Add New** button on the form to add the panels on demand.

Form Designer



Sample Form (Dynamic Panel
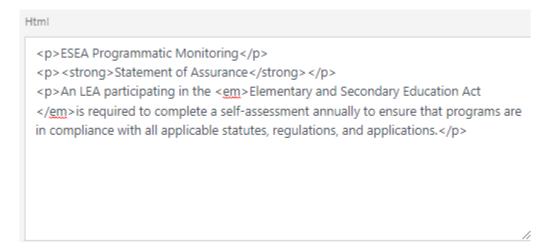
3. **Image:** Allows the user to import an image into the form



4. **Html:** Allows the user to format text within the form with the assistance of a html translator. This is for read only text. Do not put your questions into the html translator.



- Copy formatted text into word editor
- Select HTML tab
- Select all text in html
- Paste into Form builder html box



- Results



5. **Signature Pad:** Allows the user to sign a form in the box.

6. **Matrix Single Choice:** For each row, the user can select one response.



7. **Matrix Multiple Choice:** For each row, the user can select multiple dropdown responses by column.



8. **Matrix Dynamic Rows:** Add new rows by the user as needed
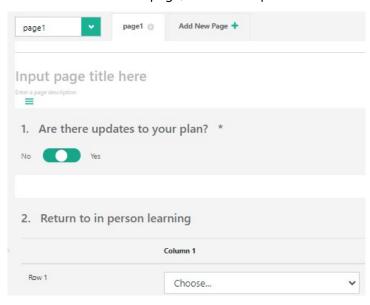
## HOW TO CUSTOMIZE IN FORM BUILDER

**FORM BUILDER- DISPLAY NEXT QUESTION BASED ON PREVIOUS QUESTION RESPONSE**
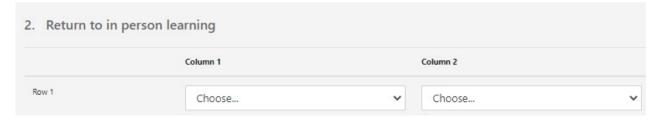
There is functionality in the form builder to trigger displaying questions based on a form response from a previous question. This example below shows how to set up this scenario in form builder.

It is using the response from question1 (Are there updates to your plan?) to trigger displaying question2 (Return in person learning). If the user selects 'Yes' to question1 then question2 will display on the form.

1. On the left side on the page, Create the questions on the form. This example has two questions



2. On the left side on the page, **Select the question on the form** that you would like to display based on a response. The question below (Return to In Person Learning) will only display based on the response from question1.



3. On the right side of the page under properties, select the **logic** dropdown
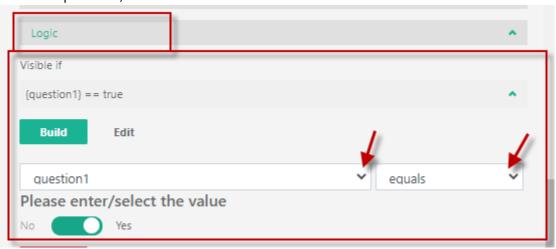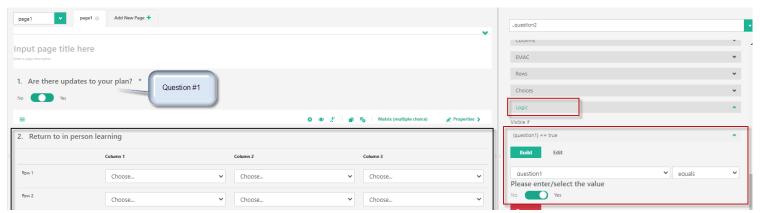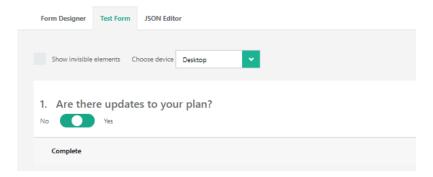


   - Select **Visible if** dropdown

4. **Logic/Build** (Dropdown list under build)
   o select the question you would like to use (this example is Question1)
   o Select the mathematical symbol next to the question
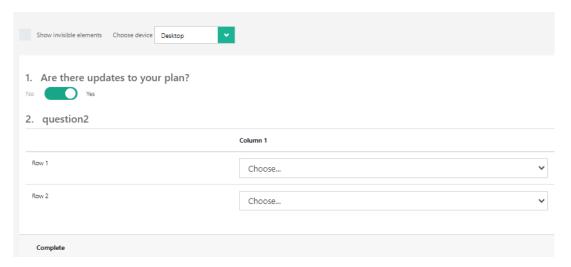   o Select the value to trigger displaying a question (In this example it will display question2)
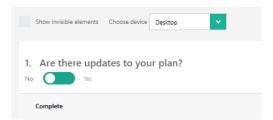




5. Review Form by selecting **Test Form**

6.  Select 'Yes' on the test form



7.  Select 'No'



**FORM BUILDER:** EXPAND SINGLE INPUT

Expand the Single Input questions by changing the property from **Single Input** to **Comment** to extend the Single Input response to multiple lines.



*Note: The Form download feature does not support multiple line responses. Sample below.*
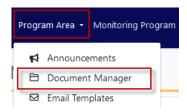
## *HOW TO COPY A FORM*

**FORM BUILDER-** DOCUMENT MANAGER

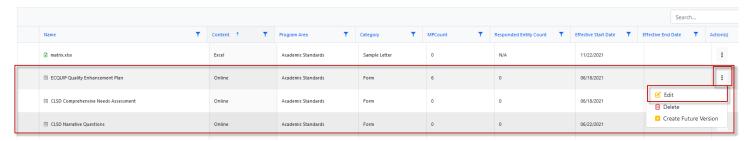To copy a form from the test environment to the production environment, follow the steps provided below.

1. Open browser with test link EMAC Test hyperlink, login with test ID, select the **UAT** link.

   | EMAC- UAT | ☆ ☒ |
   |-----------|-----|

2. Select **Program Area/Document** Manager from the top menu bar.



3. On the form grid Go to **Actions** column next to the form you would like to copy. Select the **elipse/Edit** to open the form.



4. Select the **JSON Editor** tab



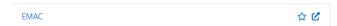5. Highlight text in to copy (turns blue when selected)



6. Right mouse click and select **copy.**
7. Open a new browser window preferably a different browser than above.
8. Go to the website **https://www.azed.gov/**

CONTINUED: **FORM BUILDER-** COPY A FORM

9. Select **ADEConnect** from the top menu
10. Select **EMAC** link on the ADEConnect page.

> EMAC                                    ☆ ☑

11. Select **Program Area/Document Manager** from the top menu bar.
12. Select **Create** button under Create Online form section.
13. Select the **JSON Editor** tab

Form Designer    Test Form    JSON Editor

↺ Undo    ↻ Redo    🗐 Copy    ✂ Cut    📋 Paste

14. Right Mouse Click on blue highlighted text and select **paste**.

```
1  {
2    "pages": [
3      {
4        "name": "page1"
5      }
6    ]
7  }
```

15. Select **Test Form** tab**.** Verify Form.

Form Designer    Test Form    JSON Editor

16. Enter **Form Name.**

Form Name

[                    ]

17. Select **Form Designer** tab**.**
18. **Save.**

Form Designer    Test Form    JSON Editor

TOOLBOX    ◄    ↺ Undo    ↻ Redo    ⚙ Form Settings    Options    Save Form    Custom Toolbox Items

---

**Tip:** The reporting attributes do not copy with this procedure. They need to be added each time the form is created.
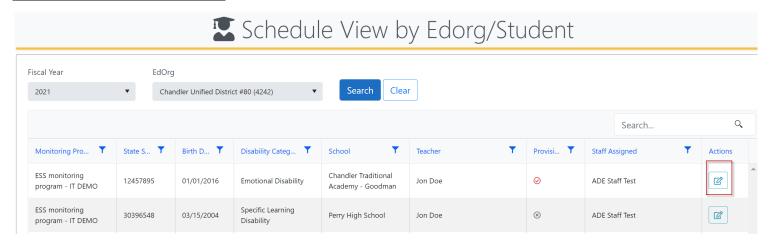
# 12. Appendix C

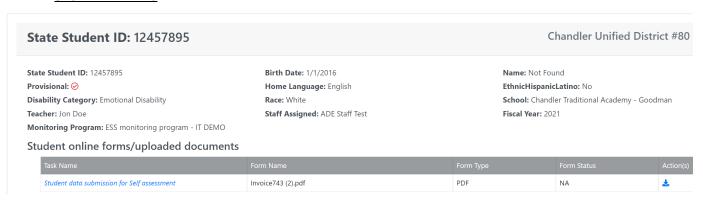## *SCHEDULE VIEW BY EDORG/STUDENT*

This view is available to ADE Staff if the program area chooses to capture and report the monitoring data at a student level. This will provide a view of all the students assigned to an EdOrg for the monitoring year.  Actions are setup to view student details and task assignment.

### SCHEDULE VIEW BY EDORG/STUDENT



**Actions-Student Details:** The staff member will be able to view the student details and the task assignment within the monitoring program.
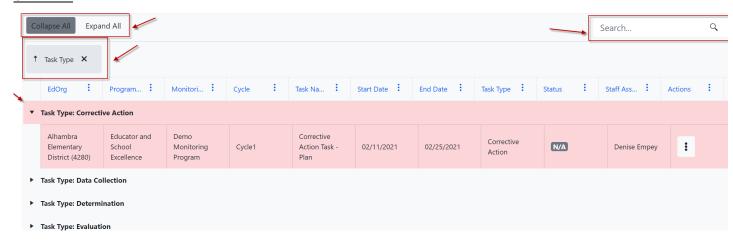
### STUDENT DETAILS

**State Student ID:** 12457895                               Chandler Unified District #80

| | | |
|---|---|---|
| **State Student ID:** 12457895 | **Birth Date:** 1/1/2016 | **Name:** Not Found |
| **Provisional:** ⊘ | **Home Language:** English | **EthnicHispanicLatino:** No |
| **Disability Category:** Emotional Disability | **Race:** White | **School:** Chandler Traditional Academy - Goodman |
| **Teacher:** Jon Doe | **Staff Assigned:** ADE Staff Test | **Fiscal Year:** 2021 |
| **Monitoring Program:** ESS monitoring program - IT DEMO | | |

Student online forms/uploaded documents

| Task Name | Form Name | Form Type | Form Status | Action(s) |
|---|---|---|---|---|
| *Student data submission for Self assessment* | Invoice743 (2).pdf | PDF | NA | ⬇ |

# 13. Appendix D

## *SCHEDULE VIEW GRID FEATURES:*
All schedule views have features available to manipulate the grid view results.

**GRID VIEW**



**Drag and Drop:** Drag a column heading to the grid bar to group items in the grid. Example below shows grouping by task type.

**Collapse All:** Collapse the grouped data to view groupings.

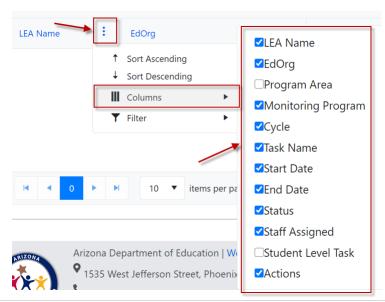**Expand All:** Expand the grouped data to view all details.

**Search:** Enter Search criteria for any text field in the grid.

**Sort Ascending:** Sort the data in ascending order by the column selected.  Example shows LEA Name.

**Sort Descending Order:** Sort the data in descending order by the column selected.

**Columns:** Select the checkbox next to the columns you would like to see in your grid view.
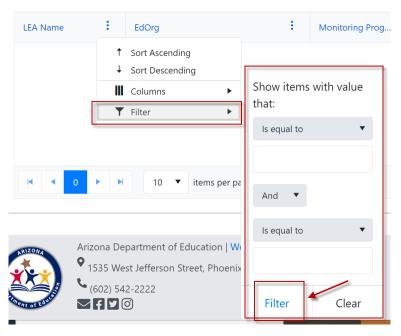
**ADD AND REMOVE COLUMNS FROM A GRID VIEW**

CONTINUED: SCHEDULE VIEW GRID FEATURES

### FILTER GRID RESULTS

**Filter:** Enter filter criteria and Select the **filter** button to limit the grid view results.
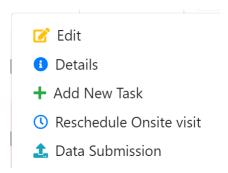


### ACTIONS COLUMN:

**Actions:** Each task on the grid will have options under the **actions** column. The options available will depend on the type of task.



### ACTIONS FOR A DATA COLLECTION TASK

# 14. Appendix E

*DOCUMENT CATEGORIES*

| Document Manager | | EMAC Portal | |
|---|---|---|---|
| **Document Category** | **Description** | **Details Page** | **Sub Heading** |
| Form | Uploaded form | Resource Tab | N/A |
| Instructions | Steps to complete submissions | Resource Tab | N/A |
| Resource | Additional information to support submissions | Resource Tab | N/A |
| Sample Form | Form example | Resource Tab | N/A |
| Sample Letter | Letter example | Resource Tab | N/A |
| Statute | Statute supporting monitoring task | Resource Tab | N/A |
| Submission Document | Document to be uploaded as a part of the submissions | Submissions Tab | Evidence Documents |

# 17. Use Cases

## 17.1 *CREATE A MONITORING PROGRAM*

**Pre-Requisite Step:**

Create Online Forms/Upload Documents in EMAC.

Reference: EMAC Staff Reference Guide, **Section 5**

**Step 1: Monitoring Program Setup:**
- Create a New Monitoring Program.
  - Reference: EMAC Staff Reference Guide, **Section 6**
- Configure a Monitoring Program.
  - Reference: EMAC Staff Reference Guide, **Section 6.1**
- Create a Monitoring Cycle.
  - Reference: EMAC Staff Reference Guide, **Section: 6.4**
- Add/Create Tasks.
  - Reference: EMAC Staff Reference Guide, **Section 6.5-6.7**

**Step 2: Assign the Monitoring Programs to Service Providers/Education Organizations:**

Reference: EMAC Staff Reference Guide, **Section 7**

**Step 3: Add Students and Student forms:**

- ADE Staff:
  - Reference: EMAC Staff Reference Guide, **Section 16**
- LEA User/Service Provider Users:
  - Reference: EMA Portal User Guide, **Section 13**