

Plans

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
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My Plans

The My Plans page allows the user to view and enter their current plan and view any previous plans.

Roles: All users with the standard User role.

Create a Plan

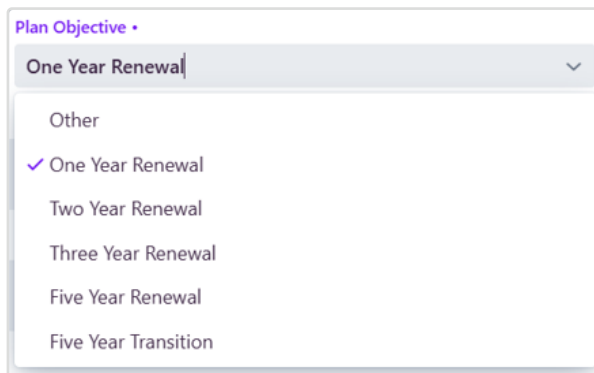
1. From the Plans or Main menu, select “My Plans”
2. Click  . If there is not already an active Plan, the Create option will show at the top of the page.
 - a. If there is already an active plan, the plan will show and there will not be a create option. Users can only have one active plan at a time. Once a plan is “Completed” status, a new plan can be created.
3. Select a Plan Template. Once the template is selected, additional fields will appear based on that template setup.



4. Enter Plan information

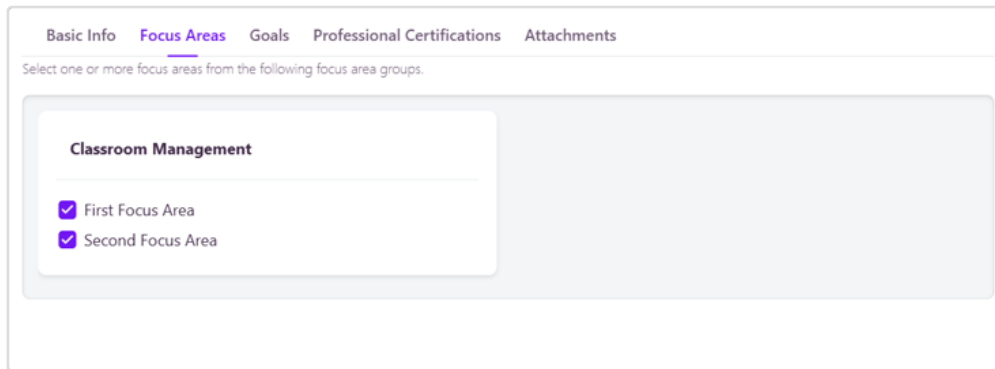
a. **Basic Info**

- i. **Plan Name:** Enter the name of this plan. This may include specific details like the year or certification the plan is intended for.
- ii. **Approving Supervisor:** Select to send this plan to a Supervisor for approval. This field can also be left blank. If blank, it will only be submitted to the Committee for approval.
 1. *This field will only be included if the [Supervisor Configuration](#) is enabled.*
 2. Supervisors will be determined based on the supervisor defined on the USPS Position screen and the [Job Status Configuration](#). If no supervisor is defined on the USPS Position(s), this field will show “No Supervisors found.”
- iii. **Plan Objective:** Select the appropriate objective. Options include One to Five Year Renewal, Five Year Transition, and Other.

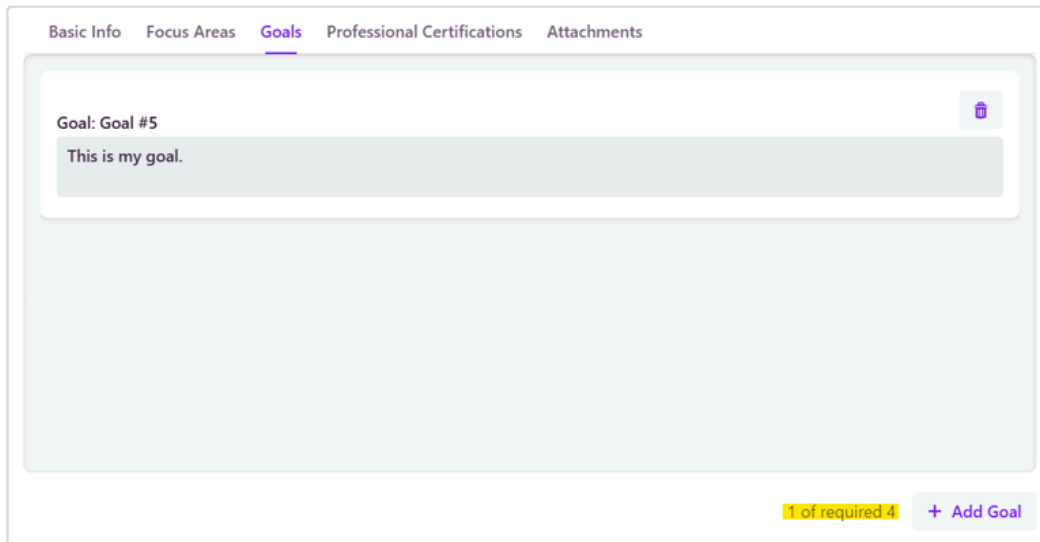


- iv. **Plan Focus:** The label for this field can be customized per template. This can be used to detail the areas the user wants to focus on when seeking professional development opportunities. Maximum of 1000 characters.
 - v. **Comments:** Additional comments can be entered in this field. Maximum of 1000 characters.
- b. **Focus Areas:** The focus areas in this section are determined by the Plan template setup. Select the statements that your plan will meet by clicking on the radial or box next to the statement.
- i. Focus Areas with checkboxes allow multiple selections to be made.

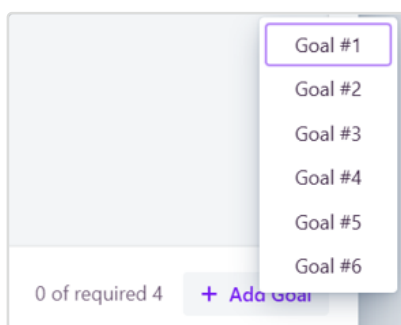
- ii. If the Plan Template selected doesn't have any Focus Areas included, this tab will not appear when entering a plan.




- c. **Goals:** Select and enter goals.



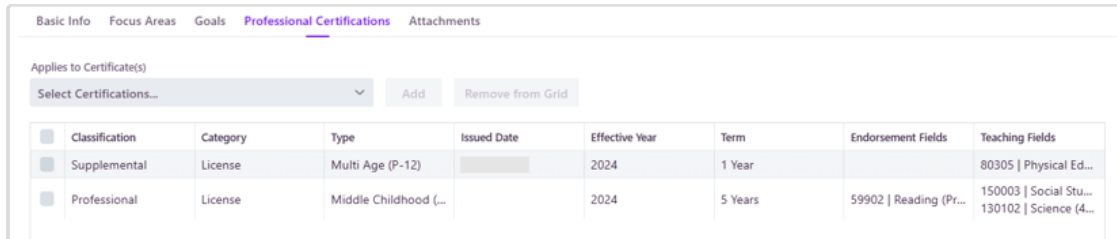
- i. Click [+ Add Goal](#) to add a goal to the Plan.
- ii. This will open a list of all available goal options. The goal options are based on the Plan template. Click on the goal to add it to the plan.



- iii. Enter details for each goal in the designated space. Maximum of 2000 characters. The text for each goal must be unique.

- iv. To remove a goal from the plan click 
- v. The required number of goals is displayed at the bottom next to the Add Goal button. The required number of goals must be added in order to save the plan.

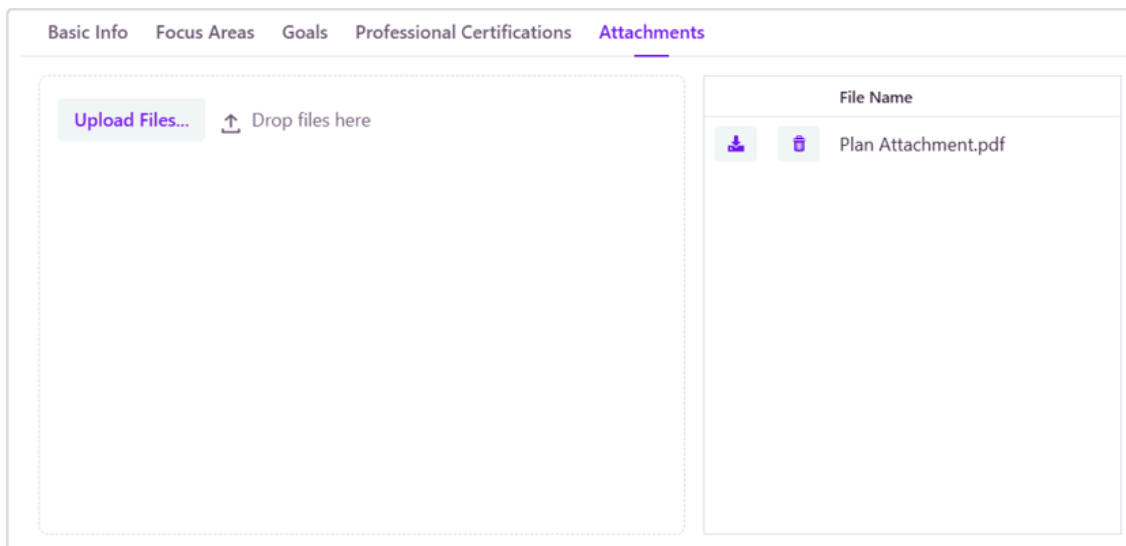
d. Professional Certifications






Classification	Category	Type	Issued Date	Effective Year	Term	Endorsement Fields	Teaching Fields
Supplemental	License	Multi Age (P-12)		2024	1 Year		80305 Physical Ed...
Professional	License	Middle Childhood (...)		2024	5 Years	59902 Reading (Pr...	150003 Social Stu... 130102 Science (4...

- i. **Select Certifications:** Use the dropdown to select the Certification(s) that the plan applies to and click Add. Once added, the Certification details will show in the box below.
 1. Certifications available in the dropdown will only include Issued status Certifications. Expired certifications will not be included.
 2. To remove certifications, use the checkbox to select rows and click Remove from Grid.

e. Attachments



- i. Click  and select a file to upload an attachment (accepted file types include .jpeg, .png, .doc, .pdf, and .txt). Once the file is successfully uploaded, it will show under File Name in the section to the right. Multiple files can be attached and the maximum size is 30 MB.
 1.  Download the attached file
 2.  Delete the attached file

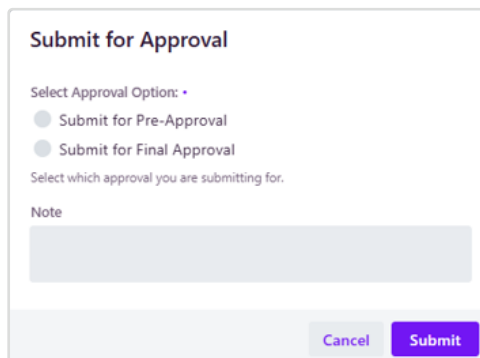
- 5. Click on  to create Plan or  to cancel out of the window without saving changes.

⚠ Fields with character limits will not allow more than the maximum number of characters to be entered. If text is copy and pasted into the field, any characters past the maximum count will be cut off.

Submit a Plan for Approval

Once a plan has been created, it can be submitted for approval.

1. From the Plans or Main menu, select “My Plan”
2. On the Current Plan tab click **Submit for Approval**
3. The **Confirm Submission** window will open. Choose the appropriate option



- a. **Submit for Final Approval:** Submit the activity for final approval.
 - b. **Submit for Pre-Approval:** If the [Preapproval Configuration](#) is enabled, the submission window will show the option to Submit for Pre-Approval.
 - c. **Note:** Notes can be submitted to the approver.
4. Click on **Submit** to confirm the submission of the plan for approval or **Cancel** to cancel out of the window without submitting for approval.

📌 Once a plan has been Submitted for Approval, the Committee and Approving Supervisor fields cannot be modified.

My Plans View Options

The My Plans grid allows the user to search, view, and manage their plans.

Once a plan is entered, the page will show two tabs at the top of the page.



Current Plan

This view shows details of the current active plan.

- Basic Info, Focus Areas, Goals, and Approval Trail tabs can be viewed for the current plan info entered.

- **Approving Supervisor:** This field will only show if [Supervisor Approvals](#) are enabled.
- **Total CEUs:** Total CEUs are calculated based on *approved* Activities for each plan.
 - Activities using Progress Units other than CEU will be converted to CEUs based on the State Board of Education LPDC Professional Development Conversion Chart. Please see the [SBOE LPDC Resources](#).

The screenshot shows a web interface titled "My Plan". At the top, there are tabs for "Current Plan" and "All Plans". Below this, there is a "Plan Template" dropdown menu set to "Pancake Committee Plan Template - Pancake Local LPDC Committee". A navigation bar includes "Basic Info", "Focus Areas", "Goals", and "Approval Trail". The "Basic Info" section contains several fields: "Plan Name" (Kim's 2025 plan), "Approving Supervisor" (rickyanderson - Ricky Anderson), "Plan Objective" (One Year Renewal), "Total CEUs" (3), and "Plan Focus" (This is Kim's plan focus). A "Comments" section at the bottom contains the text "More comments here". In the bottom right corner, there are two buttons: a light blue "Edit" button with a pencil icon and a purple "Submit for Approval" button.

-  Edit the current plan.
 - Certain information cannot be edited like the Professional Certification, Committee, or Approving Supervisor selected for a plan (some dependent on if the plan has been submitted for approval). If non-modifiable fields need to be updated, the current plan should be archived and a new plan created.
-  Submit the plan for approval. See the [Submit for Approval](#) section.

My Plan

Current Plan All Plans

Plan Template •
Maple Leaf Plan - District-wide

Basic Info Focus Areas Goals Professional Certifications Approval Trail

Plan Name •
Blackwell's First Plan

Committee •
Pancake Local LPDC Committee

Approving Supervisor
No supervisors found

Plan Objective •
One Year Renewal

Total CEUs
3.3

Maple Plan Focus •
My focus is to better my education to continue my license.

Comments

Edit Archive

- Archive the current Plan. This option is only available for plans that have received Final Approval and all associated Activities have received Final Approval.

Once a plan has been created, the Plan Template cannot be changed. If a new Plan Template needs to be used, the current plan should be completed and a new plan started.

When viewing the current plan, an additional tab is available to view details of the Approval Trail. This can be used to view approval events, notes, and timestamps.

My Plan

Current Plan All Plans

Plan Template •
Pancake Committee Plan Template - Pancake Local LPDC Committee

Basic Info Focus Areas Goals Approval Trail

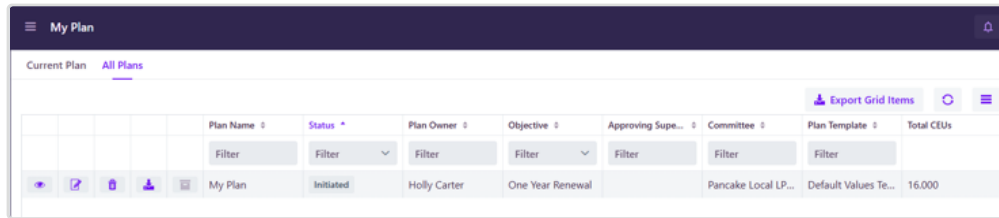
Action	Username	Note	Timestamp
Initiated	sallyhensley		06/11/2025 1:26 PM

All Plans






This view includes a grid where all plans can be viewed.


- **Approving Supervisor:** This field will only show if [Supervisor Approvals](#) are enabled.
- **Total CEUs:** Total CEUs are calculated based on *approved* Activities for each plan.
 - Activities using Progress Units other than CEU will be converted to CEUs based on the State Board of Education LPDC Professional Development Conversion Chart. Please see

the [SBOE LPDC Resources](#).



Plan Name	Status	Plan Owner	Objective	Approving Supe...	Committee	Plan Template	Total CEUs
My Plan	Initiated	Holly Carter	One Year Renewal		Pancake Local LP...	Default Values Te...	16.000

-  View Plan
-  Edit Plan
-  Print Plan-This option will download a printable version of the users plan.
-  Archive/Unarchive-Can archive plan once all activities have been approved. Can unarchive the plan if there are NO other active plans.
-  Delete Plan

 A plan can only be deleted if it has not been submitted for approval (status Initiated) and there are no activities entered for the plan. Archived plans cannot be edited or deleted.

See also, the [More Information](#) section below.

Supervisor Plans

Role: Users with Admin, District Manager, or Supervisor roles.

The Supervisor Plans page allows the user to search and view plans that have been created by users they supervise.

- The Plan Owner column shows which user submitted the Plan.
- Total CEUs are calculated based on *approved* Activities for each plan.
 - Activities using Progress Units other than CEU will be converted to CEUs based on the State Board of Education LPDC Professional Development Conversion Chart. Please see the [SBOE LPDC Resources](#).
 - Supervisors are determined by the Supervisor field on the USPS Position record. In order to view entries on the Supervisor Plans grid, the logged in user must be set as another user's Supervisor on their USPS position *and* have one of the roles above.
 - Supervisors will see all plans for all users that they are set as Supervisor on the USPS record.

Plan Name	Status	Plan Owner	Objective	Approving Supervisor	Committee	Plan Template	Total CEUs
Kim's 2025 plan	Initiated	Kim Ellison	One Year Renewal	Ricky Anderson	Pancake Local LPDC...	Pancake Committee...	3,000
My New Plan	Initiated	Sally Hensley	One Year Renewal		Pancake Local LPDC...	Pancake Committee...	0

- View Plan

See also, the [More Information](#) section below.

District Plans

The District Plans grid allows the user to search and view plans that have been created. This grid will show all plans created for the district.



- The Plan Owner column shows which user submitted the Plan.
- Effective Date is an optional field available to enter an effective date. This can only be modified by users with access to the District Plan View for plans that are not Archived or Denied status. **When a Plan includes an effective date, only activities with a start date after the effective date can be approved.**
- Total CEUs are calculated based on *approved* Activities for each plan.
 - Activities using Progress Units other than CEU will be converted to CEUs based on the State Board of Education LPDC Professional Development Conversion Chart. Please see the [SBOE LPDC Resources](#).
- Note: Initiated Plans must be approved in the [Approval menu](#) grid.

Role: Users with Admin, Committee Member, or District Manager roles.

Plan Name	Status	Plan Owner	Objective	Approving Supervisor	Committee	Plan Template	Total CEUs
Test Plan 1	Initiated	Administrator ...	One Year Rene...		Pancake Local ...	Pancake Com...	0
Blackwell Plan 2026-2028	Initiated	Thomas Black...	Two Year Rene...	Ricky Anderson	Pancake Local ...	Pancake Com...	0
My Plan	Initiated	Holly Carter	One Year Rene...		Pancake Local ...	Default Values ...	16,000
Josh's Plan	Submitted for Pre-Approval	Josh Arnold	Five Year Rene...	Ricky Anderson	Pancake Local ...	Pancake Com...	0
Rocky's Plan 1	Submitted for Final Approval	Rocky Alexander	Five Year Rene...	Ricky Anderson	Pancake Local ...	Maple Leaf Plan	0
Ricky's Plan	Submitted for Final Approval	Ricky Anderson	Two Year Rene...		Pancake Local ...	Maple Leaf Plan	0
test	Approved	Brandy French	One Year Rene...		Pancake Local ...	Pancake Com...	0
Kim's 2025 plan	Approved	Kim Ellison	One Year Rene...	Ricky Anderson	Pancake Local ...	Pancake Com...	3,400
My New Plan	Approved	Sally Hensley	One Year Rene...	Ricky Anderson	Pancake Local ...	Pancake Com...	0,800
Blackwell's Plan 2025-2030	Archived	Thomas Black...	Five Year Rene...	Ricky Anderson	Maple Tree Co...	Maple Tree Pla...	3,000
Blackwell's Plan A2	Archived	Thomas Black...	Two Year Rene...	Ricky Anderson	Pancake Local ...	Test Plan Temp...	0,300

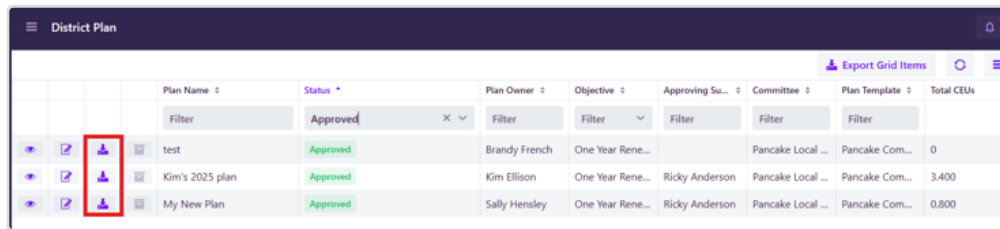
- View Plan
- Edit Plan - This option is *only* available for Approved status plans. When editing through the District Plans view, **only the Professional Certifications can be modified.** Other edits can

be made by the user the plan belongs to.

-  Print Plan-This option will download a printable version of the users plan.
-  Archive/Unarchive-Can archive plan once all activities have been approved. Can unarchive the plan if there are NO other active plans.

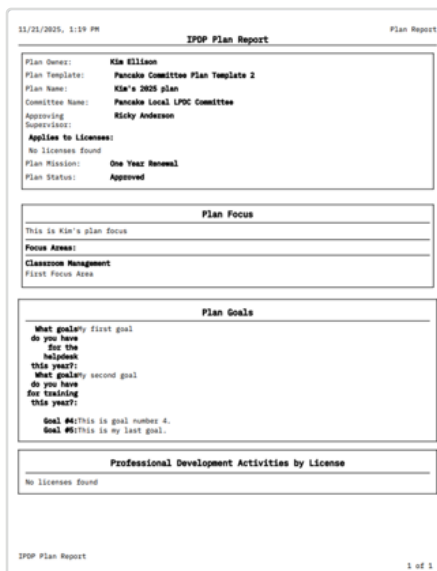
Print Plan

By clicking on the download icon, a printed version of the Plan along with activities can be printed for the user. In the activities section, only those activities that are approved will be included and calculated into the CEU total.



Plan Name	Status	Plan Owner	Objective	Approving Su...	Committee	Plan Template	Total CEUs
test	Approved	Brandy French	One Year Rene...		Pancake Local ...	Pancake Com...	0
Kim's 2025 plan	Approved	Kim Ellison	One Year Rene...	Ricky Anderson	Pancake Local ...	Pancake Com...	3.400
My New Plan	Approved	Sally Hensley	One Year Rene...	Ricky Anderson	Pancake Local ...	Pancake Com...	0.800

The report will include plan information, Plan Focus, Plan Goals and Activities by License.



11/21/2025, 1:19 PM IPDP Plan Report Plan Report

Plan Owner: **Kim Ellison**
Plan Template: **Pancake Committee Plan Template 2**
Plan Name: **Kim's 2025 plan**
Committee Name: **Pancake Local LPDC Committee**
Approving Supervisor: **Ricky Anderson**
Apply to Licenses: **No Licenses Found**
Plan Mission: **One Year Renewal**
Plan Status: **Approved**

Plan Focus
This is Kim's plan focus
Focus Areas:
Classroom Management
First Focus Area

Plan Goals
What goal(s) first goal do you have for the helpdesk this year?
What goal(s) second goal do you have for training this year?
Goal #4: this is goal number 4.
Goal #6: this is my last goal.

Professional Development Activities by License
No licenses found

IPDP Plan Report 1 of 1

Export Plans

CSV export is available from the various Plan views. Click on the Export Grid Items at the top of the grid. All filters will pertain to the export. For example if the grid is filtered for 'returned for modification' plans those will be the only ones on the export.

Plan Name	Status	Plan Owner	Objective	Approving Su...	Committee	Plan Template	Total CEUs
Test Plan 1	Initiated	Administrator ...	One Year Rene...		Pancake Local ...	Pancake Com...	0
Blackwell Plan 2026-2028	Initiated	Thomas Black...	Two Year Rene...	Ricky Anderson	Pancake Local ...	Pancake Com...	0
My Plan	Initiated	Holly Carter	One Year Rene...		Pancake Local ...	Default Values ...	16,000
Josh's Plan	Submitted for Pre-Approval	Josh Arnold	Five Year Rene...	Ricky Anderson	Pancake Local ...	Pancake Com...	0
Rocky's Plan 1	Submitted for Final Approval	Rocky Alexander	Five Year Rene...	Ricky Anderson	Pancake Local ...	Maple Leaf Plan	0

Example of CSV

Plan ID	Plan Name	Status	Owner	Committee	Template	Supervisor	Objective	Other Obj/Focus	Certifications	Total CEUs	Comments
3666e340-14ec-4031-be49-c27e2bd31f1e9	Test Plan 1	INITIATED	Administrator Account	Pancake Local LPDC Committee	Plan Template 2		ONE_YEAR_RENEWAL	This is the focus for my first test plan. I'm going to focus on entering this plan so we can see an example of what it will look like to have a plan entered.			If I had any additional comments, I would enter them in this section. This is where comments v
a684034a-d137-4948-85e4-7e8a8b4f768	My Plan	INITIATED	Holly Carter	Pancake Local LPDC Committee	Default Values Template		ONE_YEAR_RENEWAL	My plan for my 2025 renewal.		16	This is where I'd enter my comments.
b70564ad-e682-49a4-81e3-fdea8aa37976	Josh's Plan	SUBMITTED_PREAPPROVAL	Josh Arnold	Pancake Local LPDC Committee	Plan Template 2	Ricky Anderson	FIVE_YEAR_RENEWAL	Renew my 5 year teaching license.			
8eb76107-60ee-4134-8ca0-f9ddc1f93b1	Rocky's Plan 1	SUBMITTED_FINAL	Rocky Alexander	Pancake Local LPDC Committee	Maple Leaf Plan	Ricky Anderson	FIVE_YEAR_RENEWAL	Renew my 5 year license. Take the classes needed to further my education.			
96dd13aa-a9f1-4b3f-aaec-73a1aded8ace	Ricky's Plan	SUBMITTED_FINAL	Ricky Anderson	Pancake Local LPDC Committee	Maple Leaf Plan		TWO_YEAR_RENEWAL	Renew my license			

See also, the [More Information](#) section below.

Plan Templates

Plan Templates can be used to create templates that will be used when entering a Plan. This determines headers, goals, and focus areas that will show when a plan is created.

Roles: Users with District Manager or Admin roles.

Create Plan Template

- From the Plans menu, select "Plan Templates "
- Click [+ Create](#)
- Enter Plan Template information
 - Template Label:** Required field. Will be used for the name of the template.
Example: District Template
 - Plan Focus Label:** This label will determine the description of the Plan Focus field. If left blank this would default to Focus.
Example: Describe your long-term educational goals.
 - Active:** If this box is checked, the Plan Template will be active and available to use when creating new Plans. If unchecked, it will be inactive and unavailable to be used.
 - Specific Committee:** If the template is to be used for the entire district then Districtwide can be selected (default). If the template should be assigned to a specific committee, select a committee from the drop down list. The committees available are determined on the [Committees](#) page.

e. **Minimum/Maximum Goals:** Use the +/- to increase or decrease the number of goals to be included in the Plan Template. *Maximum of 20.* Users will be required to complete the minimum number of goals when creating a plan. The Goal Labels in the next section will increase or decrease based on the maximum number of goals selected.

The screenshot shows a 'Plan Template' configuration form. At the top, there is a 'Template Label' dropdown menu set to 'District Template'. Below that is a 'Plan Focus Label' field containing the text 'Describe your long-term education goals' and a checked 'Active' checkbox. Underneath is a 'Specific Committee' dropdown menu set to 'District-wide'. To the right of this are two goal count controls: 'Minimum Goals' set to 2 and 'Maximum Goals' set to 3, both with minus and plus buttons for adjustment.

f. **Goal Labels:** The goal labels will be used as the header or description for each goal field on the Plan. If left unchanged, they will default to Goal #1, Goal #2, etc.




The screenshot shows the 'Goal Labels' configuration section. It features three input fields for 'Goal #1 label', 'Goal #2 label', and 'Goal #3 label'. The first two fields contain the default text 'Goal #1' and 'Goal #2' respectively, while the third field is empty.

g. **Focus Area Groups:** The focus area groups allow for adding focus areas or domains to the template. If no Focus Areas are entered for a Plan Template, the Focus Areas tab will not display on Plans entered using that template.



Examples: Classroom Management, Content Acquisition, and Technology Integration


- i. Click **+ Add Group** to begin adding a focus area group
- ii. Enter the group description. *Max 500 characters.*
- iii. Click **+ Add Focus Area** to add a focus area to the group. Rows for multiple focus areas can be added at once
- iv. Enter focus area descriptions. *Max 2000 characters.*

The screenshot shows the 'Focus Area Groups' configuration section. It has a 'Group Name' field with a dropdown arrow, currently showing 'Classroom Management'. Below this is a 'Group Description' field containing the text 'Classroom Management'. A section titled 'DRAG AND DROP TO REARRANGE' contains two 'Focus Area' entries, each with a hamburger menu icon on the left and a close 'x' button on the right. The first is labeled 'First Focus Area' and the second 'Second Focus Area'. At the bottom right of this section is a '+ Add Focus Area' button. At the bottom of the entire section are two buttons: '+ Add Group' and '- Remove Selected Groups'.

- v. Each Group can be expanded or collapsed using the arrow  next to the Group Name
- vi. Use  to add additional Focus Area Groups or check the box to select a group and use  to remove a group

























4. Click on  to create Plan Template or  to cancel out of the window without saving changes.


 You must have at least one goal or one focus area on a Plan Template.

Plan Templates Grid Options

The Plan Templates grid allows the user to search, view, and manage Plan Templates that have been created.

Plan Templates									
+ Create  									
			Label ^	Specific Committee ^	Min. Goals ^	Max. Goals ^	Active ^		
			Filter	Filter	Filter	Filter	Filter		
					Default Values Template	District-wide	3	3	false
					Maple Leaf Plan	District-wide	1	3	true
					Maple Tree Plan A	Maple Tree Committee	3	4	true
					Pancake Committee Plan Template	Pancake Local LPDC ...	2	6	true

-  View Plan Template
-  Edit Plan Template
-  Copy Plan Template-can copy the template and make changes to template, goals, groups, and options PRIOR to saving.
-  Print a Report showing the details of the Plan Template

 When editing a Plan Template, new focus areas can be added but previous focus areas cannot be removed. When adding new focus areas the options can be modified during the initial create/edit process of those options. Once saved, options cannot be modified if edited again.

Plan Template Report Example

Plan Template Report

Template Label: Pancake Committee Plan Template

Plan Focus Label:

Active: Yes

Committee Name: Pancake Local LPDC Committee

Minimum Goals: 2 **Maximum Goals:** 6

Goals

Goal #1: What primary goals do you have for education this year?
Goal #2: What secondary goals do you have for education this year?
Goal #3: What primary goals do you have for training this year?
Goal #4: What secondary goals do you have for training this year?
Goal #5: What primary goals do you have for improving your skills this year?
Goal #6: What secondary goals do you have for improving your skills this year?

Focus Areas

Focus Area Group: Classroom Management

- First Focus Area
- Second Focus Area

Activate/Inactivate Plan Templates

The Plan Templates can be activated or inactivated in groups using the first column of the grid to select. Rows can be individually selected with each checkbox, or the box in the top row can be used to select all.

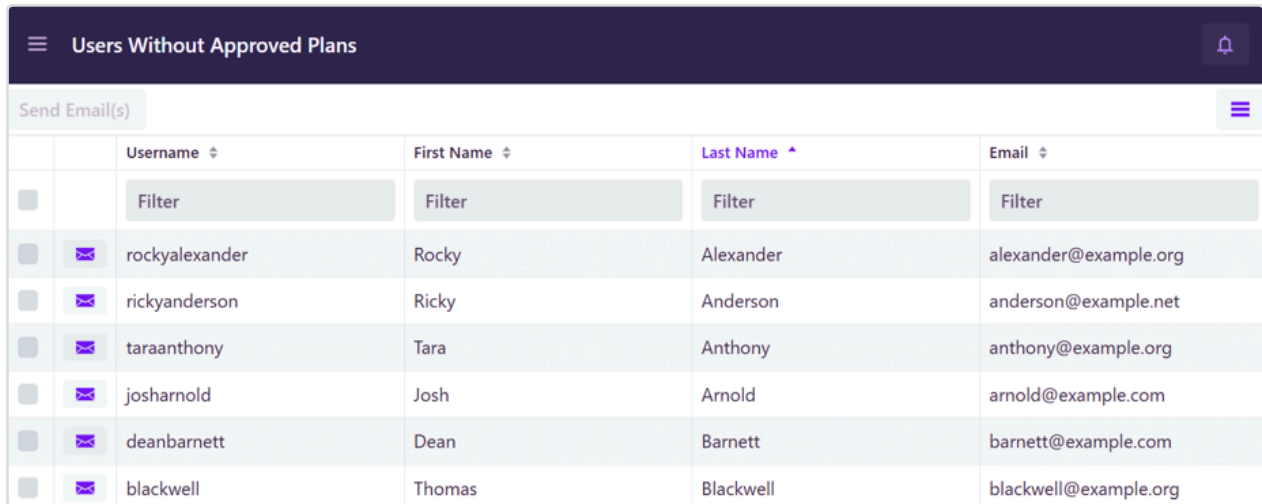
Plan Templates						
+ Create Make Inactive Make Active						
	Label ^	Specific Committee ^	Min. Goals ^	Max. Goals ^	Active ^	
<input checked="" type="checkbox"/>	Filter	Filter	Filter	Filter	Filter	
<input checked="" type="checkbox"/>	Default Values Template	District-wide	3	3	false	
<input checked="" type="checkbox"/>	Maple Leaf Plan	District-wide	1	3	true	
<input checked="" type="checkbox"/>	Maple Tree Plan A	Maple Tree Committee	3	4	true	
<input checked="" type="checkbox"/>	Pancake Committee Plan Template	Pancake Local LPDC ...	2	6	true	

Once records are selected, the options for Make Inactive or Make Active will become available at the top of the grid.


- **Make Inactive** Mark all selected records inactive. If a option group is already marked as inactive, it will remain inactive.
- **Make Active** Mark all selected records active. If a option group is already marked as active, it will remain active.

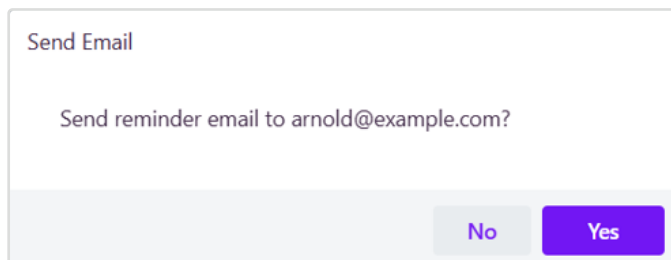
Users Without Approved Plans

This page displays a list of users that do not have an approved plan. This grid can be sorted or filtered to view basic user information (name, username, email). Only users that are enabled on the Users grid will be included.



		Username	First Name	Last Name	Email
<input type="checkbox"/>		Filter	Filter	Filter	Filter
<input type="checkbox"/>		rockyalexander	Rocky	Alexander	alexander@example.org
<input type="checkbox"/>		rickyanderson	Ricky	Anderson	anderson@example.net
<input type="checkbox"/>		taraanthony	Tara	Anthony	anthony@example.org
<input type="checkbox"/>		josharnold	Josh	Arnold	arnold@example.com
<input type="checkbox"/>		deanbarnett	Dean	Barnett	barnett@example.com
<input type="checkbox"/>		blackwell	Thomas	Blackwell	blackwell@example.org

- Use the  email icon to send a notification to an individual user on the grid. A pop up message will display to confirm sending the reminder email. Click **Yes** to send the email. Click **No** to cancel.

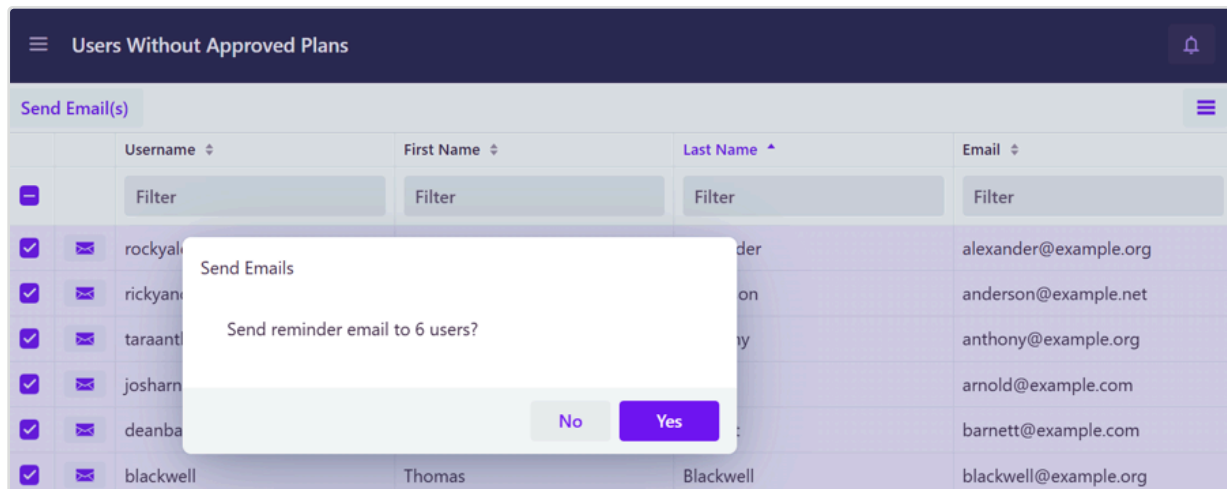


Send Email

Send reminder email to arnold@example.com?

No **Yes**

- Use the selection box on the grid to select multiple users for email reminders. Use the selection box at the top of the grid to select all. Once selected, use the **Send Email(s)** button to send emails to all selections. A pop up message will display to confirm the number of users that will receive the reminder email. Click **Yes** to send the email. Click **No** to cancel.




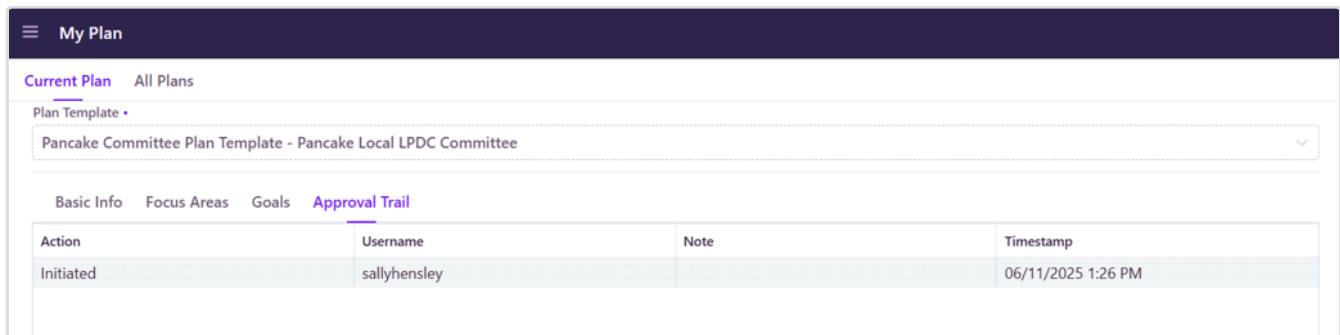
		Username	First Name	Last Name	Email
<input type="checkbox"/>		Filter	Filter	Filter	Filter
<input checked="" type="checkbox"/>		rockyalexander	Rocky	Alexander	alexander@example.org
<input checked="" type="checkbox"/>		rickyanderson	Ricky	Anderson	anderson@example.net
<input checked="" type="checkbox"/>		taraanthony	Tara	Anthony	anthony@example.org
<input checked="" type="checkbox"/>		josharnold	Josh	Arnold	arnold@example.com
<input checked="" type="checkbox"/>		deanbarnett	Dean	Barnett	barnett@example.com
<input checked="" type="checkbox"/>		blackwell	Thomas	Blackwell	blackwell@example.org

- There are three different email types - No Plan has been created, Plan has been created but not submitted, Plan has been returned for Modification. Depending on Plan activity by each user, they will receive the appropriate email type.
 - The Subject and Body of these email types can be customized in the [Plan Reminder Email Configuration](#).

More Information

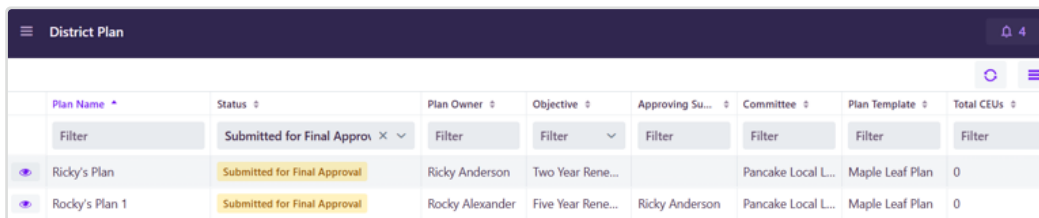
Viewing the Approval Trail

When viewing the plan , an additional tab is available to view details of the Approval Trail. This can be used to view approval events, notes, and timestamps.



Plan Approval Statuses


The Approval Trail on each Plan includes an “Action” which is also called “Status” on the Current Plans grid, Supervisor Plans grid, and District Plans grid. This can be used to filter plans for easy viewing.



When clicking on the filter, the dropdown will include the following statuses to choose from.


Status	Description
Initiated	The plan has been created but it has not yet been submitted for approval.
Submitted for Pre-Approval	The plan has been submitted for pre-approval. This will only be available when the Preapproval Configuration is enabled.

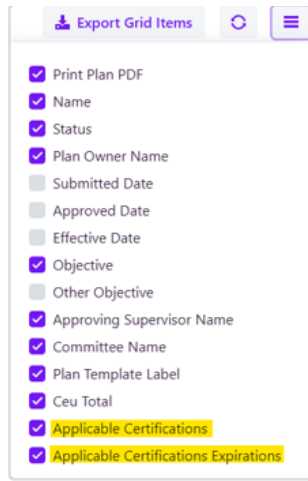
Submitted for Final Approval	The plan has been submitted for final approval.
Supervisor Pre-Approved	The plan has been pre-approved by the Supervisor. The Committee can still pre-approve this plan.
Supervisor Approved	The plan has been approved by the Supervisor. The Committee can still approve this plan.
Pre-Approved	The plan has been pre-approved. This will only be available when the Preapproval Configuration is enabled. The plan can still be submitted for final approval.
Approved	The plan has been approved.
Returned for Modification	The plan was returned for modification. The plan can be edited and resubmitted for approval.
Archived	The plan and all associated activities have been archived.
Denied	The plan was denied and cannot be modified or resubmitted for approval.

 The grid will sort in the following order when entering the Plan screen:

- Initiated
- Returned for Modification
- Submitted for Pre-Approval
- Submitted for Final Approval
- Supervisor Pre-Approved
- Supervisor Approved
- Pre-Approved
- Approved
- Archived
- Denied

Applicable Certifications & Applicable Certifications Expirations

Applicable Certifications and Expiration Dates are available to add to the Plan grids. Use the  icon to add these columns to the grid.



The Certifications that will appear in this column are specific to the Certifications that were selected on the Professional Certifications tab when the Plan was created. Use the [Professional Certifications](#) pages to see all Certifications for an employee. When these columns appear on the grid, they will include all licenses selected for the plan in each row. Expiration dates will appear in the same order as the licenses appear.

Applicable Certifications	Certification Expirations
Filter	Filter start Filter stop
2025 - Intervention Specialist (K-12) Professional License	06/30/2030
2025 - Intervention Specialist (K-12) Professional License	06/30/2030
2025 - Adolescence to Young Adult (7-12) Professional License	06/30/2030
2023 - Primary (P-5) Professional License	06/30/2028
2022 - Intervention Specialist (K-12) Professional License	06/30/2027
2020 - Education Of The Handicapped (K-12) Professional License	06/30/2025
2025 - Intervention Specialist (K-12) Professional License	06/30/2030
2025 - Education Of The Handicapped (K-12) Professional License	06/30/2030
2020 - Intervention Specialist (K-12) Professional License	06/30/2025