

# Activities


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
## My Activities

The My Activities page allows the user to view and enter their activities.

**Roles:** All users with the standard User role.

### Create an Activity

 Users must have an *Approved* Plan in order to create an activity. If there is not currently an Approved Plan, the Create button will not be available on the My Activities page.

1. From the Activities menu, select “My Activities”
  2. Click 
  3. Enter Activity information
    - a. Basic Info
-

i. **Plan Name:** Shows the current active plan.

ii. **Activity Name:** Enter the name of the activity.

iii. **Approval Status:** This is a read-only field that will be used to track the progress of the activity approval.

iv. **Start/End Dates:** Enter the begin and end date of the activity.

v. **Approving Supervisor:** Select to send this activity 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 available to select from the drop down list 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.”

vi. **Description:** Enter the description of the activity. *Maximum 1000 characters.*

vii. **Focus:** Describe how this activity fits with the focus of your plan. *Maximum 1000 characters.*

b. **Progress**

**Activity**

Plan Name  
My Plan

Basic Info **Progress** Option Groups Professional Certifications Attachments

Progress Unit: •  
Contact Hours

Progress Value: •  
3

Vendor:  
[Empty field]

Verification Method: •  
Agenda

Comments:  
[Large text area]

Cancel Create

- i. **Progress Unit:** Choose the unit type for the credit earned for this activity.
- ii. **Progress Value:** Enter the number of units earned for this activity. Values can be entered to three decimals.
- iii. **Vendor:** Enter the vendor/sponsor of the meeting if applicable.
- iv. **Verification Method:** Choose a method by which the activity could be verified. The verification methods available in this drop down must be entered and active on the [Activity Verification Methods](#) page.

Verification Method: •

- Transcript
- Agenda
- Brochure
- Certificate
- Outline
- Activity Log

- v. **Comments:** Enter any comments for this activity. Maximum 1000 characters.

**c. Options Groups**

*This tab will only show if there are active Activity Option Groups.*

**Activity**

Plan Name  
My Plan

Basic Info Progress **Option Groups** Professional Certifications Attachments

Activity Type Multi

- Option 1 - This is the first activity option
- Option 2 - This is the second activity option
- Option 3 - This is the third option

Course Type 2

- College - College
- Professional - Professional

Another Activity

- None
- Department Meeting - Meeting
- School Inservice - Inservice

Cancel Create

i. **Activity Options:** Select the applicable Activity options from the available selections. Activity Options are determined by options that are created and active on the [Activity Options Groups](#) page.

d. **Professional Certifications**

Applies to Certificate(s)

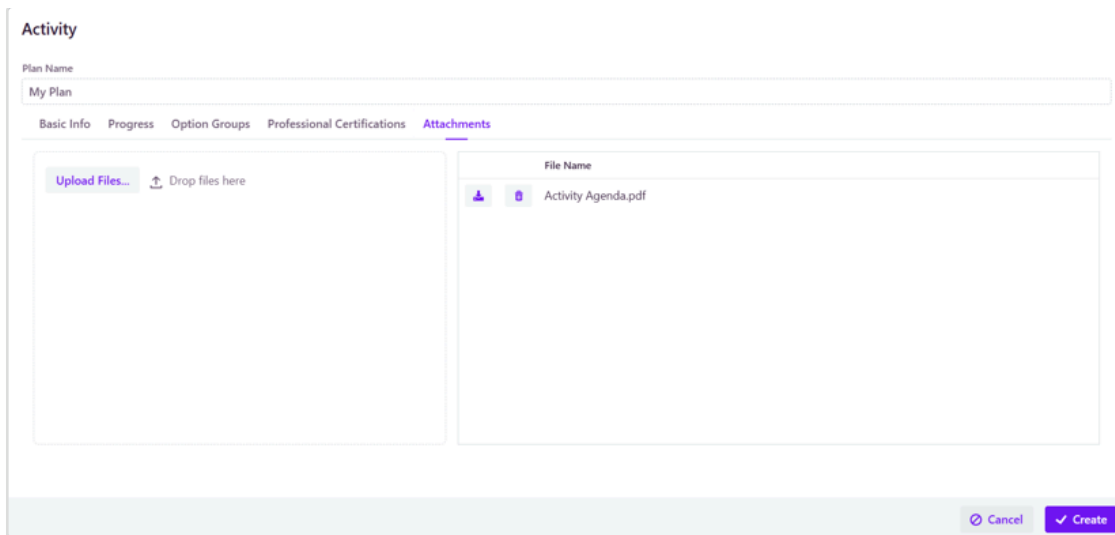
Select Certifications... Add Remove from Grid

<input type="checkbox"/>	Classification	Category	Type	Issued Date	Effective Year	Term	Endorsement Fields	Teaching Fields
<input type="checkbox"/>	Supplemental	License	Multi Age (P-12)		2024	1 Year		80305   Physical Ed...
<input type="checkbox"/>	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 activity applies to and click Add. Once added, the Certification details will show in the box below.

1. Certifications available in the dropdown will be determined by the Certifications selected when creating the Plan.
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. Attachments can be loaded onto activities in all status' except for the status of Denied or Archived.

1. Download the attached file
2. Delete the attached file

4. Click on to create Activity 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 an Activity for Approval

Once an activity has been created, it can be submitted for approval.

1. From the Activities or Main menu, select “My Activities”
2. Locate the Activity on the grid and click to view
  - a. If the activity has just been created, the activity view will remain open and this step can be skipped.
3. Click
4. The **Confirm Submission** window will open. Choose the appropriate option

### Submit for Approval

Select Approval Option: •

Submit for Pre-Approval

Submit for Final Approval

Select which approval you are submitting for.

Note

Cancel
Submit

- 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.
5. Click on Submit to confirm the submission of the activity for approval or Cancel to cancel out of the window without submitting for approval.

## My Activities Grid Options

The My Activities grid allows the user to search, view, and manage their activities. The filters along the top row can be used to sort or filter by each column.

My Activity							
Plan Name	Name	Start Date	End Date	Approval Status			
Filter	Filter	Filter start	Filter stop	Filter start	Filter stop	Filter	
Kim's 2025 plan	Activity 4	2025-07-10	2025-07-10	Initiated			
Kim's 2025 plan	Activity Backdated	2025-01-01	2025-01-01	Initiated			
Kim's 2025 plan	My first activity	2025-06-16	2025-06-16	Submitted for Pre-Approval			
Kim's 2025 plan	New Activity	2025-09-17	2025-09-17	Submitted for Final Approval			
Kim's 2025 plan	Activity 3	2025-07-09	2025-07-09	Submitted for Final Approval			
Kim's 2025 plan	OEDSA Conference	2025-09-18	2025-09-18	Pre-Approved			
Kim's 2025 plan	Test Activity	2025-10-01	2025-10-01	Approved			
Kim's 2025 plan	Learning Lab	2025-09-12	2025-09-12	Approved			
Kim's 2025 plan	New Activity	2025-06-09	2025-06-09	Approved			

- View Activity
- Edit Activity
- Delete Activity
- Cancel Activity allows for the activity to be cancelled at any stage prior to Approval.

District Manager, Supervisor, Admin, Committee Member or Owner may cancel the activity and it will be logged in the approval trail.

- [Export Grid Items](#) Export Grid Items allows a .csv file to be created based on the filters used on the View District Leave Grid. It will produce a file named activity-export.csv.

☰ An activity can only be edited if the status is Initiated or Returned. Activities in Preapproved status can be edited to add attachments only. An activity can only be deleted if the status is Initiated (has not been submitted for approval).

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

## Supervisor Activities

The Supervisor Activities page allows the user to search and view activities that have been created by users they supervise. The Plan Owner column shows which user submitted the Plan.

- Supervisors are determined by the Supervisor field on the USPS Position record. In order to view entries on the Supervisor Activities grid, the logged in user must be set as another user's Supervisor on their USPS position *and* have one of the roles below.
- Supervisors will see all activities for all users that they are set as Supervisor on the USPS record.

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

Plan Name	Name	Start Date	End Date	Approval Status	Plan Owner
Kim's 2025 plan	Activity 4	2025-07-10	2025-07-10	Initiated	Kim Ellison
Kim's 2025 plan	Activity Backdated	2025-01-01	2025-01-01	Initiated	Kim Ellison
Kim's 2025 plan	My first activity	2025-06-16	2025-06-16	Submitted for Pre-Approval	Kim Ellison
My New Plan	Course Activity	2025-06-05	2025-06-05	Submitted for Pre-Approval	Sally Hensley
Kim's 2025 plan	New Activity	2025-09-17	2025-09-17	Submitted for Final Approval	Kim Ellison
My New Plan	Teaching Conference	2025-07-16	2025-07-16	Submitted for Final Approval	Sally Hensley
Rocky's Plan 1	Activity #1	2025-07-14	2025-07-14	Submitted for Final Approval	Rocky Alexander
Kim's 2025 plan	Activity 3	2025-07-09	2025-07-09	Submitted for Final Approval	Kim Ellison
My New Plan	Activity 1	2025-06-01	2025-06-01	Submitted for Final Approval	Sally Hensley
Kim's 2025 plan	OEDSA Conference	2025-09-18	2025-09-18	Pre-Approved	Kim Ellison
Kim's 2025 plan	Test Activity	2025-10-01	2025-10-01	Approved	Kim Ellison

- View Plan
- Cancel Activity allows for the activity to be cancelled at any stage prior to Approval. District Manager, Supervisor, Admin, Committee Member or Owner may cancel the activity

and it will be logged in the approval trail.

- [Export Grid Items](#) Export Grid Items allows a .csv file to be created based on the filters used on the View District Leave Grid. It will produce a file named activity-export.csv.

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

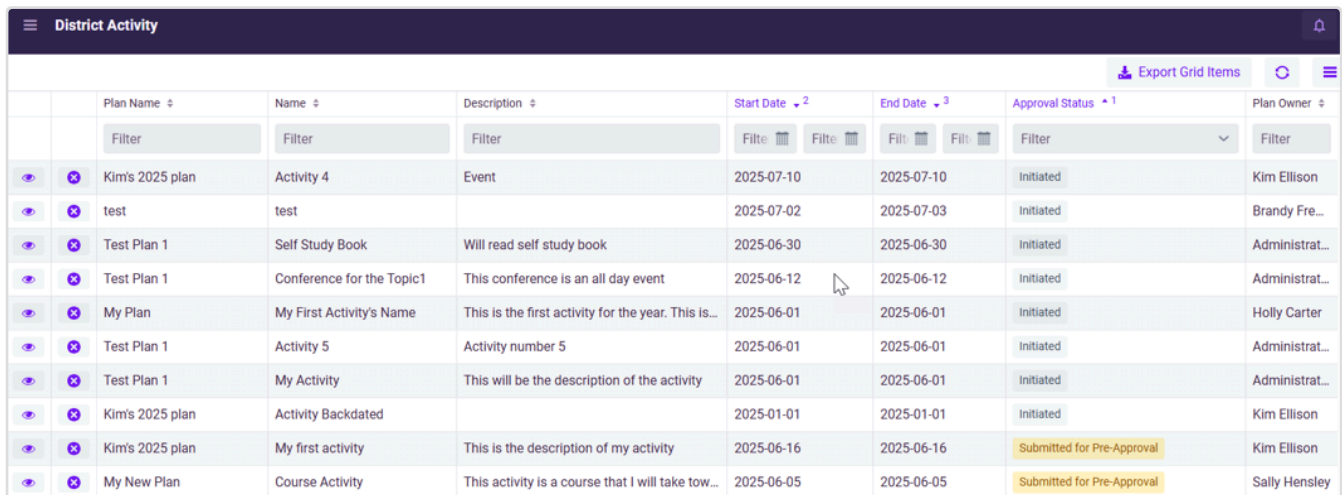
## District Activities

The District Activities page can be used by managing users to view activities entered by other users.

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

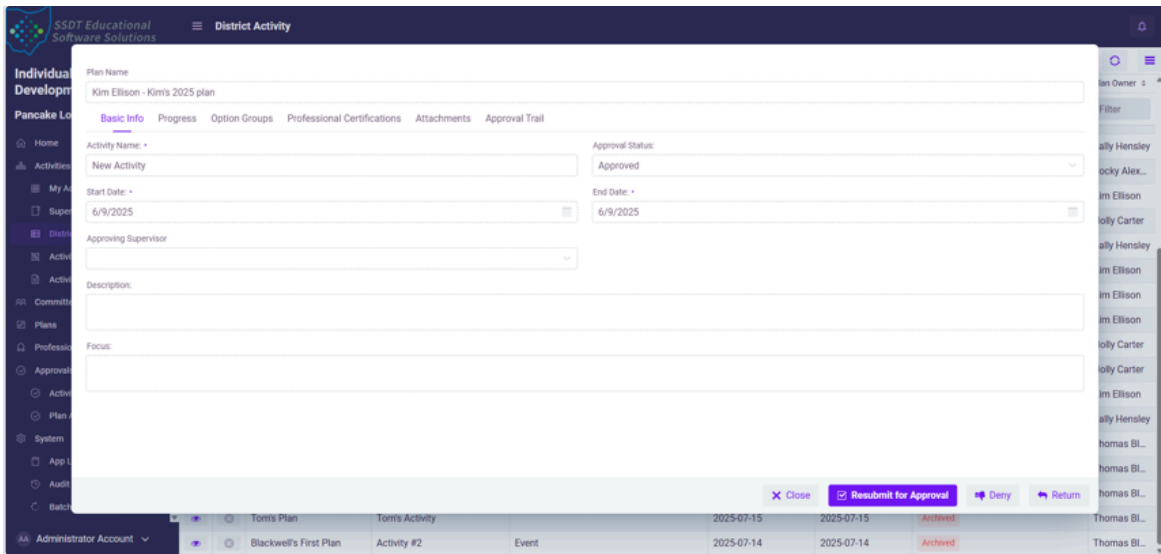
The District Activities grid allows the user to search, view, and manage activities that have been created.

Note: Initiated Activities must be approved in the [Approval menu](#) grid.

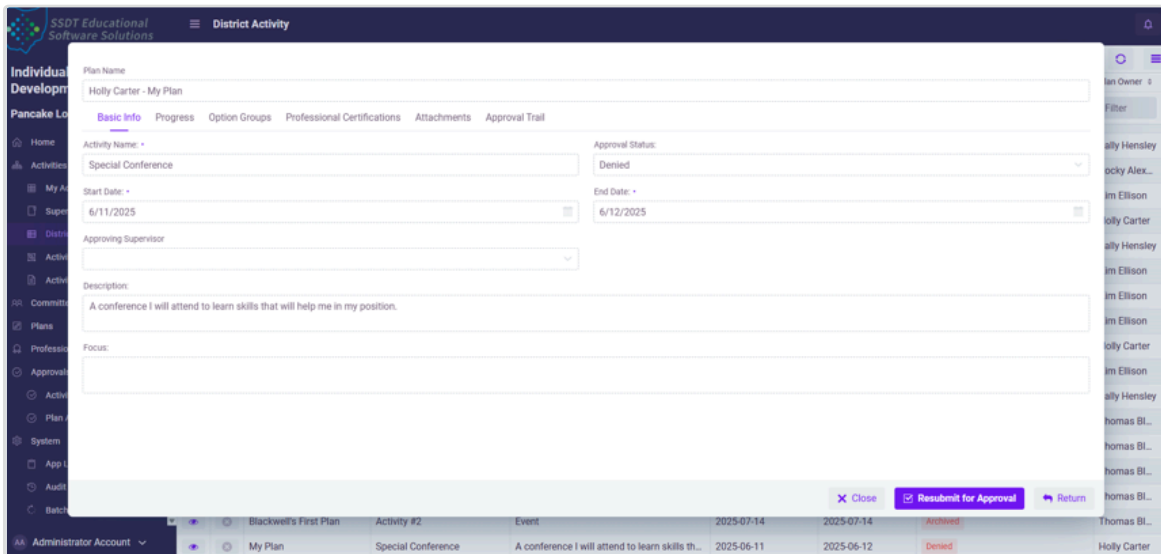


	Plan Name	Name	Description	Start Date	End Date	Approval Status	Plan Owner	
	Filter	Filter	Filter	Filter	Filter	Filter	Filter	
		Kim's 2025 plan	Activity 4	Event	2025-07-10	2025-07-10	Initiated	Kim Ellison
		test	test		2025-07-02	2025-07-03	Initiated	Brandy Fre...
		Test Plan 1	Self Study Book	Will read self study book	2025-06-30	2025-06-30	Initiated	Administrat...
		Test Plan 1	Conference for the Topic1	This conference is an all day event	2025-06-12	2025-06-12	Initiated	Administrat...
		My Plan	My First Activity's Name	This is the first activity for the year. This is...	2025-06-01	2025-06-01	Initiated	Holly Carter
		Test Plan 1	Activity 5	Activity number 5	2025-06-01	2025-06-01	Initiated	Administrat...
		Test Plan 1	My Activity	This will be the description of the activity	2025-06-01	2025-06-01	Initiated	Administrat...
		Kim's 2025 plan	Activity Backdated		2025-01-01	2025-01-01	Initiated	Kim Ellison
		Kim's 2025 plan	My first activity	This is the description of my activity	2025-06-16	2025-06-16	Submitted for Pre-Approval	Kim Ellison
		My New Plan	Course Activity	This activity is a course that I will take tow...	2025-06-05	2025-06-05	Submitted for Pre-Approval	Sally Hensley

- View Activity-allows all activities for the district to be viewed
  - Updating Approved Activity Status can be accessed by clicking on the view icon
  - Those with District Activity view can make these status updates when an activity is in an approved or denied status. These changes will be logged in the Approval Trail.
  - When the activity is in an Approved status, it can be changed back to 'Submitted for Approval', 'Denied' or 'Returned'



- When the activity is in a Denied status; it can be changed to Approved or Returned for Modification Approval Trail



- Approval Trail

Plan Name			
Holly Carter - My Plan			
Basic Info Progress Option Groups Professional Certifications Attachments Approval Trail			
Action	User	Note	Timestamp
Initiated	hollycarter - Holly Carter		06/30/2025 11:37 AM
Submitted for Final Approval	hollycarter - Holly Carter		06/30/2025 11:45 AM
Approved	testcarter - Charles Carter		06/30/2025 12:00 PM
Denied	admin - Administrator Account	need to change activity for testing	03/02/2026 10:15 AM
Returned for Modification	admin - Administrator Account		03/02/2026 10:25 AM

- ❌ Cancel Activity allows for the activity to be cancelled at any stage prior to Approval. District Manager, Supervisor, Admin, Committee Member or Owner may cancel the activity and it will be logged in the approval trail.

- [Export Grid Items](#) Export Grid Items allows a .csv file to be created based on the filters used on the View District Leave Grid. It will produce a file named activity-export.csv.

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

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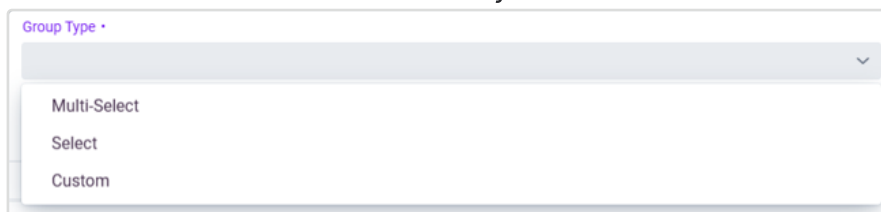
## Activity Option Groups

Activity Option Groups are used as part of setting up an Activity. If an LPDC requires certain types of activities to be completed in order to count as credit towards a certificate renewal they can be configured using this page. If no activity option groups exist, or if no active option groups exist, the Option Groups tab will not appear when users create Activities.

**Role:** Users with District Manager or Admin roles.

### Create Activity Option Groups

1. From the Activities menu, select “Activity Option Groups”
2. Click [+ Create](#)
3. Enter Activity Option Group information
  - a. **Group Name:** Enter the group name
  - b. **Option Group Type:** Determines if one or more options can be selected for this group
    - i. Multi-select - Multiple options can be selected with checkboxes
    - ii. Select - Only one option can be selected
    - iii. Custom - Question and Answer. Each Option Label will provide a text box for an answer to be entered. *Max 255 characters for the answer text.*



- c. **Active:** This box will be checked when creating an Options Group. If this box is checked, the Option Group will be active and available to use on Activities. If unchecked, it will be inactive and will not appear when creating Activities.
  - i. This checkbox cannot be modified on individual records. See [Activate/Inactivate Activity Options Group](#).

d. **Add Option:** Click + Add Option to add a new option. Enter the Option Label and enter the Option Description. Active box will be checked. *Option Description Max Characters 2000.*

Activity Options						Option Label	Option Description	Active
						Conference	In person gathering with multiple sessions	<input checked="" type="checkbox"/>
						Online Seminar	Session attended virtually	<input checked="" type="checkbox"/>

+ Add Option

- i. View Option - Shows a read only view of the original window where Option Label and Option Description were entered.
- ii. Edit Option - When creating the Options Group, any Activity Options that have been added can be edited during the creation process. Option Labels and Descriptions *cannot* be edited once an Activity Options Group is saved. Instead, options can be made inactive and new options can be added if needed.
- iii. Move Option - Moves options up or down in the list. This order will be used as the order of Activity Options when users create an activity.
- iv. Make Option Active/Inactive - Used to make options in this group active or inactive. Inactive rows will not show for users when creating an activity. The Active checkbox will show a green checkmark for active rows or a red X for inactive rows.
- v. Delete Option - Delete the option from the Options group. This is only available on inactive options for Activity Options Groups that have not been used on an activity.




4. Click on ✓ Create to create Activity Option Group or ⊗ Cancel to cancel out of the window without saving changes.


Once the Activity Option Group has been added to this grid, it will appear as an option when the employee creates a new activity.

### Activity Option Groups Grid Options

The Activity Option Group grid allows the user to search, view, and manage Option Groups that have been created.

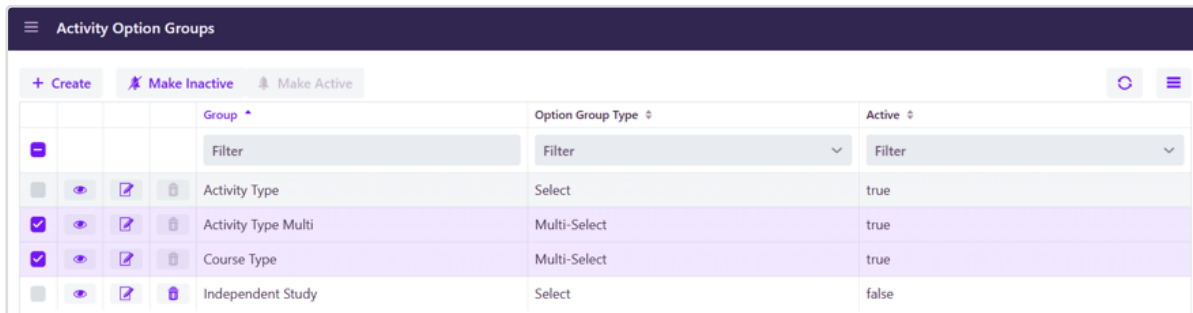
Activity Option Groups						
<span>+ Create</span>		<span>Make Inactive</span>		<span>Make Active</span>		<span>Refresh</span> <span>Menu</span>
Group	Option Group Type	Active				
<input type="checkbox"/>	Filter	Filter	Filter			
<input type="checkbox"/>	Activity Type	Select	<input checked="" type="checkbox"/>			
<input type="checkbox"/>	Activity Type Multi	Multi-Select	<input checked="" type="checkbox"/>			
<input type="checkbox"/>	Course Type	Multi-Select	<input checked="" type="checkbox"/>			
<input type="checkbox"/>	Independent Study	Select	<input type="checkbox"/>			

-  View Activity Option Group
-  Edit Activity Option Group
  - The Option Group Name or Type cannot be edited. Existing options included in the Activity Options Group can be made inactive and new options can be added.
-  Delete Activity Option Group

 An activity option group can only be deleted if it is *inactive* and not currently used on any activities. For activity option groups that have been used on previous activities, but should not be available to choose on new activities, make the activity option group inactive instead.

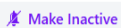

### Activate/Inactivate Activity Option Groups

The Activity Option Groups 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. Activity Group Options can *only* be made inactive from the grid. The Active checkbox is not modifiable on individual records.



	Group	Option Group Type	Active
<input type="checkbox"/>	Filter	Filter	Filter
<input type="checkbox"/>	Activity Type	Select	true
<input checked="" type="checkbox"/>	Activity Type Multi	Multi-Select	true
<input checked="" type="checkbox"/>	Course Type	Multi-Select	true
<input type="checkbox"/>	Independent Study	Select	false

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.

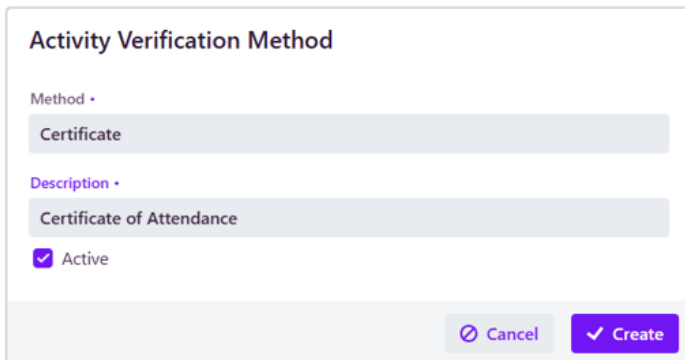
## Activity Verification Methods



Activity Verification Methods can be set to determine acceptable documents to verify completion of activities.

**Role:** Users with District Manager or Admin roles.

## Create Activity Verification Method

1. From the Activities menu, select “Activity Verification Method”
2. Click 
3. Enter Verification Method information
  - a. **Method:** Enter the verification method name (ex. Certificate, Transcript, Agenda, Outline, etc.)
  - b. **Description:** Enter the full description of the verification method
  - c. **Active:** If this box is checked, the Verification Method will be active and available to use on Activities. If unchecked, it will be inactive and unavailable to be used.
















4. Click on  to create Activity Verification Method or  to cancel out of the window without saving changes.


## Activity Verification Method Grid Options

The Activity Verification Method grid allows the user to search, view, and manage Verification Methods that have been created.



Activity Verification Methods		
+ Create		
Make Inactive		
Make Active		
Method	Active	Description
Filter	Filter	Filter
<input type="checkbox"/>   Activity Log	true	Activity Log
<input type="checkbox"/>   Agenda	true	Agenda
<input type="checkbox"/>   Brochure	true	Brochure
<input type="checkbox"/>   Certificate	true	Certificate of Attendance
<input type="checkbox"/>   Outline	true	Meeting Outline
<input type="checkbox"/>   Transcript	true	Course Transcript

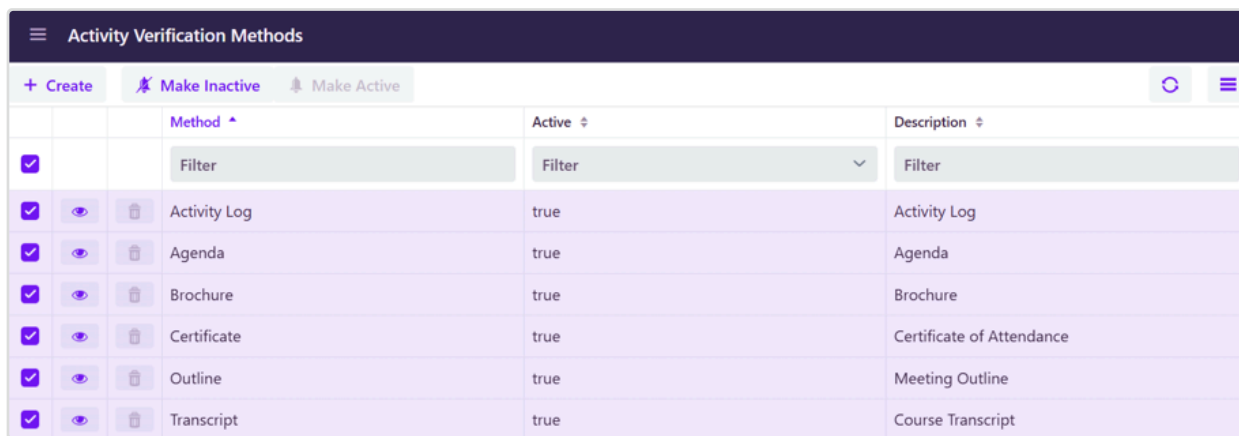
-  View Activity Verification Method
-  Delete Activity Verification Method

 An activity verification method can only be deleted if it is inactive and not currently used on any activities. For activity verification methods that have been used on previous

activities, but should not be available to choose on new activities, make the activity verification method inactive instead.

### Activate/Inactivate Activity Verification Methods

The Activity Verification methods 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.



Activity Verification Methods					
+ Create		Make Inactive		Make Active	
		Method ^	Active ↕	Description ↕	
<input checked="" type="checkbox"/>		Filter	Filter	Filter	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Activity Log	true	Activity Log	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Agenda	true	Agenda	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Brochure	true	Brochure	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Certificate	true	Certificate of Attendance	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Outline	true	Meeting Outline	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Transcript	true	Course Transcript	

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

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## More Information

### Viewing the Approval Trail

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

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Supervisor Approved	The activity has been approved by the Supervisor. The Committee can still approve this activity.
Pre-Approved	The activity has been pre-approved. This will only be available when the <a href="#">Preapproval Configuration</a> is enabled. The activity can still be submitted for final approval.
Approved	The activity has been approved and Total CEUs on the plan have been updated to include the activity.
Returned for Modification	The activity was returned for modification. The activity can be edited and resubmitted for approval.
Archived	The activity is associated with a plan that has been archived.
Denied	The activity was denied and cannot be modified or resubmitted for approval.