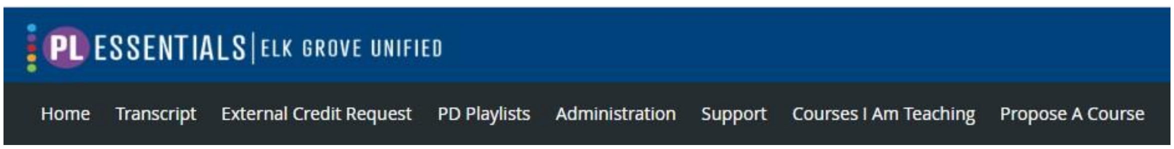
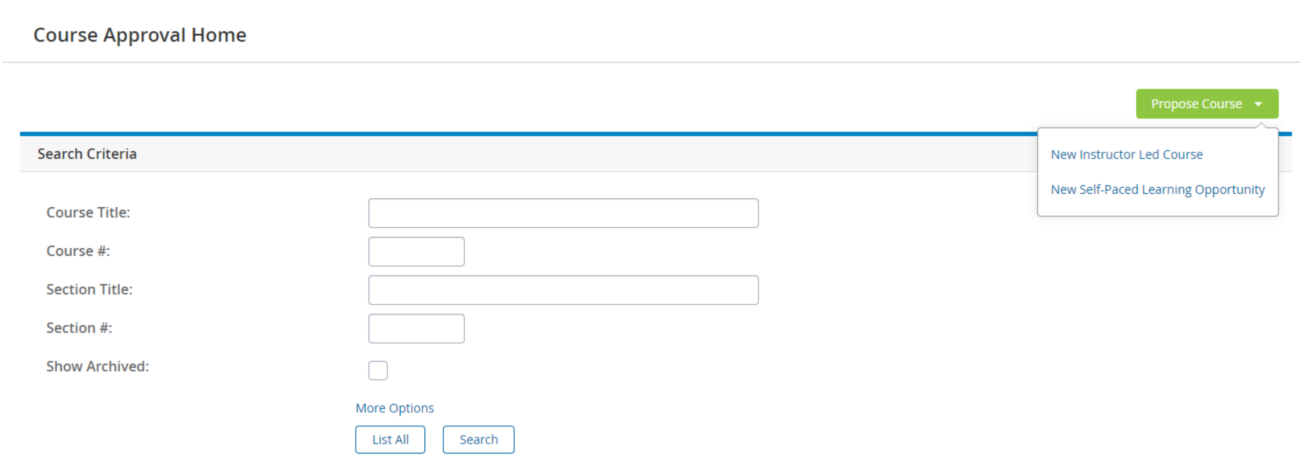
Propose a Course and Section for Approval

What was previously done on hardcopy Workshop Proposal forms and Book Study Proposal forms is now done in the PL Essentials system by submitting an online Course Proposal form. To create a new course and submit it for approval as a Course Requester, follow these steps:

1. Click **Propose a Course** in the tabs along the top of the home screen. (Please note: available tabs may vary by user.)



2. On the right side of the next screen, click **Propose Course**, then select **New Instructor-Led Course.**



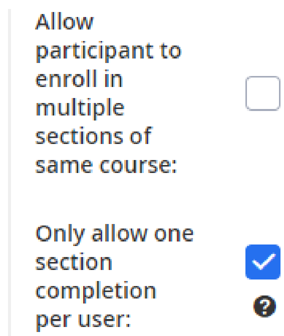
Please note: You can also use the search box to find your existing approved course and "copy" the information on that course to propose the course again for a different target audience, **OR** to find an existing approved course and add another section of that course for the same audience.

<u>Complete Course Details</u>

1. Complete the details, noting that any required fields will be identified by an asterisk (*) in the system.

    - **Course Title***:* Enter a brief, clear title for your course. If this is a repeat of a previous course that you are now offering to a new audience, please be sure to use the same title. If you are offering a book study, please start your title with the words "book study", followed by the title of the book. You can then add any additional language.
    - **Course Description –** Enter a description of the content of the course. This information will be viewed by all registrants.
    - **Course or Book Study –** Select the type of course that you are creating.
        - *Please note*: for guidance on offering a Book Study, please see the [Book Study Guidelines]() document before proposing. Book Study formats/policies have changed starting with the 21-22 school year, so please read the new guidelines carefully.
    - **Title of Book –** This section is for Book Studies only. Please enter the exact title of the book you are using.
    - **Salary Class Request –** Choose the Classification(s) of your intended audience. Hold down Ctrl to select multiple classifications. For District-Wide workshops, please always select "Community Ed" as well.
    - **Office –** Please select your <u>main/official district location</u>. Your office routes your proposal to your site administrator for first level approval. For questions, contact CPL.
    - **Credit Types –**The types of compensation that your training will offer to participants:
        - *<u>Salary Credit Hours</u>:* This option will always need to be selected. Please enter the total amount of hours in the training, subtracting time for any breaks or lunch time provided (example: 8:00am-3:30pm, with a 1-hour lunch and two 15-minute breaks = 6.0 hours of salary credit).
        - *<u>Certificated Timesheet</u>:* Choose this option when the training is open to Certificated staff **AND** you have the funding source/funding already approved for timesheet pay. Please note that CPL does not automatically provide the funding for any workshop requesting the timesheet option. Enter "0.0".
        - *<u>CSEA Timesheet</u>:* This option is mandatory when your training will be open to CSEA staff members. Enter "0.0"
        - *<u>Classified Timesheet – Arbinger Only</u>:* Select this option <u>only</u> when you are offering an official *Outward Mindset in Education* training. Enter "0.0"
        - *<u>A note about Induction Credit</u>:* Starting with the 22-23 school year, Induction Credit is no longer an option for EGUSD trainings.

- **CSTPs** - For workshops that are open to Certificated staff, select all CSTPs that apply.
- **Mastery of CSTPs/Enhance Assignment –** If you selected CSTPs in the previous section, explain how they apply, **and/or** if the course is open to Classified staff, use this section to explain how the content will apply to Classified participants' district assignment/position.
- **Notes** – Any additional information about the course that you would like to include. This information will be viewed by registrants.
- **Course Survey**- Select the Survey type for your course. For most courses, select "Professional Learning Evaluation." Only select "Outward Mindset Survey" when offering an official *Outward Mindset in Education* training.
- **Allow participants to enroll in multiple sections of the same course**: please leave this box ***unchecked***.
- **Only allow one section completion per user**: please leave this box ***checked***, unless your training is a training that staff is required to complete on a regular basis as part of their official contract (such as CPR Certification or Non-Violent Crisis Intervention).



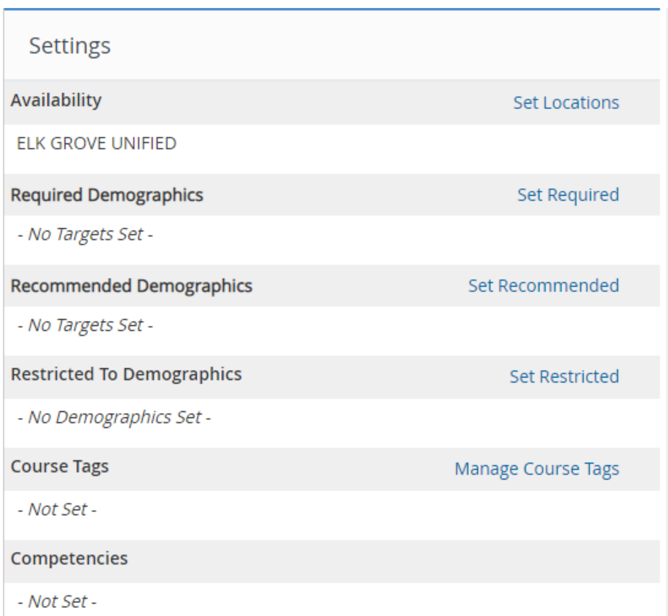
2. To save your work while completing the form, click **Save Draft** at the bottom of the page. A title must be entered to save a draft, as well as any other fields designated as required. *You have **60 minutes** from the time you access the course creation page until you save before the page is reset, and any information entered is lost.* For longer forms, we recommend entering content in the required fields first, save the form, then continue filling out the optional fields.

3. Once the form is complete, click **Create Instructor Led Course**. On the next screen, you will begin to enter the course settings/restrictions

Select Course Settings

Once your course has been created, you will need to select the settings. This will determine which users will be able to view your course in the course catalog and register for the course.

Navigate to the **Settings Menu** on the right side of your course screen to see the different settings available. You will only be filling out the availability, "restricted to" demographics, and course tag settings.

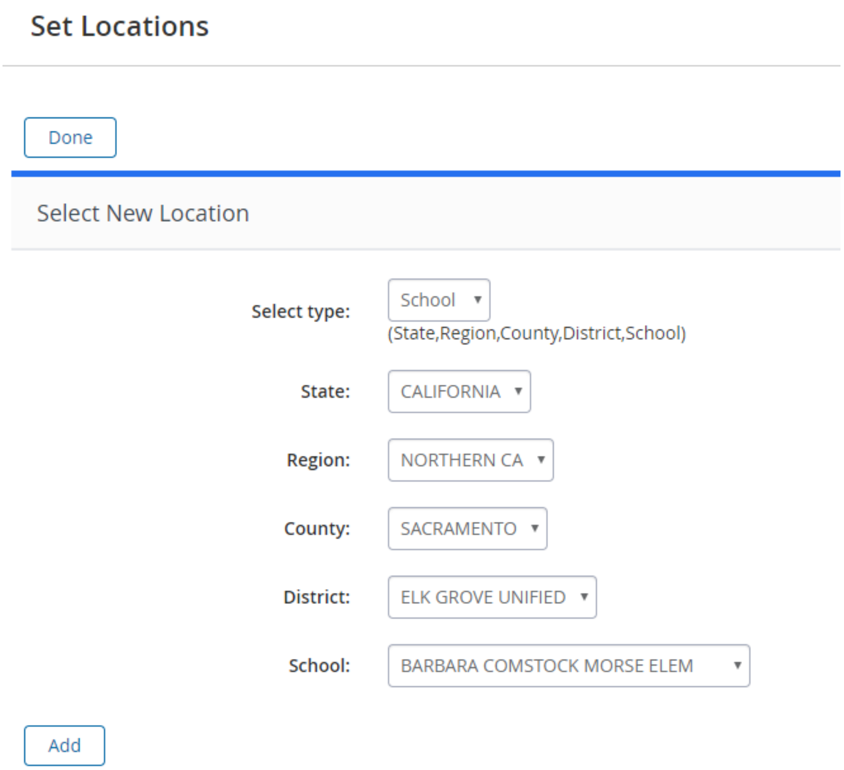


Availability/Set Locations

This setting allows you to restrict who can access the course in the catalog and register for your course based on their site location.

This section is defaulted to ELK GROVE UNIFIED, meaning that the course is open to all sites in the district.

If you wish to further restrict by specific site locations, this is where you can do that by selecting the type "school" and filling in the drop-down menus. You can continue to select sites and choose "add" until you have the restrictions that you want. Please note: "school" is not just limited to actual school sites, you will be able to choose from all district locations, such as departments in the district office. Be sure to remove the district location of ELK GROVE UNIFIED if you are restricting based on site, otherwise your course will still be open to any site in the district.



"Required" & "Recommended" Demographics

Please leave these two sections blank.

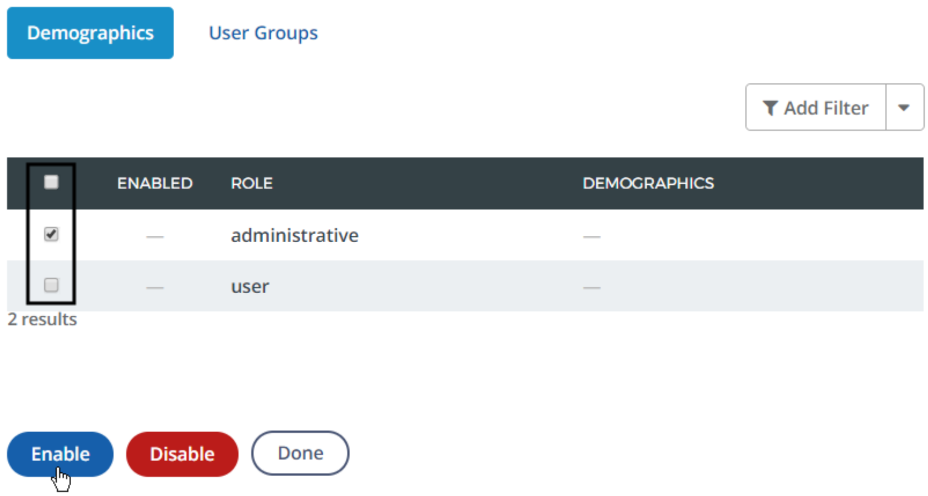
"Restricted to" Demographics

This setting allows you to restrict who can access the course in the catalog and register for your course based on their Classification/Position.

To set Restricted criteria follow the steps below:

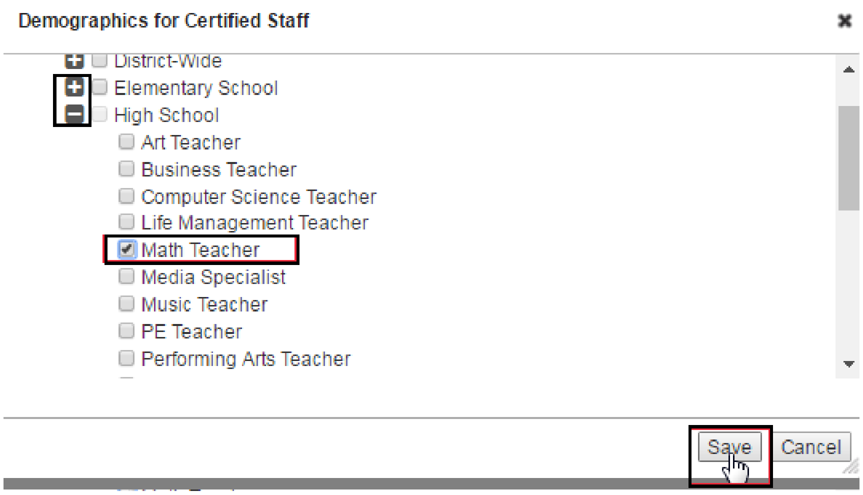
1. Click Set Restricted.

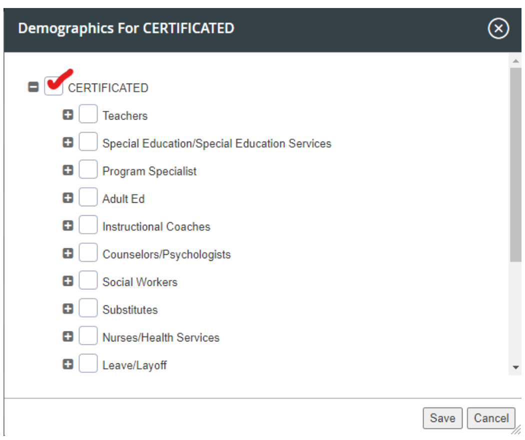
2. Select the checkbox next to the desired demographic role, then click **Enable**.



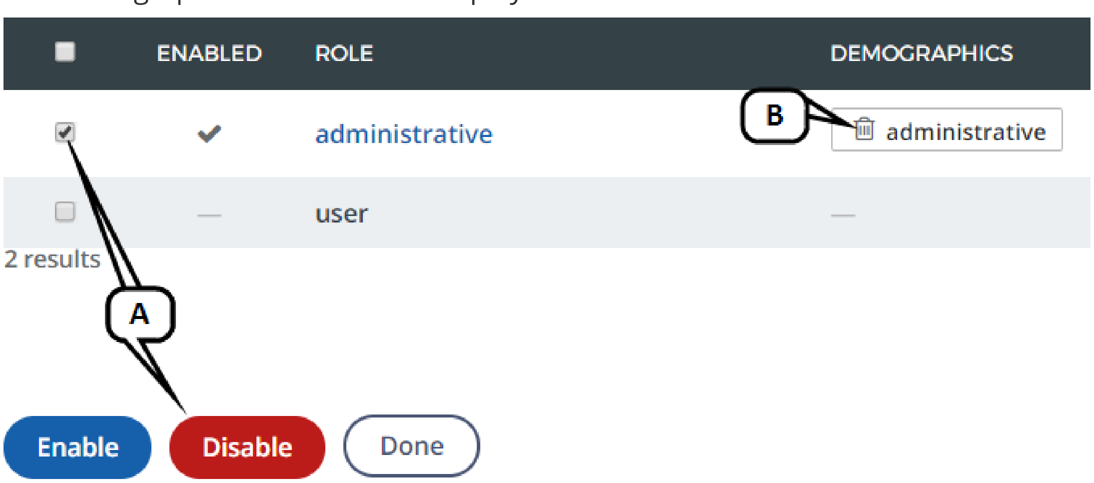
3. This will change the demographic role name into a link; click the link to access additional, more specific, demographic choices.

4. When necessary, use + / - to expand/collapse options (to open/close the demographic "tree"). Select all applicable checkboxes. Please note that you **must select at least the top line** of the demographic (see red check mark in image below) to set your restriction. IF you choose to restrict more specifically using the demographic tree you can (for example, only High School Math Teachers). Please remember to include Certificated Substitutes for appropriate courses.





5. Click **Save** when finished.
6. Your demographic choices will be displayed.



A. To disable a demographic role, select the checkbox next to the desired demographic role, then click **Disable**.

B. To remove specific demographics, click the trash can icon to the left of the name.
7. When finished setting demographics, click **Done**.

Course Tags

Select the Course Tags that apply to your course. Users will be able to search for courses in the course catalog using Course Tags. Tags are also used by district departments to run reports on the type of workshops that the district offers throughout the school year. There is no limit to number of tags you can apply, but most workshops do not require more than three or four tags. Please consider your tags carefully.

- Most courses open to Certificated teaching staff should have the tag "**Effective Teaching**", along with the tag(s) for the appropriate subject area(s).
- Most courses that have to do with student instruction and meeting the needs of students, as well as courses having to do with English Learners or Special Education should have the tag "**Equity & Diversity**".
- If your course content includes using or learning to use an online/computer-based program or platform, please remember to select "**Digital Education/Technology**".

If you need guidance on selecting tags, please contact Curriculum and Professional Learning.

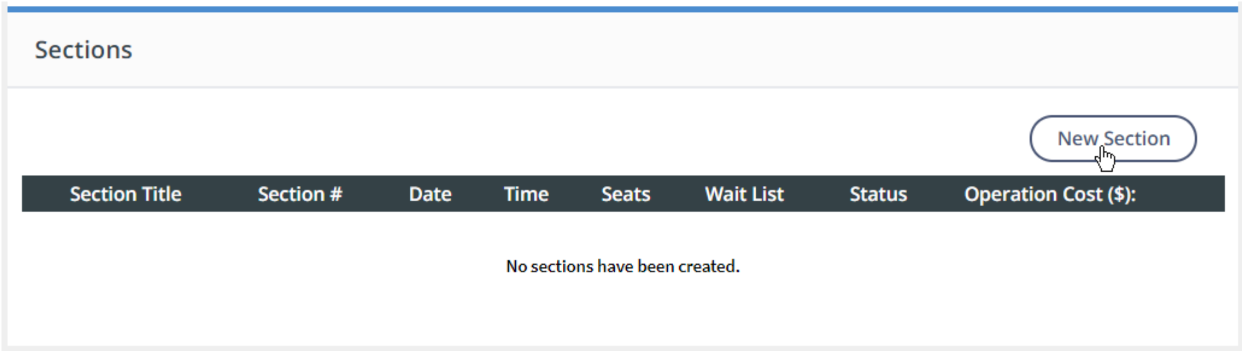
Competencies

EGUSD is not currently utilizing this section. Please leave this section blank.

Create Sections of Your Course

Next, you will need to create a section (or multiple sections) of your course. Every instructor-led course is required to have at least one section. Sections are the offering(s) of the course that the participants will choose from and register for.

1. Scroll to the bottom of the screen and click on **New Section**.



> **Note:** A section cannot be added to a course saved as a draft.

2. Complete the form, noting that required fields will be identified with an asterisk (*):

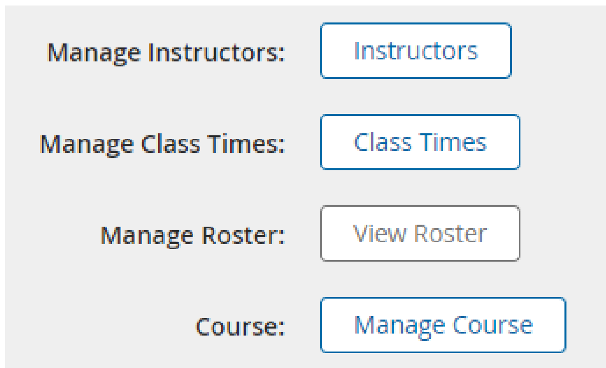
- **Section Title:** The title should be identical to the title you used when creating your course.
- **Address Book:** For your reference, a listing of commonly used locations and their addresses, including school sites, district office training rooms, and other frequently used locations. Please note that this is only a reference so that you do not need to look up a site address. *You still need to fill in the next sections of the form asking for location and street address information or your registrants will not see a location for your training.*
    - If your course is occurring virtually, please leave this section blank.
- **Location/Room Number/Street Address sections:** Enter the name of the workshop location, and the address information. This is the information that will be displayed to the registrants, and the information that will create any maps linked to your section.
    - If your workshop is occurring virtually, please type in the program being used (such as Zoom or Google Meet) as the "location/room number" and leave all other address fields blank. Do not put your Zoom link and password directly into the location section.
- **Contact Person:** The person who should be contacted with questions (questions from both CPL staff who are processing your proposal and from any staff member who views your section on the PL Essentials system) about the section. This can be a presenter, a coordinator, or another designated contact person of your choice.
- **Instructors and Compensations:** Enter the names of the ***official presenters***, along with their compensation choices for their time. See the PLAC and JETA Handbooks for more specific information regarding presenter compensation. You can enter information for up to 4 presenters in this section. Any additional presenters and their compensation choices should be listed in the "notes" section. Do **not** enter the names/compensation choices for staff that will not be actually presenting (such as a coordinator that you only want to have roster access).
- **Outside Facilitator:** If the section presenter is not an EGUSD employee, please list their name here.

- **Maximum Number of Participants:** Define the maximum number of participants for your section. Registration for this section becomes unavailable once this number is reached, and additional interested staff will be placed on a waitlist. Please note that the maximum for a Book Study is 20 seats.
- **Minimum Number of Participants:** This area defies the minimum number of registrants required to conduct the section. EGUSD generally requires a minimum of two registrants to hold a workshop section, so this area is auto-filled to "2". If you would like a larger minimum seat count, please contact CPL for approval first.
- **Allow Waitlist:** This section should automatically be selected for you. When a registered participant withdraws from the section, a waitlisted participant will automatically be moved into that seat.
- **Maximum Waitlist Size**: This section is auto-filled to "10". If you would like a larger waitlist, feel free to edit.
- **Section Start Date**: The first date that your section will occur.
- **Section End Date**: The last date that your section will occur. This may be the same as the Start Date.
- **End of Registration Date**: Please enter a date two days before your Section Start Date, unless another date has been pre-approved by CPL.
- **Waitlist Cutoff Date**: Same as the End of Registration Date.
- **Classtime Default (Start Time):** Enter the time that your workshop will start.
- **Classtime Default (End Time)**: Enter the time that your workshop will end.
    - **Note:** If you have multiple days that your workshop will meet, you will be able to edit the start and end times for individual dates in the **additional section settings Actions** section later on.
- **Release Section Now:** This is the default option. Please leave this as selected. Your section will be released into the PL Essentials course catalog once it has been through the official approval process.
- **Or Release Section At**: Only use this option for large trainings such as Saturday Seminars, and only when use is first discussed with CPL staff.
- **Notes**: Any other information about your section that you would like to have made available to registrants or CPL staff. **For Book Studies**: please enter your participant writing reflection due date here. The due date should be after your final training date, but still fit within the 8-week timeline allowed for Book Studies.
- **File Attachments**: Required: attach the agenda for your training. This only needs to be a basic outline for the day, including the times for breaks/lunch. Optional: attach any other files that you would like to make available to registrants, such as a syllabus or a handout. Please note that anything you attach here will also be available for viewing by all staff registering for your section. **For Book Studies**, also attach a description of the book and the agenda/discussion questions for your first training date.

3. Click **Create** to create the new section. You will see a summary of your section.

4. ***Please note:*** *clicking "Create" does not mean you are finished!* Scroll to the very bottom of the page to access the buttons for the additional section settings via the **Actions menu**.

The Actions Menu

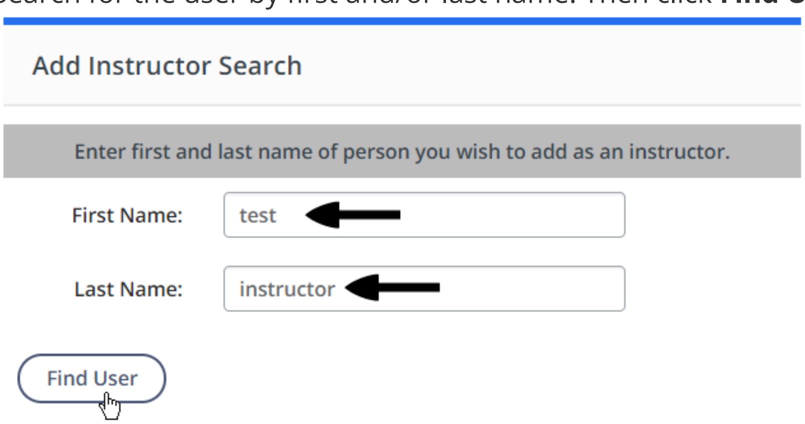


Manage Instructors

Click **Instructors** in the Actions Menu to add in all official section Presenters as well as any section Coordinators (people who are not actually presenting at the training, but may want access to the Presenter roster functions, which include viewing the roster, manually registering/withdrawing staff, and sending/receiving communications with participants regarding the section).

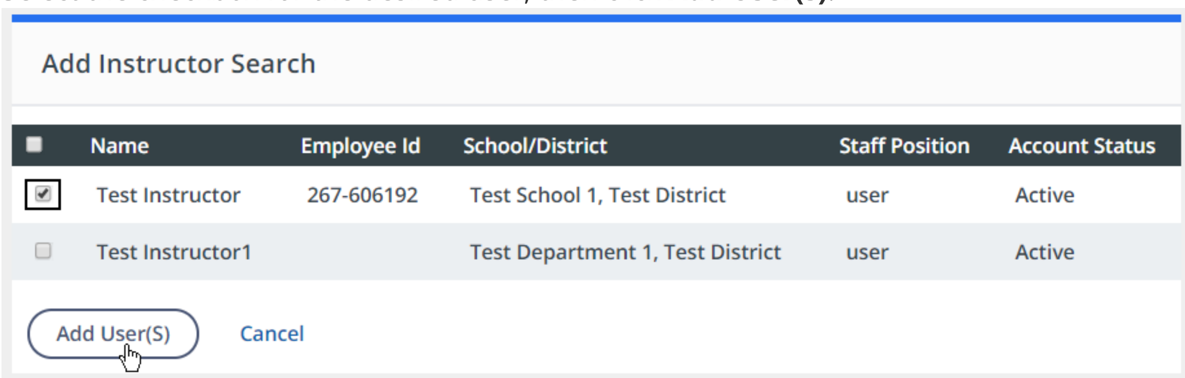
Assign Instructors by following these steps.

1. Click **Instructors** on the Actions Menu.
2. Search for the user by first and/or last name. Then click **Find User**.

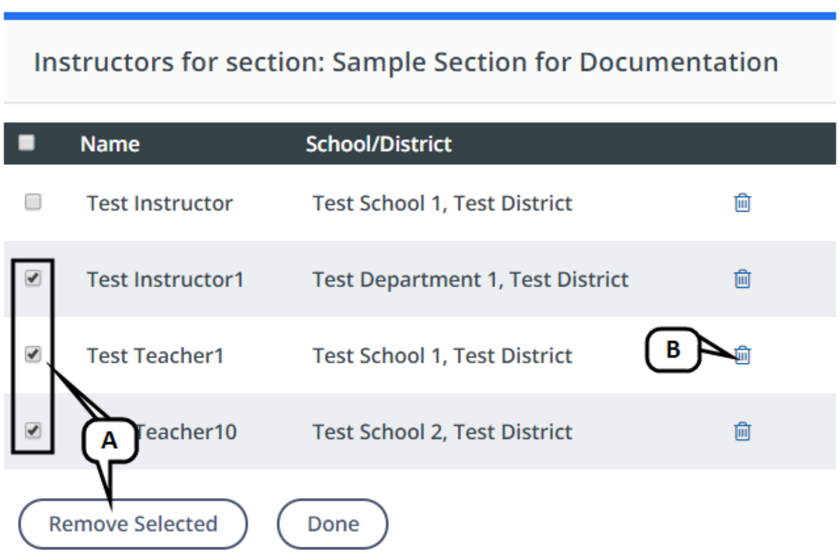


*Tip: If you cannot find a staff member and are sure that you are spelling their name correctly, check to see if you have accidentally included a space after the last letter of the first name. This is a common error.

3. Select the checkbox for the desired user, then click **Add User(s)**.



4. Selected users will be listed.

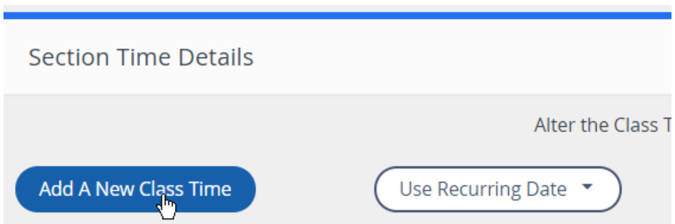


5. To remove a specific user, click the applicable trash can icon. To remove multiple users at once, select the checkboxes next to their names, then click **Remove Selected**.
6. When finished managing Instructors, click **Done**.

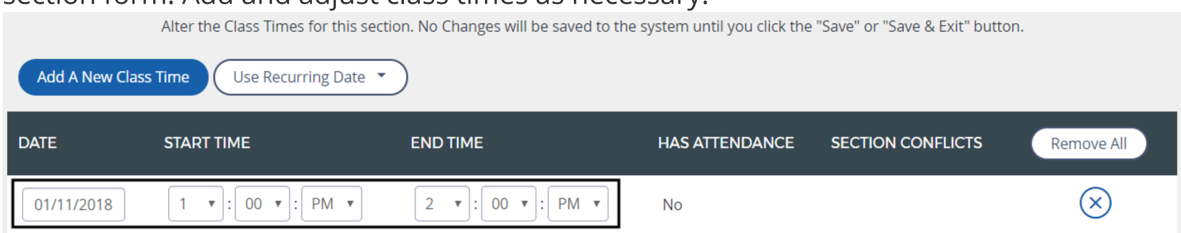
Manage Class Times

Set the specific meeting days and times for your section here.

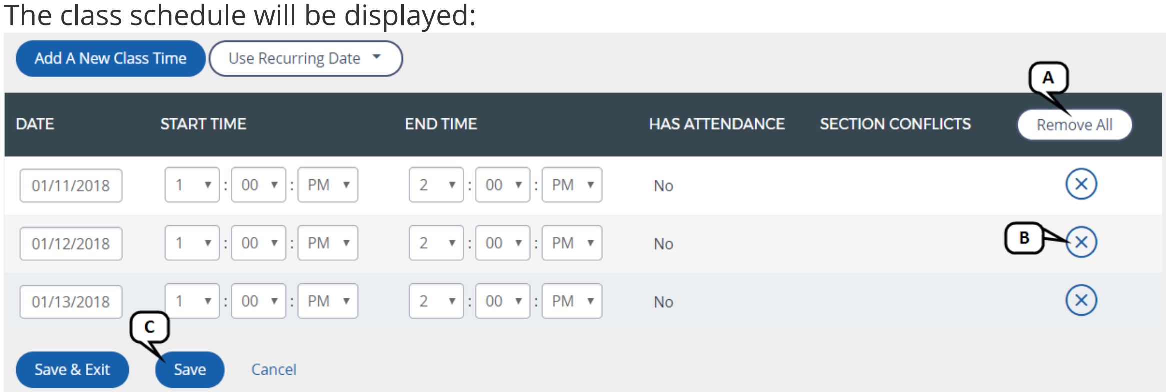
1. Click **Class Times** on the Actions Menu.
2. Click **Add A New Class Time**.



3. The date and times will default to the Start Date, Start Time, and End Time you entered on the section form. Add and adjust class times as necessary.



The class schedule will be displayed:



A. To remove all class times at once, click Remove All.
B. To remove a specific class time, click the delete icon.
C. To save your class times and keep working, click Save.

4. When finished setting all class times, click **Save & Exit**.

Manage Roster

This function will be available once the course has been approved by CPL staff and is active in the PL Essentials course catalog. The button will be disabled until the course/section has been approved. Staff members that were listed under "Manage Instructors" in the actions menu will be able to view the registrant list, withdraw/register users manually as needed, email one or all registrants, see attendee survey results, and more.

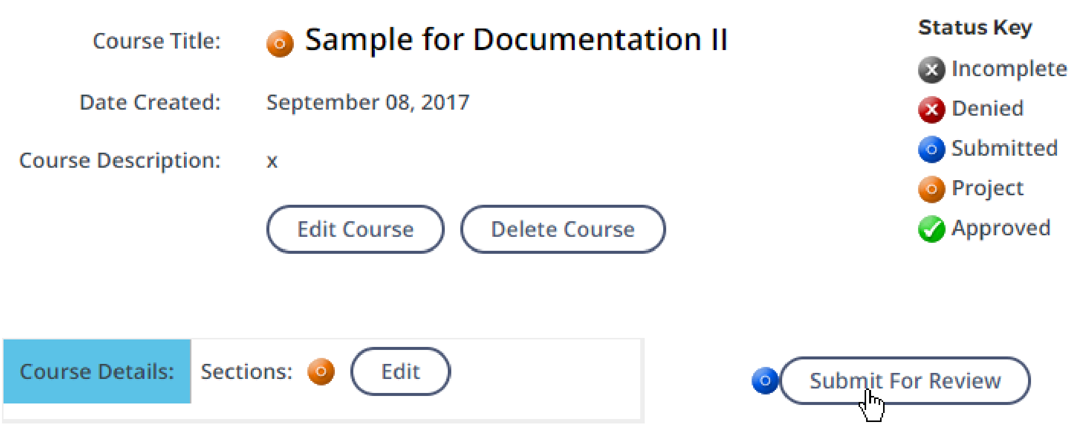
Complete the Section

Once you've completed all section details, location and demographic settings, and Action Menu settings for your section(s), click **Done**.

Repeat the steps for adding additional sections as needed.

Submit Course and Section for Review

1. When all information is entered for your course and section(s), click **Submit for Review**.



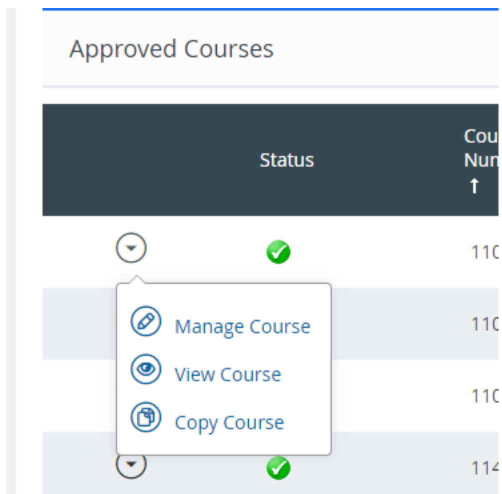
2. Click **OK** when the pop-up appears.
3. Click **OK** again to close the confirmation.

The course will no longer appear in Current Projects; it will now appear in Submitted Courses. The course/section cannot be edited while in review.

Adding Additional Sections to an Existing Approved Course

If you have an existing (previously approved) course and you would like to offer it again to the same audience, then you would simply propose a new section of that course.

- On the PL Essentials homepage, click “Propose a Course”.
- Next, on the left-hand side of the screen, click “Approved Courses” to see your list of previously approved courses.
- Using the actions drop down menu to the left of the course name that you want to add a section to, select “Manage Course”



- Scroll down to the very bottom of the Course Submission screen, and in the lower right-hand side select “New Section”

- Follow the directions for submitting a section earlier in this user guide, and submit for review.

The Approval Process and Approval Paperwork

The Approval Process

Once you have submitted a course/section for review, it goes through a two-tier approval process in the PL Essentials system:

- **First**, your proposal needs to be reviewed by your site administrator (First Level Approval). Your site administrator will receive auto-notification from the PL Essentials system that there is a course/section needing review. They will review the content and then either approve or deny using the PL Essentials System. ***It is the responsibility of the course/section proposer to ensure that the First Level Approver reviews your proposal in a timely manner.***

- After the First Level Approver has officially approved your proposal in the system it moves on to the approval queue of Curriculum and Professional Learning staff (Second Level Approval). **This is when your proposal is considered received by CPL and the 15 working-day approval processing timeline begins**, it does *not* begin when you have submitted your course request to the First Level Approver. CPL staff will then either approve or deny your course and/or section, within 15 working-days from the date received from the first-level approver. Proposals are processed in the order in which they are received. Rush requests for processing faster than the 15 working-day timeframe will not always be possible and are considered on a case-by-case basis.

- If your course is **approved** by CPL, you will receive an approval memo via email from a CPL staff member

- If your course is **denied** either by your Administrator as the first level approver or by CPL as the second level approver, you will receive an auto-email notification from the PL Essentials system. The reasons for denial/corrections needed for resubmittal will be listed on the course and/or section(s) that have been denied. To view your denied course, click the link in the email, or on the PL Essentials homepage click "**Propose a Course**", and then select "**Denied Courses**" on the left-hand side. Find the course, and click "edit" to make any needed corrections, and then resubmit for approval.

You may self-check the status of your course/section proposals in the PL Essentials system at any time by going to "**Propose a Course**" on the homepage, then selecting "**Submitted Courses**"

- You will see a blue “1” next to your pending course when it is in your Administrator’s approval queue.
- You will see a blue “2” next to your pending course when it has been approved by your administrator, and it is now in CPL’s approval queue.

The Approval Paperwork

Once your workshop has been officially approved by CPL, all approval paperwork will be emailed directly to the proposer of the course.

Your paperwork will include:

- **The approval memo**. Please read the information in this memo carefully and thoroughly, as it outlines presenter/coordinator responsibilities and important timelines. Information in the memo will be updated occasionally, so please be sure to read the full approval memo each time you receive it.
- **The official EGUSD sign-in sheet**. This is the sign-in sheet that should be used at the workshop. Please do not print the section roster off of the PL Essentials system to use. Please do not create sign-in sheets of your own to use.
    - **For online workshops**, a link to the current CPL Master Sign In Sheet Google Form will be included in your approval memo.
    - **For in-person workshops**, the official sign-in sheet form will be attached to your approval memo as a PDF. Please print to have at the workshop.

Your paperwork will no longer include:

- **Certificates of Completion**. These will now be available to attendees digitally in the PL Essentials system once the sign-in sheet has been processed by CPL staff. There is nothing for presenters to print out or sign.
    - Exceptions to this can be made for large trainings with high seat counts such as Saturday Seminars and large Outward Mindset trainings where hardcopy certificates of completion may be required to verify complete attendance by participants. Please contact CPL directly if this is something that you are interested in requesting.
- **Workshop Evaluations**. These are now called “surveys” in the PL Essentials system and will be available in the system to attendees once the sign-in sheet has been processed by CPL staff. Surveys are only available for 2 weeks after your course end date, after that time the link expires and attendees no longer have survey access to your course.
    - This is why it is important to turn your sign-in sheets in to CPL as soon as possible, so the information about your workshop is still fresh in the mind of

your attendees when CPL is finished processing the sheets, and so that the survey has not yet expired.

- Once staff have completed the surveys for your workshop, you will be able to see the responses using the PL Essentials system, via the section roster.
- If you wish to distribute your own workshop evaluation/survey at the end of your workshop as well, you may do so. CPL would not need to be sent copies of those surveys, they would be for your records.

Where to Get Support

If you have any questions or issues that this user guide does not cover, please see below.

- If you are having technical issues **logging in to PL Essentials via the EGUSD ClassLink Portal**, please contact the Technology Services Department help desk.

- If you have any questions on the **basic navigation and usage** of the PL Essentials system, please contact the Curriculum and Professional Learning Office.

- For any questions, or if you need **additional guidance proposing courses and sections**, please contact the Curriculum and Professional Learning Office.

- Additional information on **EGUSD Professional Learning policies and procedures** can be found in the PLAC handbook (for Certificated staff), the JETA handbook (for Classified staff), and the CPL FAQ, all found on the Professional Learning website.

- The PL Essentials system also has a built-in product information help section. To access this, click the question mark button located at the top right-hand side of the PL Essentials homepage.