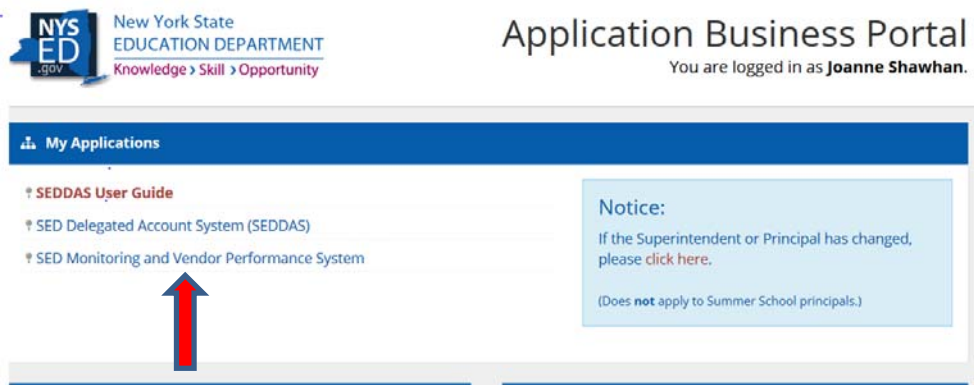


How to Review 2018-2021 Instructional Technology Plans

A Mini-Guide for RIC Reviewers

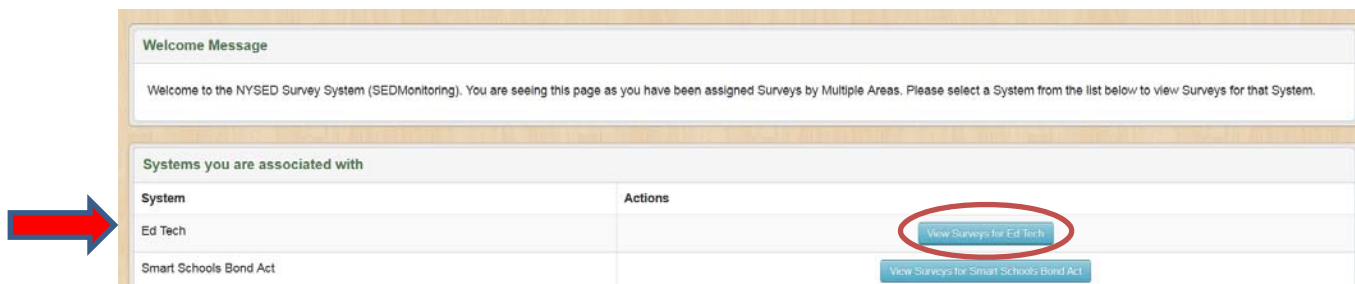
Log on to NYSED Business Portal. Click **SED Monitoring and Vendor Performance System**



Note: The screen shots in this guide are from test plans created as part of the plan development process. They are NOT from actual plans

Completing and Submitting the Technology Plan: District instructions

1. If a user is entitled to several applications, click on Ed Tech, [View Surveys for Ed Tech](#).



2. It is very important to **Save** before moving to the next section or logging off. To remain on the page, click the blue **Save** button on the top or bottom of the page. To go to the next section, click the green **Save & Continue** button, which is also on the top or bottom of the page. All required questions must be answered before moving to the next section.



3. There are several ways for a district to get help while completing the plan.
 - a. Contact their RIC Reviewer or Model Schools facilitator.
 - b. Check the Instructional Technology Plan [Resources page](#)
 - c. Send an email to edtech@nysed.gov
4. If the district wishes to view their 2016 or 2017 plan prior to completing the new plan, it can do so in its Outbox.



Survey Recipient	Survey	Cycle	Status	Status Date	
LANCASTER CSD	Ed Tech Workflow	Survey Annually 2016	Approved	3/30/2016	View Print Print Blank
LANCASTER CSD	Ed Tech Workflow	ANNUALLY, 2015	Approved	3/14/2016	View Print Print Blank

5. Submitting the technology plan: The district is advised to consult with their [Regional Information Center](#) before submitting the tech plan. Once the district has filled out the plan and believes it to be complete and accurate, the district submits it to the Regional Information Center (RIC) for review. Plan submission is a two-step process.
 - a. Step #1: The District clicks on the **Save & Submit Survey** button. This button appears at the bottom of every page if all required questions in the tech plan are answered and no question exceeds the word limit.



- b. Step #2: The Superintendent of the District certifies the plan and submits it to the RIC Reviewer. Only the Superintendent can certify the plan and submit it to the RIC Reviewer. Districts should not submit the survey prior to consulting with their RIC. RIC Reviewers will receive an automatic email notification when the survey has been submitted by the district. NOTE: RIC Directors will *not* receive this email notification.

Certification & Submission Print Survey | Email

I hereby certify that I am the LEA's chief administrative officer and that the information contained in this plan is, to the best of my knowledge, complete and accurate.

- c. If a RIC Director wants to be included in the auto-email notification that a plan has been submitted, s/he needs to create a second account with a new user name and the position/title of "Other". If warned that a user ID already exists, that warning can be ignored because a second account is being created deliberately. For additional details, see [Creating User IDs in SEDDAS: RIC Directors](#) and [A Quick Guide: Entitling Users to SED Monitoring System Ed Tech](#).
- d. When a district submits their Plan, it goes directly to the RIC Reviewer. It is *not* submitted to NYSED. Plans are submitted to NYSED by the RIC reviewer after s/he has reviewed the plan and determines that it is approvable.

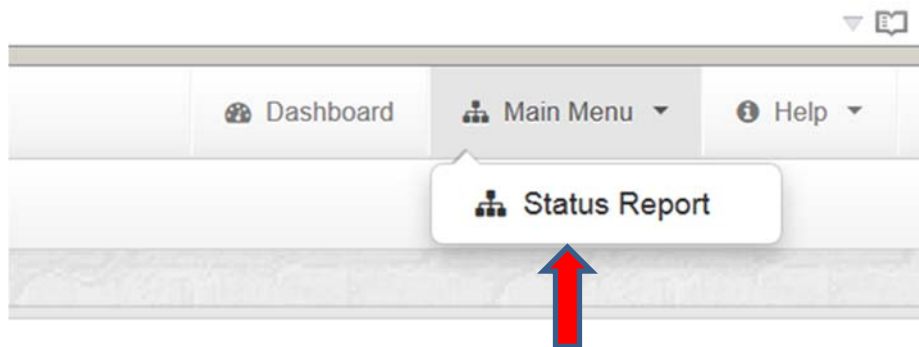
REVIEW PROCESS

1. Reviewer logs into the Tech Plan application and checks the Inbox for plans that have been submitted.

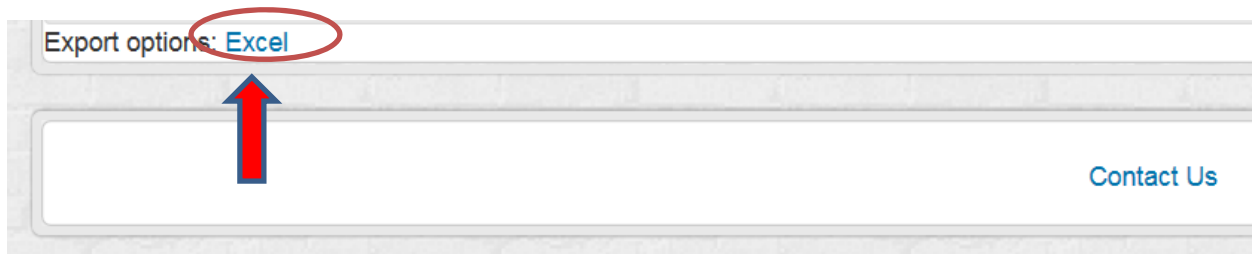
Inbox (3) ↓		Outbox		Search: <input type="text"/>		
Survey Recipient	Survey	Cycle	Status	Due Date	Actions	
WATERVILLE CSD	Instructional Technology Plan (TEST)	2018	Submitted	10/26/2018	<input type="button" value="View"/>	<input type="button" value="Print"/> <input type="button" value="Print Blank"/>

2. The Reviewer clicks on View to open the survey to review. More than one certified RIC Reviewer can review a survey at the same time. Keep in mind, however, that the first Reviewer that clicks un-submit or Send to NYSED would determine where it goes.

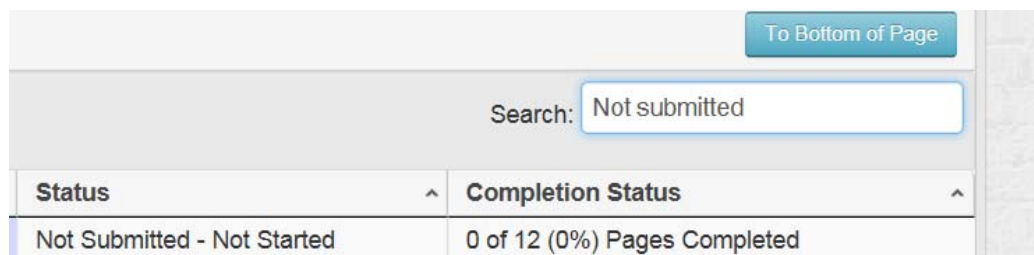
3. The Reviewer can check on the submission status of their districts' plans by running a status report. To access the Status Report, click on the dropdown arrow on the Main Menu button on the top right.



- a. If the Reviewer would like to export the Status Report to Excel, click on the Export Options: Excel button on the lower left side of the page.

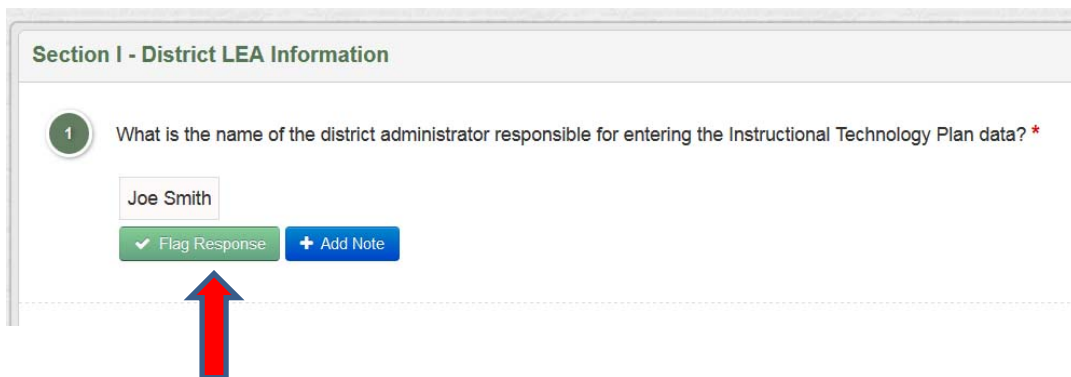


- b. If the Reviewer would like to view a subset of the plans based upon status, such as Not Submitted, Submitted or Approved, s/he can type the status into the search field and hit enter.

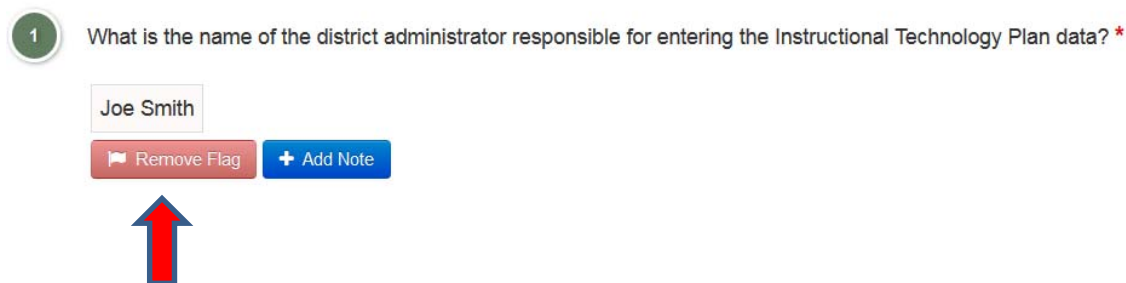


4. Flag Response Button

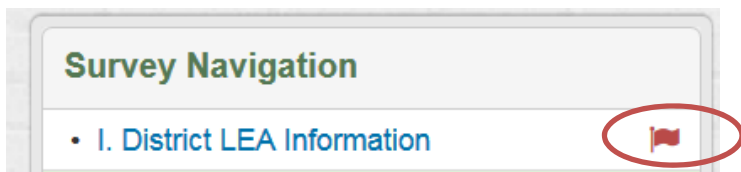
- a. This optional feature is only visible to Reviewers and NYSED. It is designed to enable the Reviewer to mark the questions s/he wishes to return to while reviewing the plan. It can be used with or without Notes. (See pages 7-9 for an explanation of the Note feature)



- i. If the Reviewer clicks on it, it turns red.



- ii. A red flag also appears marking the section in the Survey Navigation table on the left.

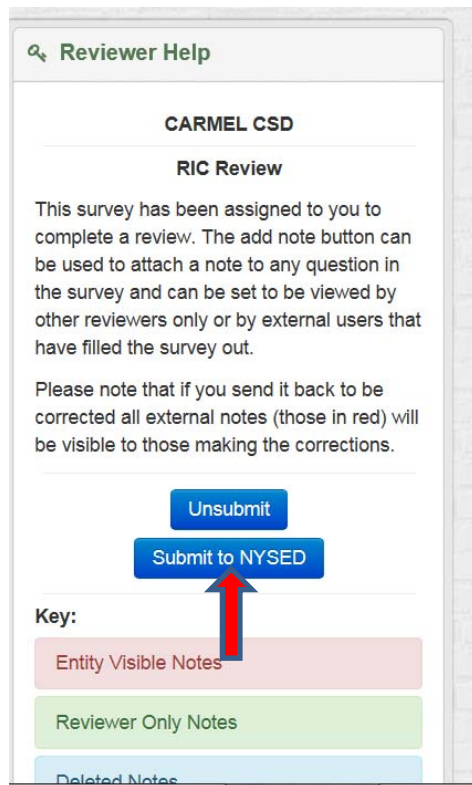


- iii. Clicking on the flag turns it back to green and removes the red flag from Survey Navigation.

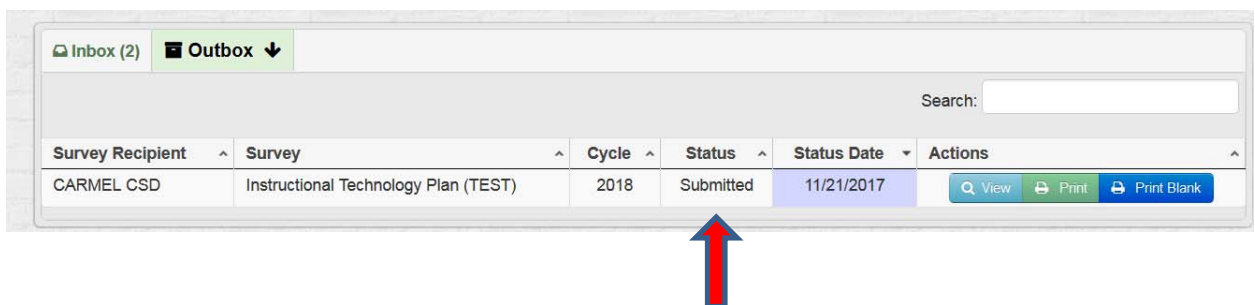
Approval Process

Reviewer Forwards Plan to NYSED for approval

1. If the RIC Reviewer is satisfied that the Tech Plan meets the criteria to be approved, s/he clicks the Submit to NYSED button and the Tech Plan goes to NYSED for the final review.



2. The Plan now appears in the RIC Reviewer Outbox with a Status of Submitted.



2. NYSED will use the 2018 [Instructional Technology Plan Review Criteria](#) to review the tech plans submitted by the RICs. This is the same review criteria that the RIC Reviewers use to review the district technology plans.

3. As part of their review, NYSED staff will read all Notes, if any, that were sent to the District by the RIC to determine if any necessary revisions have been made. For more details on Notes, see below, pages 7-9.
4. If NYSED finds no issues after reviewing the plan in the portal, the SED staff member clicks the Approve button and approves the tech plan submission.
5. After the Plan has been approved by NYSED, an approval email will automatically be generated and sent to the Superintendent, the individual who entered the plan into the portal, and all district employees with data entry rights. This approval email will be the only notification of approval sent to the District. There will be no formal approval letter sent to the District. RIC reviewers will not receive this email message and should check the Status Report to determine which plans have been approved.

Reviewer Returns Plan to District for Revisions

1. RIC Reviewer reviews the plan and decides to return the plan to the District for revision. Before the Plan is un-submitted, the Reviewer will include Notes under the question(s) that s/he would like revised. For example, if a Reviewer thinks the information entered in Question 3 is not specific enough, the Reviewer creates a Note with a suggestion for revision. To create a Note, the Reviewer clicks on the Add Note box underneath the question. Notes can only be created by RICs or NYSED.

2 What is the title of the district administrator responsible for entering the Instructional Technology Plan data? *

3

2. The Edit Note box then comes up. Type the note, choose External so that the District can view the Note, and click Save and Close.

External

Close Save Save and Close

- Notes that are visible to the District and the Reviewers (RIC and NYSED) are red. These Notes only become visible to the District when the plan is un-submitted back to them.

1 What is the name of the district administrator responsible for entering the Instructional Technology Plan data? *

Joe Smith

Joe Smith no longer works here.

officer.bigmac - 1/10/2018 3:05 PM

✓ Flag Response + Add Note Compare

- After adding the Note requesting revision(s), the RIC Reviewer then un-submits the Plan. The Unsubmit button is found on the lower left hand side of the page. The Note(s) from the RIC Reviewer will now be visible to the District under the question(s) the reviewer thinks need to be revised. Notes are only visible to the District after a plan has been un-submitted. The District will receive an email notification that the plan has been un-submitted. The District will view the un-submitted plan in its inbox.

Reviewer Help

WATERVILLE CSD

RIC Review

This survey has been assigned to you to complete a review. The add note button can be used to attach a note to any question in the survey and can be set to be viewed by other reviewers only or by external users that have filled the survey out.

Please note that if you send it back to be corrected all external notes (those in red) will be visible to those making the corrections.

Unsubmit

Submit to NYSED

- When a response has been changed by the district and the plan has been re-submitted to the RIC, the Compare button changes color from blue to orange, and the RIC and/or NYSED can compare the original response to the new response.

2 What is the title of the district administrator responsible for entering the Instructional Technology Plan data? *

3

✓ Flag Response + Add Note Compare (Changed)

6. If the RIC Reviewer has added a note under a question, un-submitted the plan and then discussed it with the District and determined that no change was necessary, the RIC Reviewer should add a “Reviewer Only” note explaining that fact for the benefit of the NYSED reviewer. Reviewer Only notes can be seen by the Reviewer and NYSED staff, not by the district. Reviewer Only Notes are green.

Edit Note

Reviewer Only

Answer satisfactory.

Close Save Save and Close

2 What is the title of the district administrator responsible for entering the Instructional Technology Plan data? *

3

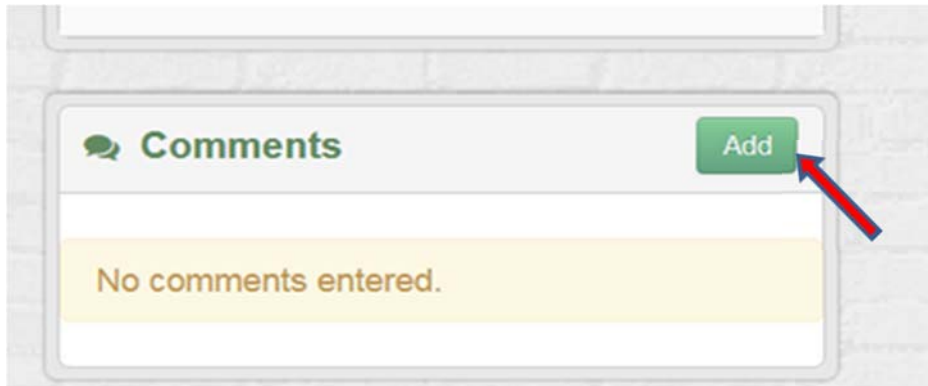
This number is not correct.

officer.bigmac - 1/10/2018 3:04 PM

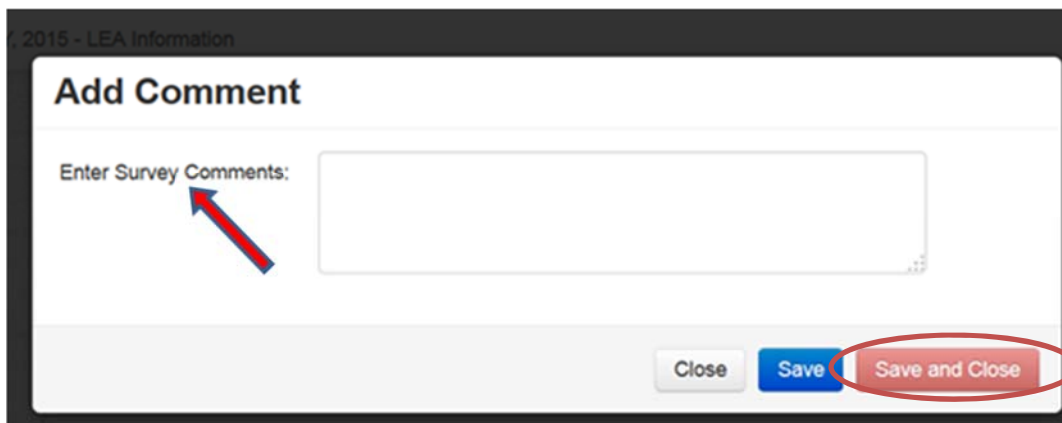
✓ Flag Response + Add Note Compare (Changed)

Comment Feature

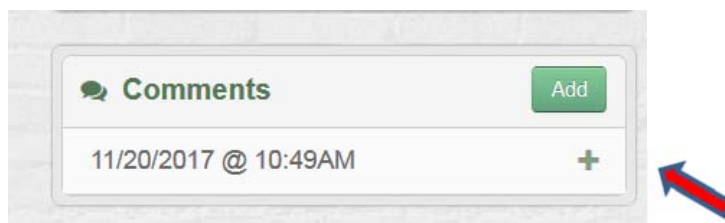
1. The Comment feature is available to the District, the RICs, and NYSED to add a general comment about the review. To add a comment, click on the **Add Comment** box on the lower left-hand side of the screen. Comments cannot be added directly below a question.



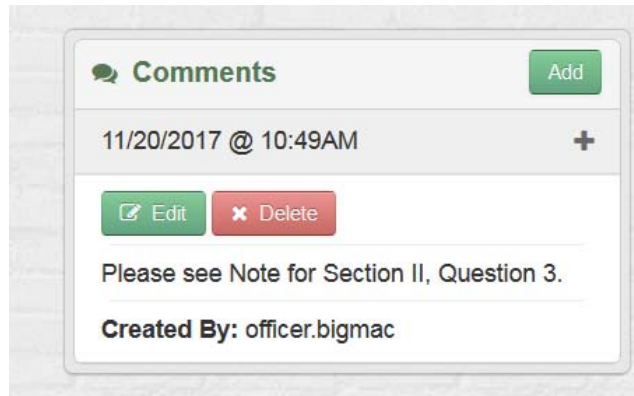
2. Type the Comment in the Plan Comment box and click **Save** or **Save and Close**.



- a. Once a plan has been submitted to a RIC, the District and the RIC Reviewer can use the Comment feature to discuss possible revisions to the tech plan (as long as the Comments are saved). It is **not** necessary for the RIC Reviewer to un-submit the plan or for the district to re-certify and re-submit it for the Comments to be visible. If the plan has **not** been un-submitted to the District, it will be visible to the District in its outbox and in the RIC's inbox.
- b. To view a comment, click on the small **plus (+)** sign on the bottom of the Survey Navigation bar on the left.



The Comment will then be visible.



3. If the district wishes to revise a response after reviewing the RIC Reviewer's comments and notes, it should correct the answer and save it. The RIC Reviewer can review the change and decide whether the response is satisfactory without the plan having to be re-certified and re-submitted. To do so, the District would need to advise the RIC Reviewer that the changes have been made and ask that they be reviewed while the plan is in un-submitted status. When a plan has been un-submitted to the District, the RIC Reviewer will find that plan in their outbox.
4. After the RIC Reviewer has reviewed the revisions and is satisfied that the plan is now approvable, s/he will ask the district to re-submit the plan, which requires the superintendent to re-certify and then re-submit it. The revised plan is submitted to the RIC via the process described on Page 2-3.
5. RIC Reviewer submits the plan to NYSED for the final review.

