Mini-Guide for RIC Reviewers

How to Review the Submitted 2022 Instructional Technology Plan

1. 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

2. If a user is entitled to several applications, they will choose Ed Tech, View Surveys for Ed Tech.

3. It is very important for the District to **Save** before moving to the next section or logging off. To be able to stay 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 also on the top or bottom of the page. All required questions must be answered before moving to the next section *in this manner*. The district may also enter some of the questions in a section, hit save, and use the navigation bar to move to another section without completing the first one.

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4. If the district staff wish to view or print their approved 2018 plan, they can do so in their Outbox.

5. **SUBMITTING THE TECH PLAN:** The district is advised by NYSED 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 based upon the RIC's interim deadline. The submittal process is a two-step process.

   a. 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 response exceeds the word limit.

   b. The Superintendent of the District certifies the plan and submits to the RIC Reviewer. Only the Superintendent can certify the plan and submit it to the RIC Reviewer. Districts are advised to contact their RIC prior to submitting the plan in the District mini-guide instructions. RIC *Reviewers* will receive an automatic email notification when the survey has been submitted by the district. *RIC Directors* will **not** receive this email notification.

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 the plan has been reviewed.

REVIEW PROCESS

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

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 Unsubmit or Send to NYSED would determine where it goes.

2. The Reviewer can also check the RIC's Status Report for submitted surveys. To access the Status Report, click on the dropdown arrow on the Main Menu button on the top right.
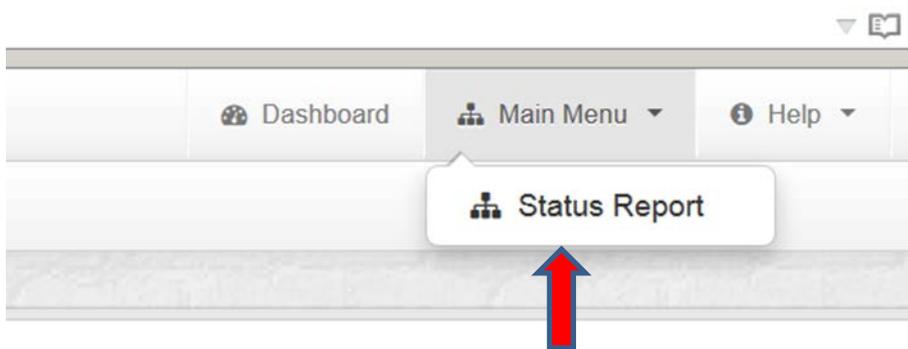
a. If the Reviewer would like to export the Status Report to Excel, click on the Export Options: Excel button on the lower left. (see screen shot on the next page)

Survey Name
Instructional Technology Plan (TEST) (Annually, 2018)
Ed Tech Workflow (Annually, 2015)
Instructional Technology Plan (TEST) (Annually, 2018)

Export options: Excel

3. 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. It can be used with or without the Note feature. It is helpful, for example, when a reviewer is making their first pass through the plan and wants to flag certain sections to be reviewed more thoroughly.

Section I - District LEA Information

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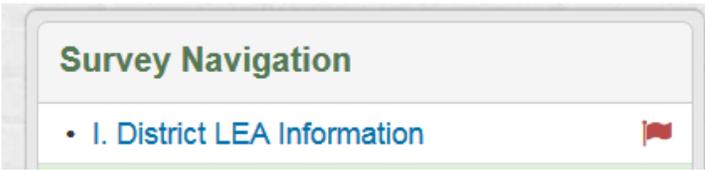
Joe Smith

✔ Flag Response   + Add Note

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

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

Joe Smith

⚑ Remove Flag   + Add Note

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

Survey Navigation

• I. District LEA Information 🚩

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

Approval Process

RIC Reviewer Approves Plan

1.   If the RIC Reviewer is satisfied with the Tech Plan Survey, s/he clicks the Submit to NYSED button and the Tech Survey goes to NYSED for the final review.

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

2.   NYSED will use the 2022 *Instructional Technology Plan Review Criteria* to review the tech plan surveys submitted by the RICs. NYSED will conduct a full, detailed review of every 12th plan that is submitted by the RIC's.

3.   As part of their review, NYSED staff will read all Notes that were sent to the District by the RIC to determine if any necessary changes have been made. Notes that are visible to the District and the Reviewers (both the RIC and NYSED) are red. When a response has been changed by the district, the Compare Changed button will be orange and NYSED can review the changes.

4.   When the RIC Reviewer has added a note under a question, discussed it with the district, and determined that no change was necessary, the Reviewer should add a "Reviewer Only" note explaining that fact. 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

Goals need no further revision.

officer.bigmac - 11/21/2017 2:05 PM

Please revise to include Goals 2 & 3 in this response.

officer.bigmac - 11/20/2017 10:48 AM

5.   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.

6.   After the survey 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. RIC reviewers with data entry rights will also receive this email message. RIC Directors will **not** receive the automated approval email. If the Director wants to receive the approval email, please see page 3 of this guide for instructions. 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.

1.   RIC Reviewer reviews the plan and may need to unsubmit the survey back to the district for revision. Before the Plan is unsubmitted, the Reviewer will include **Notes** under the question(s) that s/he would like revised. Only RICs or NYSED can create Notes. **The Reviewer can only add Notes when the plan is in Submitted Status (in the Reviewer Inbox**). For example, if a Reviewer thinks the information entered in Question 1 is not specific enough, the Reviewer creates a Note with a suggestion for revision. Reviewer clicks on Add Note.

2.   The Edit Note box then comes up. Choosing "External" means that the District, the reviewer and NYSED can see the note.

3.   The RIC Reviewer unsubmits the Plan. 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 unsubmitted. After the plan is unsubmitted, the district will receive an email notification that the plan has been unsubmitted. The district will view the unsubmitted plan in its inbox.

4.   Districts cannot create a note, but they can reply directly to a RIC reviewer's note by using the Reply button on the bottom right side of the note.
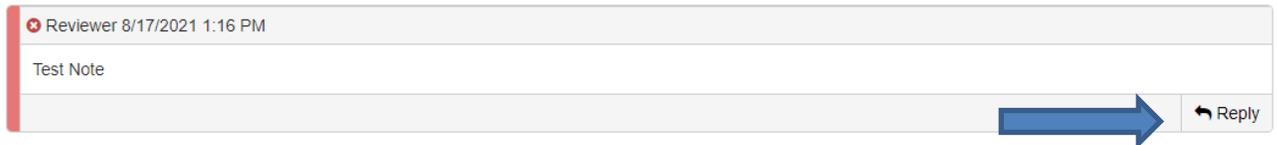
5.   **The Comment feature** is available to the District, the RICs, and NYSED to add a general comment about the review or reference a specific section and question number that need to be addressed or explained. To add a comment, click on the *Add Comment* box on the lower left-hand side of the screen below the navigation bar.
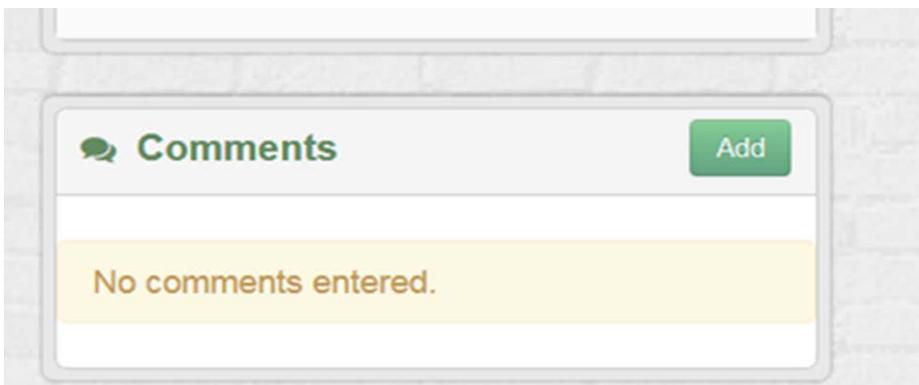

6.   Type the Comment in the Plan Comment box and click *Save* or *Save and Close*.

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 unsubmit the plan or for the district to recertify and resubmit it for the **Comments** to be visible. If the plan has not been unsubmitted to the district, it will be visible to the district in its outbox.

b.   To view a comment, click on the small *plus (+)* sign on the bottom of the Survey Navigation Bar on the left.
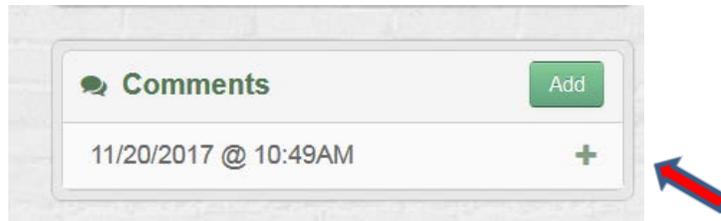
The Comment will then be visible.
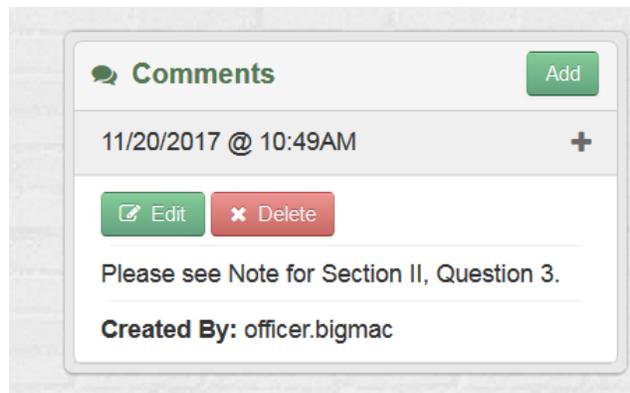
7.   If the district wishes to revise a response after reviewing the RIC Reviewer's comments and notes, it should correct the answer and save it. The RIC Reviewer can review the change and decide whether the response is satisfactory without the plan having to be re-certified and resubmitted. To do so, 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.

8.   After the RIC Reviewer has reviewed the revisions and is satisfied that the plan is now approvable, s/he will ask the district to resubmit the plan, which requires the superintendent to re-certify and re-submit it. The revised plan is submitted to the RIC via the process described on Page 2-3.

9.   If the RIC Reviewer is satisfied that the plan is approvable, Reviewer submits the plan to NYSED for the final review.