PlanWorks®
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Creating Plans

- Create a new plan using ➕ icon; Enter Name, Type/Location, School Year, Review/Approve Dates, Title 1, Click to Use ESF
    - * Lock Plan, or add users to access plan
- OR from Search - Locate plan, ✏️ to edit plans

SEARCH ICONS

- ✏️ Edit Plan
- 🗎 Copy a plan; edit Type/Location, Year and Name
- ❌ Delete plans from the list; plans can be restored after deleted
- Click Deleted Plans (bottom) and 🔄 to restore

PLAN ICONS

- ➕ Add sections to your plan (Cover Sheet, Vision, SiteBase, Resources, Goals/Objective/Strategies, Custom, Needs Assessment, Attachments or Forms – click all that apply, click add)
- 🥧 Plan Overview
- ✏️ Edit plan piece
- ❌ Delete page
- ✔️ Mark page complete for your checklist
- ☷ Checklist – View all complete/incomplete sections of the plan
- ⚙️ Plan Settings – Click to modify plan dates/users/access to plan
- 🖨️ Print: Click to print or save as .pdf

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Additional Features

COMPREHENSIVE NEEDS ASSESSMENT

- Add CNA page
    - * ✎ Focus Area to add Strengths, Weaknesses, Needs and Summary
    - * Click Data Sources to check the sources used; click save
    - * ➕ Upload Files
    - * Mark complete: click to mark area complete
- ➕ Meetings
    - * Print blank sign in sheets, or one with attendees
    - * Add Minutes and Agenda Items

ADDITIONAL FEATURES

- Add text-based Notes (bottom of the screen)
- 📎 Upload Files on far left of screen or add new attachments section to plan with Pages
- 📄 Online Forms (integrated with FormWorks®) can be added on the left of the screen or click add new on top right to insert Forms section within Pages
- Monitor Strategy Progress with multiple graphs and charts

CUSTOMIZING SETTINGS

- Any District/Campus Admin can edit settings:
    - * General – Lock campus access
    - * Resources/Data Sources – Select from master list and/or add new resources
    - * Positions Responsible – Select from master list and/or add new positions

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