

Guide to eTemplate Functionality

California Department of Education

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Introduction to the eTemplate System

The eTemplate is an online system designed to support county offices of education (COEs), school districts, and charter schools (LEAs) in the development of their Local Control and Accountability Plan (LCAP). Access to the system is based on an LEA's CDS code and is limited to those who have been assigned a specific user role within the system. Those with a user account may log in to the eTemplate system at <https://lcaptemplate.org>.

Except during site maintenance, the system is up and available to the user at all times. The eTemplate has all the same prompts, instructions, and guiding questions as does the Word document version.

Note: User's will be automatically logged out of the system after three hours. To prevent data loss please save your work regularly.

This guide describes current functionality in the eTemplate system. It will be updated and revised as additional functionality is added to the system. Questions related to the eTemplate system may be directed to the eTemplate Support Team by email at eTemplate@cde.ca.gov.

The eTemplate navigation uses links to open specific items. The browser forward and back arrows are supported in the eTemplate, however they are not recommended for use during data entry.

The eTemplate Dashboard

The Dashboard is the landing screen after logging on. The options available on the dashboard will differ depending on the role of the user. The Dashboard pictured below (Figure 1) is that of a Coordinator.

Figure 1. The eTemplate Dashboard

The screenshot shows the eTemplate Dashboard for a Coordinator. At the top, there is a header with the California Department of Education logo and name, and navigation links for 'Dashboard' and 'Logout'. Below the header, the user is greeted with 'Welcome eTemplate Coordinator' and their role 'Coordinator for Tyler School'. There is a link to '+ Create a New Coordinator Account'. Below this, there are three tabs: 'LCAPs', 'Users', and 'My Account'. The 'LCAPs' tab is selected, displaying a table with the following data:

LEA ↕	CDS ↕	Total Years	Current Year	Status ↕	
Tyler School	333333333333	3	2018-19	Draft	

The Dashboard displays the name and role of the user, a link return to the eTemplate Dashboard, and a link to log out.

Tabs

Tabs labelled 'LCAPs' and 'My Account' have been added beneath the name and role of the user. LEA eTemplate Coordinators (Coordinators) have an additional tab labeled 'Users'. The 'Users' tab will be discussed later in the document under the Coordinator role. Selecting a tab allows the user to navigate between the different functions of the eTemplate system.

The LCAP Tab

The 'LCAP' tab, shown above in Figure 1, will display the name and CDS code of the LEA(s) to which the user has been assigned, as well as the total number of years the LCAP has been set for, the current LCAP year, and the status of the LCAP. Users may sort the 'LEA', 'CDS', and 'Status' columns using the up and down arrows to the right of

the column headings. Following the LCAP status is a link to the LEAs data reports in the California Schools Dashboard, indicated by a dial icon (📶), and a link to create the LEAs LCAP, indicated by a plus (+) symbol, or edit the LEAs LCAP, indicated by a pencil icon (✎). Users assigned to more than one LEA also have the option to search for an LEAs LCAP using the 'Filter Forms' field (not pictured).

The My Account Tab

The 'My Account' tab, shown below in Figure 2, will display the users first and last name, title, phone number, and email address as well as the option for the user to change their password.

Figure 2. The 'My Account' Tab

The screenshot shows the 'My Account' tab selected in a navigation menu. The page is divided into two main sections: 'User Information' and 'Change Password'. In the 'User Information' section, there are five input fields: 'First Name*' (containing 'eTemplate'), 'Last Name*' (containing 'Coordinator'), 'Email*' (containing 'lcff@cde.ca.gov'), 'Title*' (containing 'Coordinator'), and 'Work Phone*' (containing '555-555-5555'). Each field has a green checkmark to its right, indicating it is valid. Below these fields is a note: 'All fields marked with an asterisk (*) are required'. A blue 'Update Account' button is positioned below the note. The 'Change Password' section contains two empty input fields: 'New Password:' and 'Confirm Password:'. A blue 'Update Password' button is located at the bottom of this section.

Users may change their first and last name, title, phone number, and email address by entering the changes and selecting the 'Update Account' button.

Users may update their password by entering a new password in both the 'New Password' and 'Confirm Password' fields and then selecting the 'Update Password' button.

User Roles

There are currently three user roles in the eTemplate; one more will be added. Each role is described below.

Coordinator

The Coordinator is responsible for managing users at the LEA-level and disseminating information on the eTemplate system to applicable staff at the LEA. A Coordinator may also add additional Coordinators for the LEA. LEAs are encouraged to have two Coordinators in the event that the primary Coordinator is unavailable. Adding additional Coordinators is discussed below.

Each Coordinator account is unique. A Coordinator for multiple LEAs must use a unique password for each LEA and must log in to each LEA individually.

The Users Tab

The 'Users' Tab, Shown below as Figure 3, will only display for Coordinators. The 'Users' tab will display the name, email, phone number, LEA, and role of the LEAs users. From the 'User' tab the Coordinator may add a new user to the LEA, edit a user, reset a user's password, or delete a user.

Figure 3. The 'Users' Tab

Name	Email	Phone	LEA	Role	
ETemplate Coordinator	lcff@cde.ca.gov	555-555-5555	Tyler School	Coordinator	
ETemplate Submitter	lcapreview@cde.ca.gov	555-555-5555	Tyler School	Submitter	

To edit a user select the 'Edit User' pencil icon () to bring up the 'Edit User' pop-up window. From the 'Edit User' window changes may be made to the user's first and last name, title, phone number, and email address; select the 'Update User' button to save the changes and return to the 'Users' tab.

Resetting a user's password will generate a new random password for the user and email the password to them. To reset a user's password select the 'Reset User Password' lock icon (). A dialogue box will appear asking the user to confirm the

resetting of the user's password. Select 'OK' to reset the user's password or 'cancel' to keep the current password.

To delete a user select the blue trash-can icon (🗑️). A dialogue box will appear asking the user to confirm the deletion of the user. Select 'OK' to delete the user or 'cancel' to keep the user.

Adding a Submitter

Only a Coordinator may add a submitter to an LEA. To add a new submitter

1. select the 'Add New User' button on the 'Users' menu to display the 'Add User' pop-up window;
2. provide the user's first and last name, title, phone number, and email address;
3. select 'Submitter' as the user role; and
4. select 'Submit' to save. To exit without saving, select the "x" in the top right corner of the pop-up window.

When a user is assigned to a submitter role they will receive an email generated by the system informing them of the new user role. If the user is new to the eTemplate system they will be provided with a randomly generated password that they can use to initially log on to the system.

Adding a Reviewer

Only a COE or charter school Coordinator may add a reviewer. COEs will add reviewers for districts within their county; charter schools will add reviewers for their charter school. To add a reviewer

1. select the 'Add New User' button on the 'Users' menu to display the 'Add User' pop-up window;
2. provide the user's first and last name, title, phone number, and email address;
3. select 'Reviewer' as the user role and specify the LEA that the user will be reviewing; and
4. select 'Submit' to save. To exit without saving, select the "x" in the top right corner of the pop-up window.

When a user is assigned to a reviewer role they will receive an email generated by the system informing them of the new user role. If the user is new to the eTemplate system they will be provided with a randomly generated password that they can use to initially log on to the system.

Adding a Coordinator

A Coordinator may also add additional Coordinators for the LEA. To add a new coordinator for the LEA select the 'Create a New Coordinator Account' link on the Dashboard. In the 'Template Admin Application' pop-up window provide the following:

1. first and last name;
2. title;
3. work phone number and email address;
4. identify the LEA; and
5. Select 'Submit' to save. To exit without saving, select the 'Dashboard' link at the top of the web page.

After saving, a pop-up window will notify the Coordinator that the request was successful or identify any error with the request.

A successful request will generate an email from the system informing the newly assigned coordinator that they have been activated in the system. The email will also contain a temporary password for the new Coordinator.

Again, please note that each Coordinator account is unique. A Coordinator for multiple LEAs must use a unique password for each LEA and must log in to each LEA individually.

Submitter

Users with the submitter role have the ability to create a new draft LCAP for the LEA, edit the LEA's draft LCAP, and submit the LEA's draft LCAP for review and approval. Editing and submitting an LCAP are discussed later in this document.

Reviewer

The reviewer role is available only to COEs, charter schools, and the California Department of Education; it is not available to school districts. Reviewers are responsible for reviewing a submitted LCAP to determine that it meets the applicable approval criteria. Functionality for the review and approval of an LCAP is currently under development. During the development period reviewers will be limited to read-only access to the LCAP(s) to which they are assigned. Full functionality for reviewers will be available in May of 2018.

In the current system

- A Reviewer can be assigned to review multiple LCAPs.
- Multiple Reviewers can be assigned to each LCAP.
- Each Reviewer may have one LCAP open in the system at a time, however multiple Reviewers can work on the same LCAP concurrently.

- A Reviewer may close one LCAP and open another LCAP without logging out of the system.

The reviewer for a school district must be assigned by that school district's COE. A charter school assigns its own reviewer. While not required, it is suggested that the charter school administrator serve as the reviewer/approver for the charter school LCAP.

Creating an LCAP

Note: Only users with the role of Coordinator or Submitter will be able to create a draft LCAP.

To create a draft LCAP select the "Create LCAP" link, indicated by a plus (+) symbol. The 'Create New LCAP' dialogue box will inform the LEA that they are about to create a new LCAP and will ask the LEA to select the starting year for the LCAP.

For the 2018-19 year of the LCAP cycle school districts and COEs should select a start year of 2017-18 and should complete a 3-year LCAP.

Charter schools will be asked to indicate the length of the term of the LCAP, either one, two, or three years. For the 2018-19 year of the LCAP cycle charter schools should select from the following combinations:

- A 1-year LCAP starting in 2018-19
- A 2-year LCAP starting in 2018-19
- A 3-year LCAP starting in 2017-18

NOTE: Users will be unable to provide data for any year(s) prior to the selected starting year.

To create a new draft LCAP select the 'Continue to LCAP' button; a new draft LCAP will open.

The LCAP will open to the 'LCAP Template Info' section. At the top of this section are links to the LCAP Template Addendum, containing the instructions for completing the LCAP, and to the Appendices, with instructions for calculating rates for LCFF State Priorities 5 and 6, and Guiding Questions. There is also a link to the LEA's data reports in the California School Dashboard. Links to instructions for specific sections of the LCAP are also found in each of the sections of the eTemplate, denoted by an 'i' in a blue circle (i). Each of these links will open in a new tab of the web browser.

From the LCAP template, select the 'Dashboard' button at the top of the page at any time to navigate back to the eTemplate dashboard.

In the 'LCAP Template Info' section provide the contact information for the LEAs LCAP, including the contact name, title, phone number, and email address. Select the 'Save and Continue' button to save the data and navigate to the next section of the LCAP.

Navigating the LCAP

Use the LCAP Template menu to navigate to each of the different sections of the LCAP. The sections in the LCAP are the

- LCAP Template Info,
- Plan Summary,
- Annual Update,
- Stakeholder Engagement,
- Goals, Actions, and Services, and
- Demonstration of Increased or Improved Services for Unduplicated Pupils (abbreviated as 'Unduplicated Pupils' on the LCAP Template Menu)

Select a section of the LCAP to navigate to that section. If there are empty data fields in the current section a dialogue box will notify the user that the section is incomplete and ask if they would like to save and continue anyway. Select 'OK' to navigate to a new section or cancel to stay in the current section.

The LCAP Template menu will display sections that are complete with a green check mark (✔) and sections that are incomplete with a red 'X' (✘). The LCAP Template menu displays the number of LCAP sections that are complete and incomplete in corresponding green and red circles at the top of the menu.

Note: User's will be automatically logged out of the system after three hours. To prevent data loss please save your work regularly.

Quick Clips (New)

Additional support is provided through the inclusion of short videos, or "quick clips", that address specific parts of the LCAP. These quick clips elaborate on the LCAP Template instructions and provide suggestions for crafting a well-written LCAP.

Quick clips can be played by selecting the 'Play Video' link (▶ Play Video) located adjacent to the particular section that the quick clip addresses. Selecting the 'Play Video' link will open the quick clip video in a separate window. To close the video and return to the eTemplate select the 'X' in the top right corner of the video.

The quick clip videos are housed on a YouTube channel and videos may be accessed from outside of the eTemplate system. LEAs are free to use the videos as part of stakeholder engagement or professional learning.

Editing the LCAP

Note: Only users with the role of Coordinator or Submitter will be able to edit a draft LCAP.

In each section of the LCAP address the specific requirements described in the LCAP template instructions.

The Plan Summary, Stakeholder Engagement, and Unduplicated Pupils sections contain text fields that allow an LEA to respond to the prompts. Currently these text fields are limited to 32,000 characters, however this limit will be expanded in a future update.

The Annual Update and Goals, Actions, and Services sections contain additional functionality and are discussed below.

To comply with federal Section 508 accessibility standards the eTemplate system does not currently allow for the use of text formatting, such as bold or italicized fonts and bullet lists, or the importing of charts or graphics. Options for integrating these functionalities are being explored.

Data fields do not need to be completed all at once. Users can save their work at any point and continue their work later. To save, select the 'Save and Continue' button at the bottom of each section. If the user attempts to navigate to a different section the system will warn them that the section is incomplete and ask them if they would like to save and continue. Select 'OK' to save and navigate to a different section or 'cancel' to stay on the page.

Note: User's will be automatically logged out of the system after three hours. To prevent data loss please save your work regularly.

The Annual Update

In the first year of using the system the LEA will need to input the goals, expected outcomes, actions and services, and budgeted expenditures from the prior-year LCAP into the Annual Update.

In subsequent years the eTemplate system will prepopulate this information; the LEA will only provide responses for the actual outcomes, actual actions and expenditures, and the analysis portions of the Annual Update. For this reason references to adding or deleting goals and actions in the Annual Update are only applicable to an LEA in its first year of using the system.

Adding or deleting a goal

To add a Goal select 'Evaluate a New Goal'. To edit a goal select the goal from the Annual Update menu. To delete a goal select the blue trash-can icon () adjacent to the goal number. A dialogue box will appear asking the user to confirm the deletion of the goal. Select 'OK' to delete the goal or 'cancel' to keep the goal.

To add additional annual measureable outcomes, select the 'Add New Outcome' button. To delete an annual measureable outcome select the red trash-can icon () adjacent

to the action number. A dialogue box will appear asking the user to confirm the deletion of the action. Select 'OK' to delete the action or 'cancel' to keep the action.

Note: Users should avoid working on the same Goal at the same time, as users may save over each other's work, resulting in a loss of data.

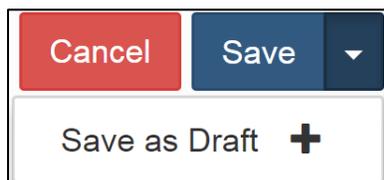
Actions and services

To add an action to the goal select the 'Add New Action' button. To delete an action select the red trash-can icon (🗑️) adjacent to the action number. A dialogue box will appear asking the user to confirm the deletion of the action. Select 'OK' to delete the action or 'cancel' to keep the action.

Saving

An incomplete goal may be saved as a draft. Scroll down to the 'Save' button, select the drop-down arrow, and select 'Save as Draft' (pictured below in Figure 4). The goal will be saved as a draft and the user will be returned to the Annual Update menu. The goal will be marked as incomplete in the Annual Update Menu to remind Submitters that there is additional work to do on the goal. Select 'Cancel' to remain on the page.

Figure 4. 'Save as Draft'



When the goal is complete, select the 'Save' button. The goal will be saved and marked as complete. Once all the LEA's goals from the prior-year have been entered and responded to select the 'Save and Continue' button in the Annual Update goal menu.

Goals, Actions, and Services

In the first year of using the system the LEA will need to input the goals, expected annual measurable outcomes, actions and services, and budgeted expenditures. In subsequent years the LEA may edit the data for the upcoming year(s), however the expected outcomes, actions and services, and budgeted expenditures from the prior year(s) will be locked for editing.

Note: Users should avoid working on the same Goal at the same time, as users may save over each other's work, resulting in a loss of data.

Adding or deleting goals

To add a Goal select 'Create a New Goal'. To edit a goal select the goal from the menu. To delete a goal select the blue trash-can icon adjacent to the goal number. A dialogue

box will appear asking the user to confirm the deletion of the goal. Select 'OK' to delete the goal or 'cancel' to keep the goal.

Use the radial buttons at the top of the goal to identify whether the goal is new, modified, or unchanged; use the checkboxes to identify the state priorities addressed by the goal. Use the text fields to respond to the other prompts and complete the expected annual measureable outcomes. An LCAP must contain at least one expected annual measureable outcome per goal.

To add additional expected annual measureable outcomes, select the 'Add New Expected Outcome' button. To delete an expected annual measureable outcome select the red trash-can icon adjacent to the action number. A dialogue box will appear asking the user to confirm the deletion of the action. Select 'OK' to delete the action or 'cancel' to keep the action.

Actions and services

To add an action to the goal select the 'Add New Action/Service' button. To delete an action select the red trash-can icon adjacent to the action number. A dialogue box will appear asking the user to confirm the deletion of the action. Select 'OK' to delete the action or 'cancel' to keep the action.

After adding a new action the user will be asked to indicate if the action/service is contributing or not contributing to meeting the Increased or Improved Services Requirement by selecting 'Contributing' or 'Not Contributing'. The option selected will determine the prompts that open. Use the radial buttons to respond to the prompts. If a prompt requires additional information a text field will open to allow for additional information to be provided.

For each year of an Action/Service use the radial buttons to indicate if the action is 'new', 'modified', or 'unchanged'. If the action/service for a subsequent year is identified as 'unchanged' the text field and budgeted expenditure fields for that year will no longer appear. Instead the system will copy the data from the last visible year into the final LCAP document. Select 'Save Action' to save the action.

Saving

An incomplete goal may be saved as a draft. Scroll down to the 'Save' button, select the drop-down arrow, and select 'Save as Draft'. The goal will be saved as a draft and marked as incomplete. This reminds Submitters that there is additional work to do on the goal.

When the goal is complete, select the 'Save' button. The goal will be saved and marked as complete. Select the 'Save and Continue' button in the goal menu once all the LEA's goals have been completed.

Printing an LCAP (New)

The eTemplate system will generate a printable PDF of the LCAP, or a section of the LCAP, for purposes of stakeholder engagement.

To print the LCAP, select the 'generate PDF' icon () on the LEAs dashboard. The system will generate a PDF document of the LCAP as it currently exists, formatted to the SBE-adopted template. Once the PDF is generated it may be saved or printed.

To print a specific section of the LCAP select the print icon () located in the heading of the section that you want to print. The system will generate a PDF of the selected section as it currently exists, formatted to the SBE-adopted template. Once the PDF is generated it may be saved or printed.

Submitting an LCAP for Review and Approval

An LCAP may only be submitted once it meets the minimum system requirements for an LCAP in the eTemplate system. Meeting the minimum system requirements does not mean that the LCAP meets the approval criteria for an LCAP; it means that all applicable data fields have been completed. Once the system verifies that the minimum system requirements have been met the 'Submit LCAP' option will appear at the bottom of the LCAP Template menu.

Upon selecting 'Submit LCAP' the user will be notified that they are about to submit the LCAP for review and approval. Select 'Submit for Approval' to submit the LCAP. Once submitted the LCAP will be locked for editing and the applicable reviewer(s) will be notified of the submission.

As previously stated, functionality for the review and approval of an LCAP is currently under development. During this development period reviewers will be limited to read-only access to the LCAP(s) to which they are assigned. Full functionality for reviewers will be available in May of 2018.