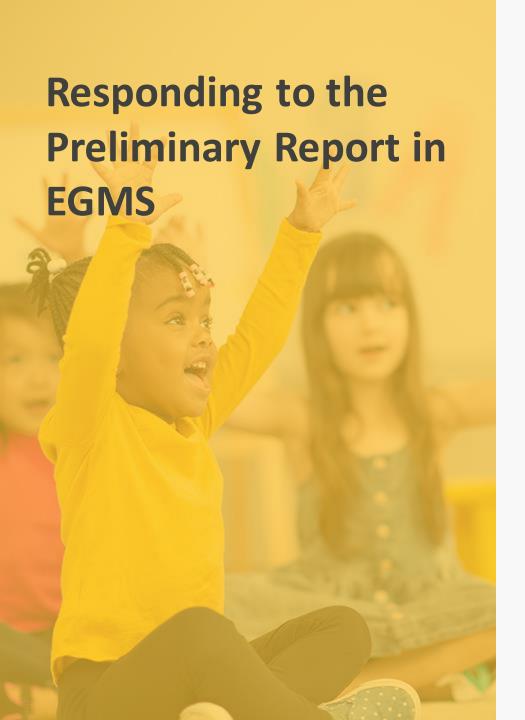
EGMS Program Reviews

Organizations and LEAs

Instructions Part 3: The Exit & Follow-Up Process





Content

Instructions

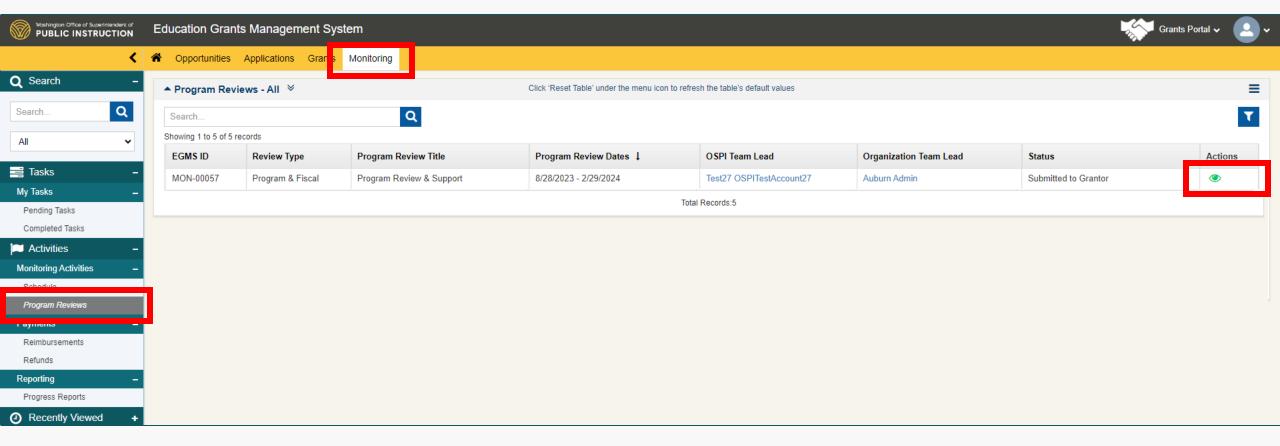
- Reviewing Final Determinations
- Accessing and Responding to Follow-Up Item
- Notifying OSPI of Evidence Submission
- Identifying Approved Items in Follow-Up Tab
- When Additional Assistance is Needed



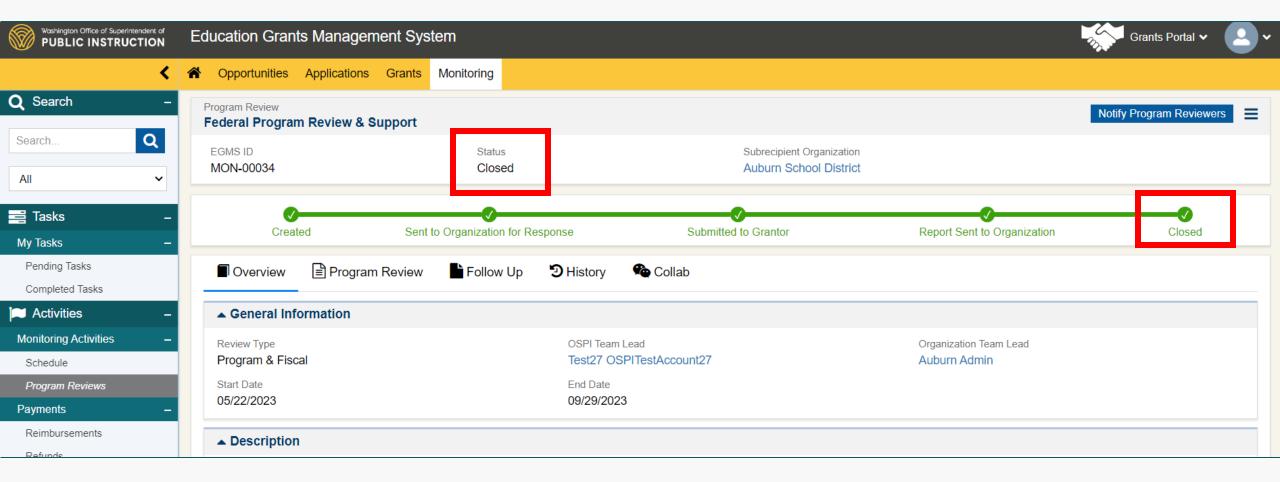
Reviewing Final Determinations

To view the final determinations, Organization/LEA users will need to open the Program Review.

- 1. Click on Monitoring tab
- 2. Program Reviews (in left menu)
- 3. View icon (green eye)



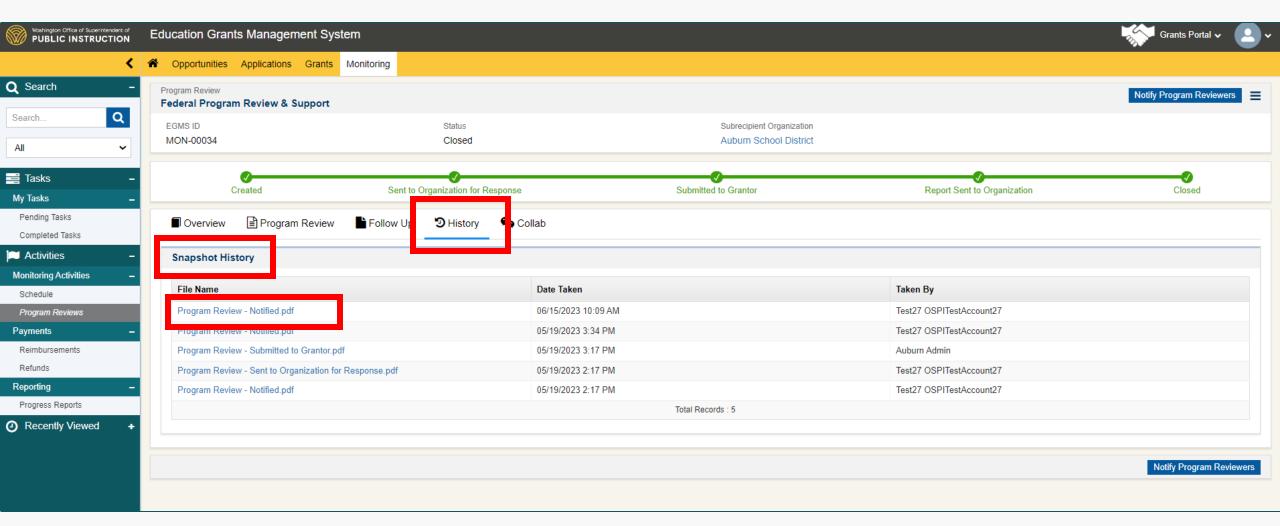
At the time of your Exit meeting, the Review will be closed. You will notice that the status bar indicates the Review is closed.





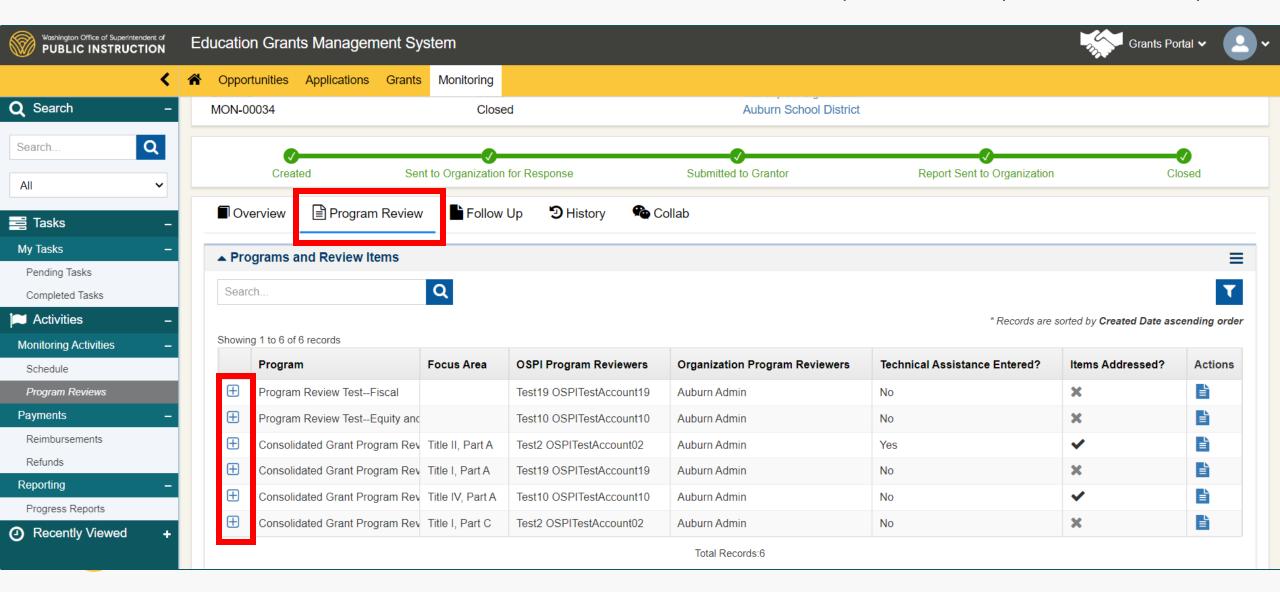
One way to view the determinations at the time of the Exit meeting is to review the Snapshot History.

- Click on the History Tab
- Click on the most recent pdf file to view the snapshot of the Program Review at the time it was closed.



Another way to view the determinations at the time of the Exit meeting is to look through the Program Review Tab.

- Click on the Program Review Tab
- Click on the plus icon to expand and review each program checklist.
- Note, that this Tab is locked, and items cannot be edited or added to. All edits and uploads now take place in the Follow-up Tab.

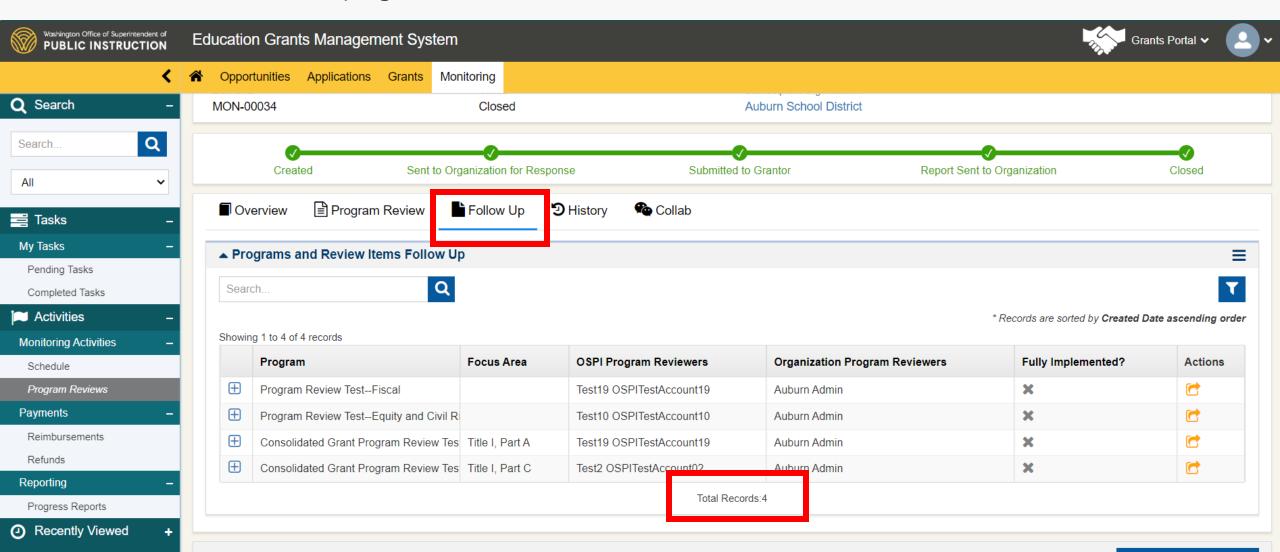




Accessing and Responding to Follow-up Items

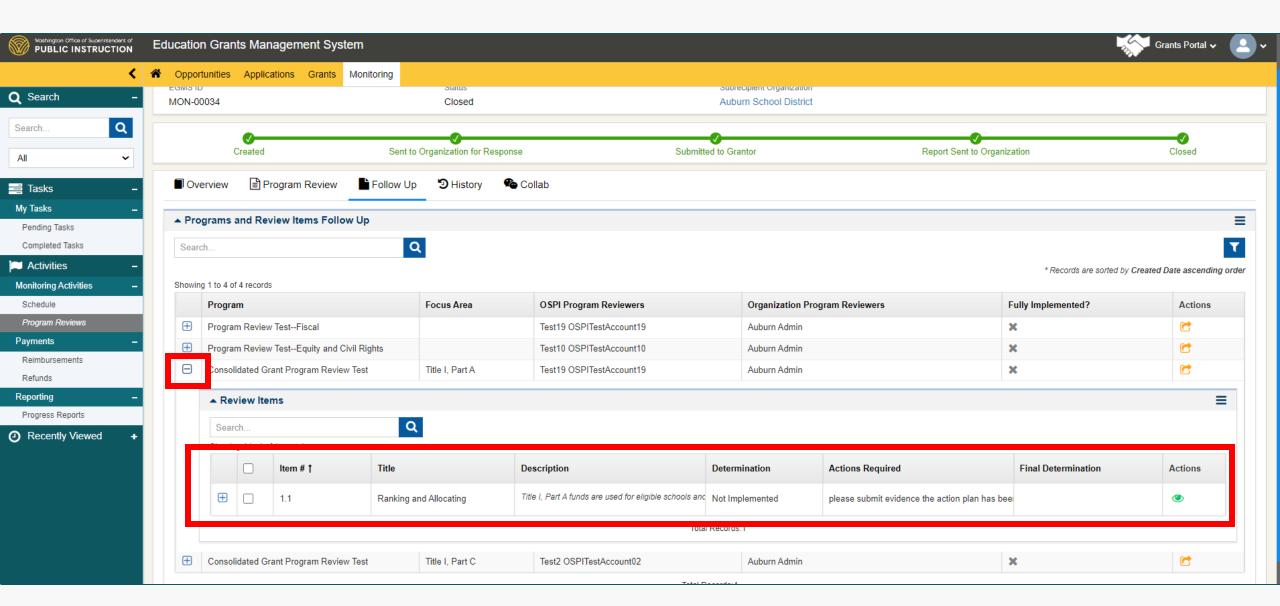
When a Program Review closes, there may be some items that have not been fully implemented. These items remain in their final status until the LEA/Organization fully implements the requirement, uploads evidence, and notifies OSPI. To view the remaining items, click on the Follow-up Tab.

You'll notice from a previous slide that there were six programs under review. In the Follow-up Tab you can see items remain in four of those program checklists.



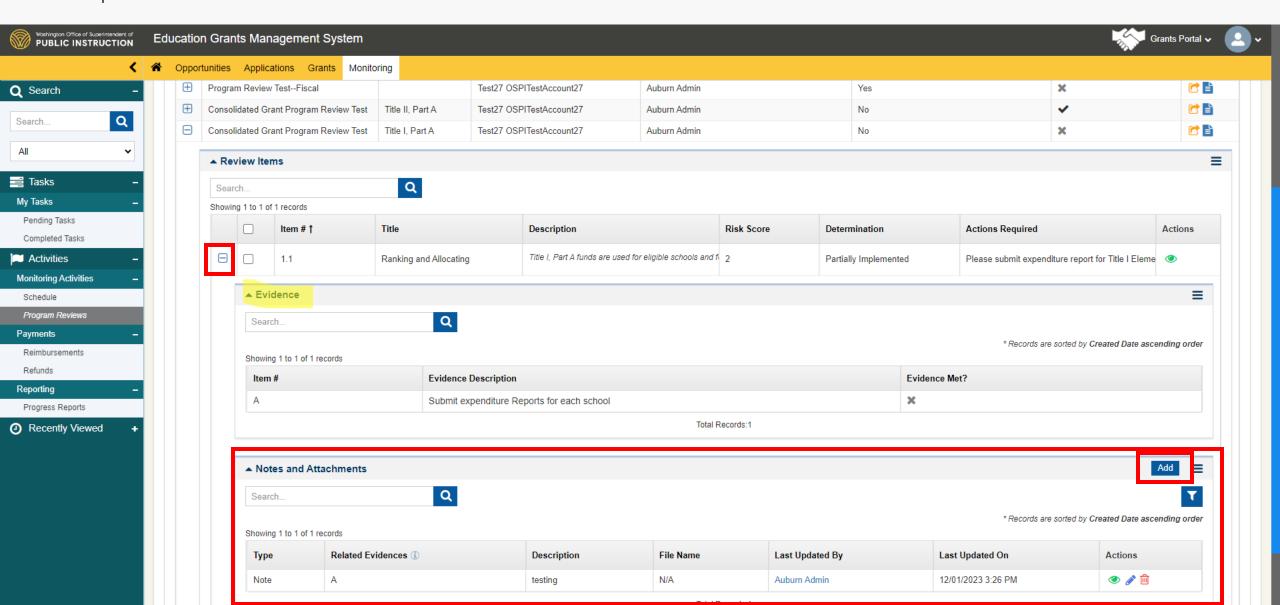
Once you fully implement an item, you can upload evidence of that in the same manner that you did during the Review. The difference now, is that you do that in the Follow-up Tab.

• Click on the plus icon for the appropriate program to view the remaining item(s)



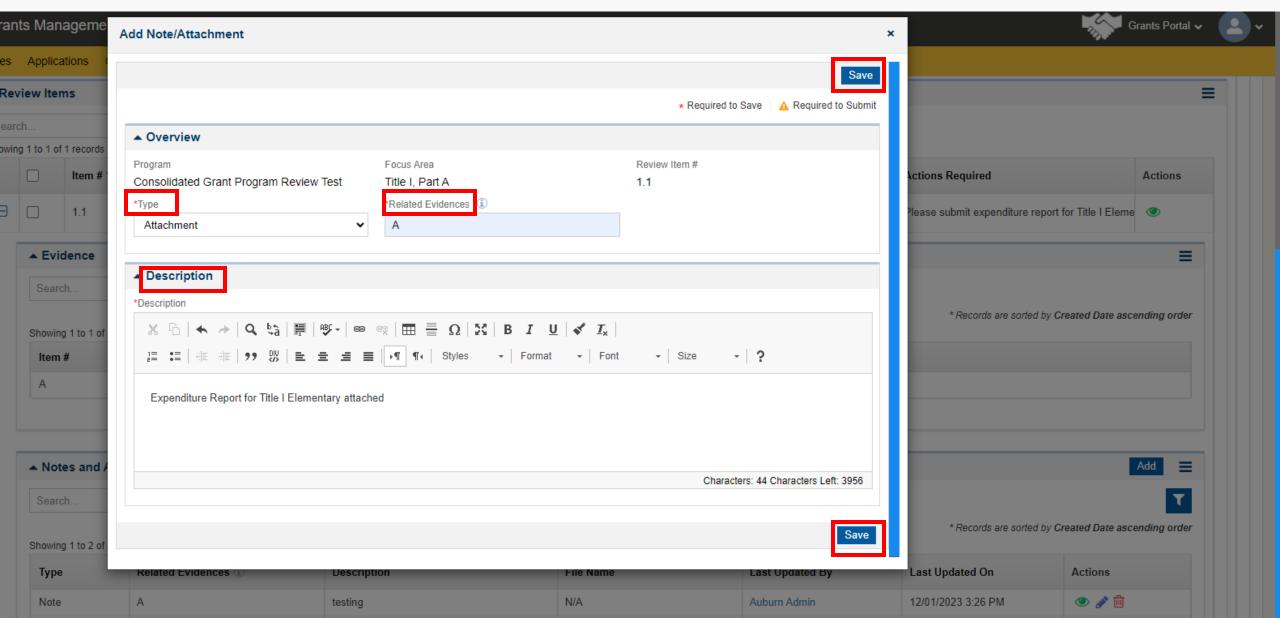
To upload Notes or Attachments in response to those requirements, the LEA can do the following:

- 1. Click on the plus icon to expand the Review Items, displaying the "Evidence" and the "Notes and Attachments" sections.
- 2. Click on the "Add" button in the "Notes and Attachments" to upload a note or an attachment that reflects the actions required.



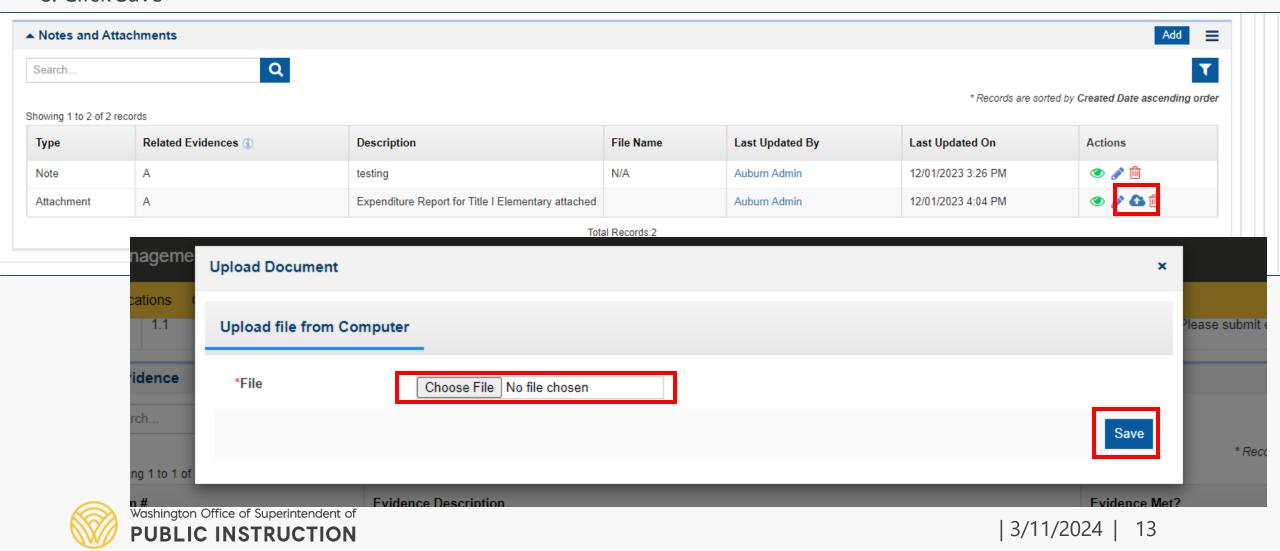
A window (Add Note/Attachment) will pop-up.

- 3. Complete each field (Type, Related Evidence, and Description) in the window and
- 4. Click Save



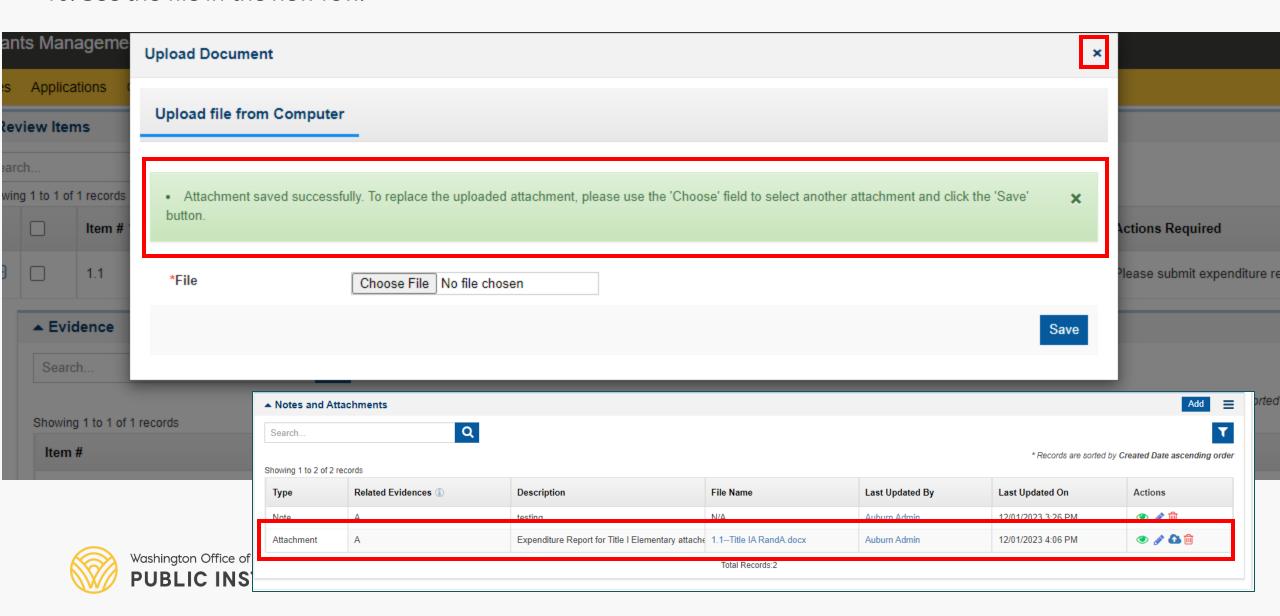
If selected "Attachment" in the Type field, a new action icon allowing to upload the file will pop-up.

- 5. Click on the Upload Document Actions icon (blue cloud with up arrow).
- 6. In the pop-up window click on "Choose File".
- 7. In the folder pop-up, select the appropriate document from your files.
- 8. Click Save



Pop-up window will confirm the attachment was uploaded successfully.

- 9. Close the pop-up window
- 10. See the file in the new row.





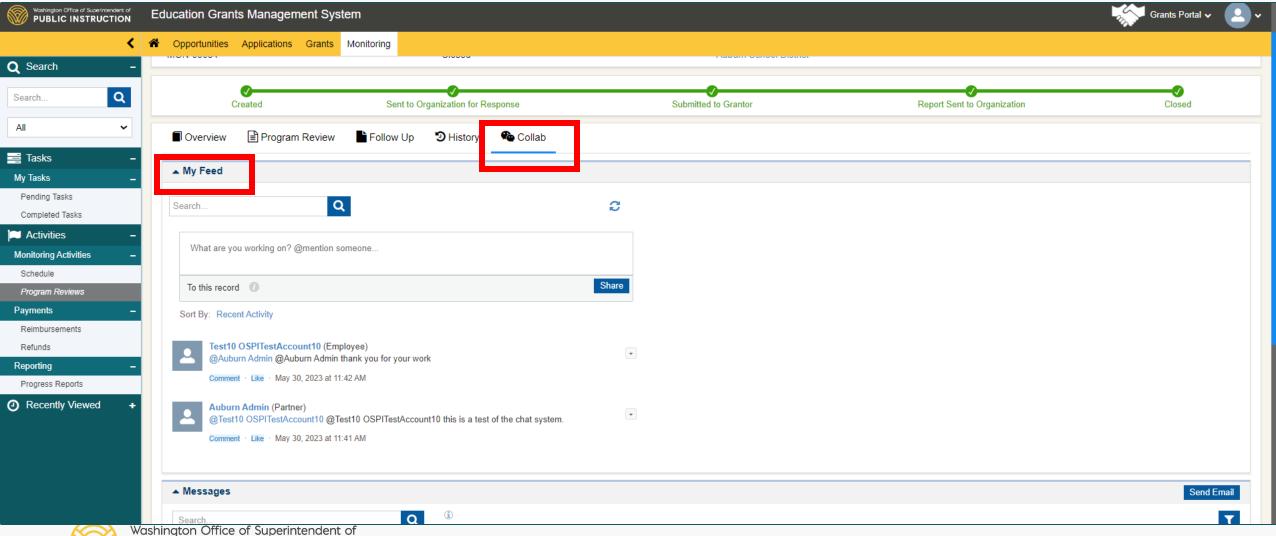
Notifying OSPI of Evidence Submission

After the evidence of implementation has been uploaded, you will need to notify the Program Review for that program that you have submitted evidence. You notify them of the submission by sending a Chat.

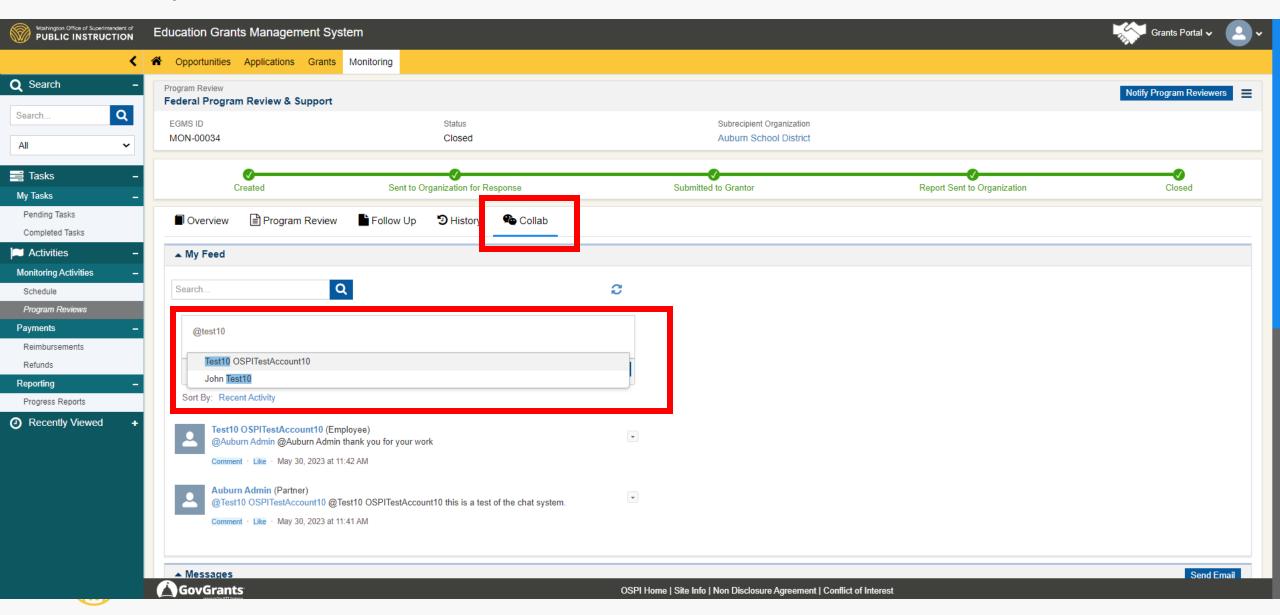
Click on the Collab Tab

PUBLIC INSTRUCTION

Click into the Chat text box in the My Feed section to identify the Program Reviewer and type your message.

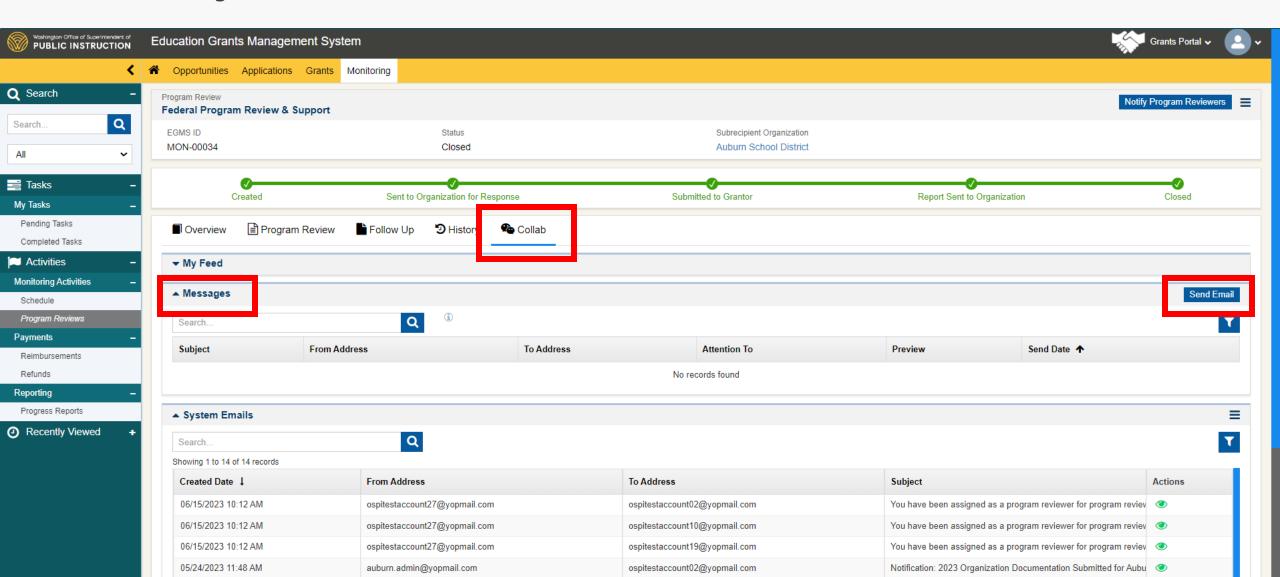


Notice that when you type the @ and begin typing the recipient's name the system will display options to select from. This only works for staff who have an EGMS license.



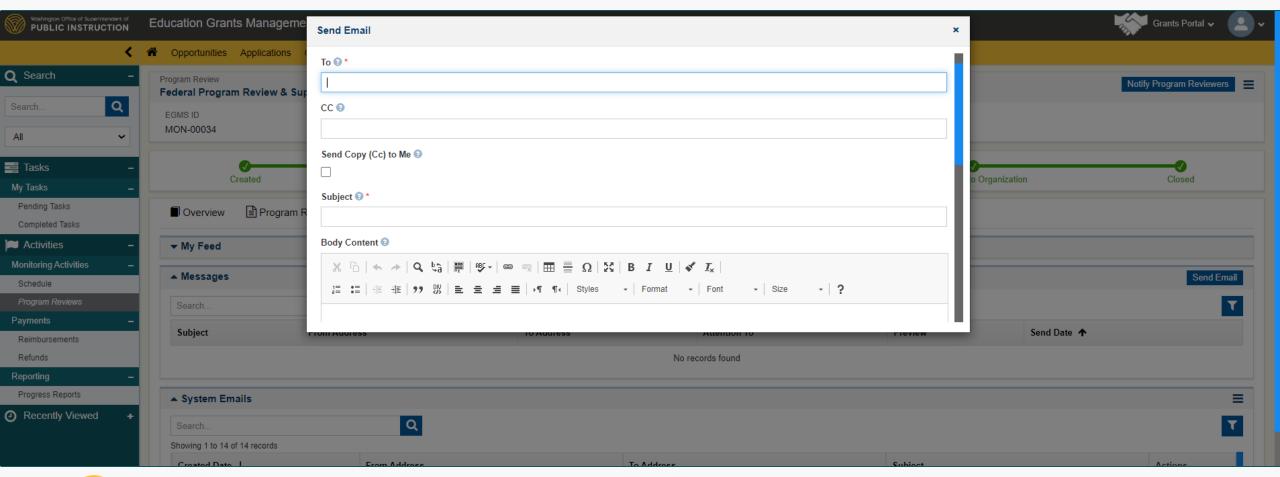
To notify OSPI of implementation evidence submission, you can also send an email through your Program Review.

- Click on the Collab Tab
- In the Messages section, click on Send Email.



The system will generate a pop-up window to compose your email.

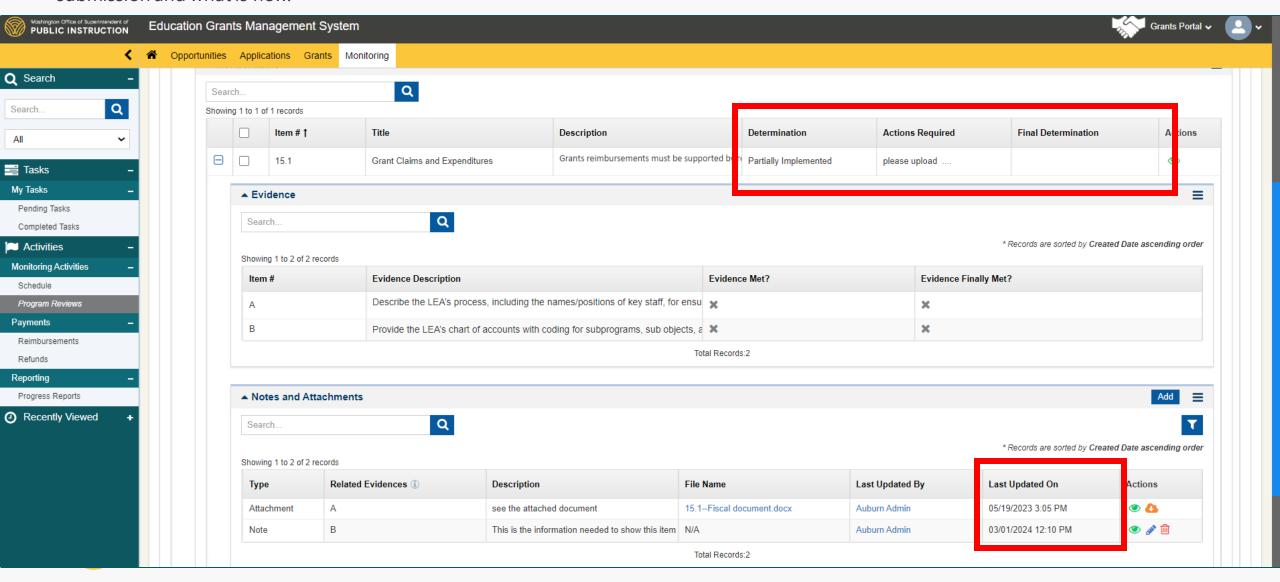
The benefit of sending a Chat or Email is that the system will permanently save them in the Program Review record.



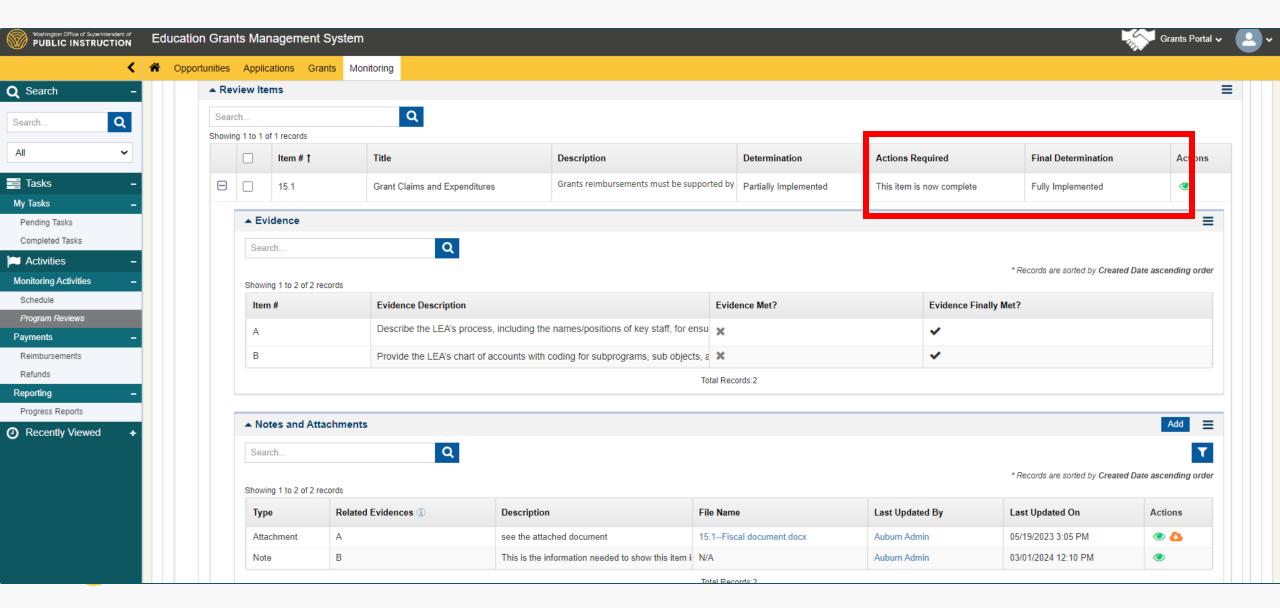


Identifying Approved Items in Follow-up Tab

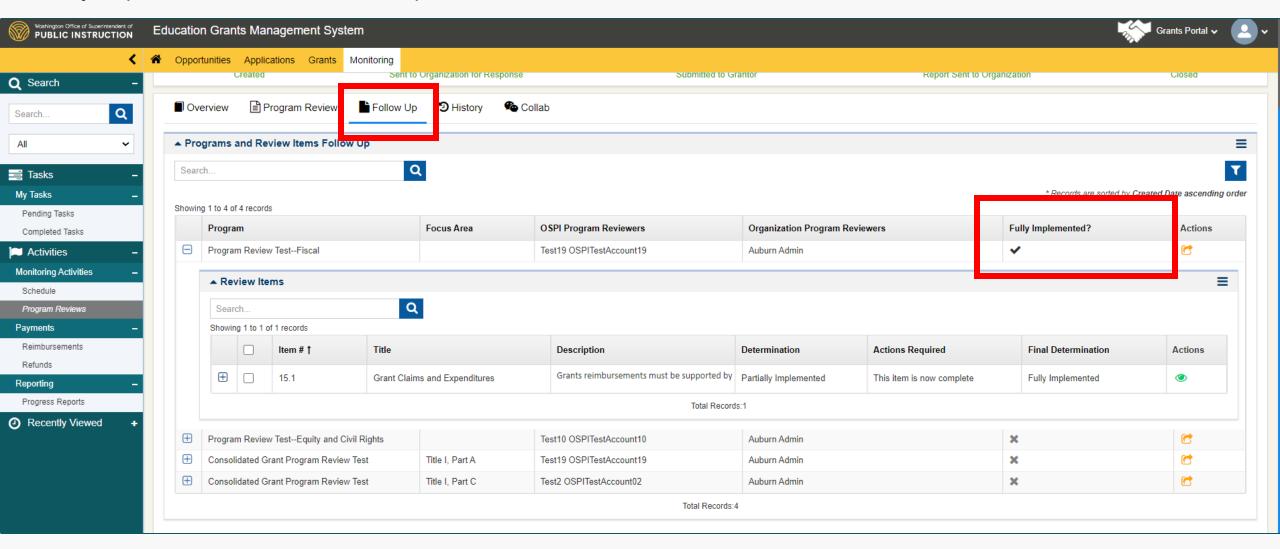
- You will notice that the Program checklist items in the Follow-up Tab have a additional column in the table. They continue to display the previous determination and actions required. There is now a new column for **Final Determinations**.
- You may also notice that all previous notes and attachment submissions are also visible under the applicable items. New submissions will be uploaded in the same Notes and Attachment sections of each applicable item. Use the dates to determine what remains from previous submission and what is new.



When the OSPI Reviewer approves the item, the Final Determination will be added.



When all the items on a Program checklist are fully implemented, the entire Program checklist will be marked Fully Implemented on the Follow-up Tab.

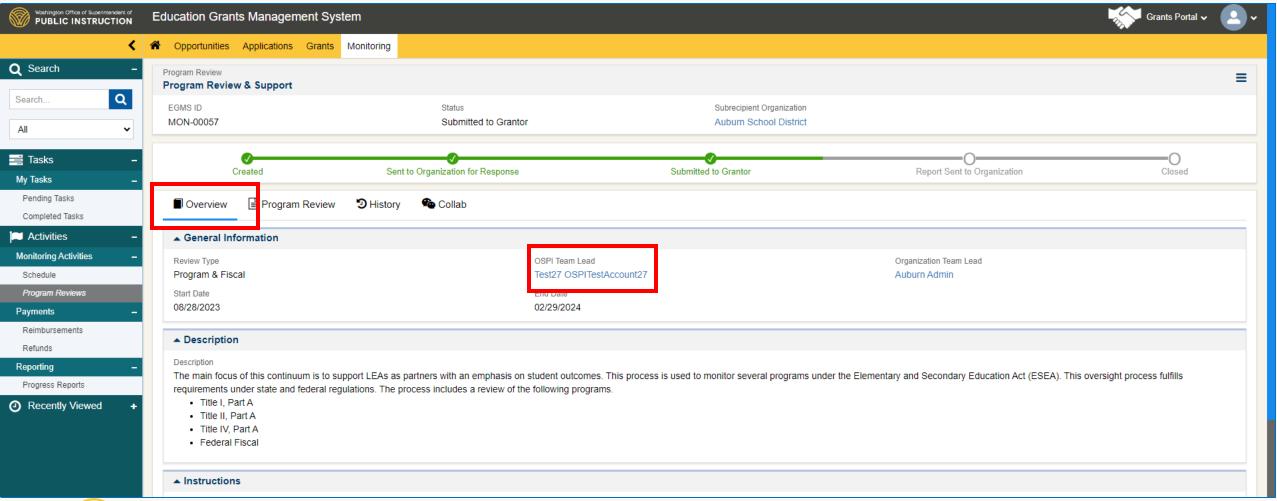




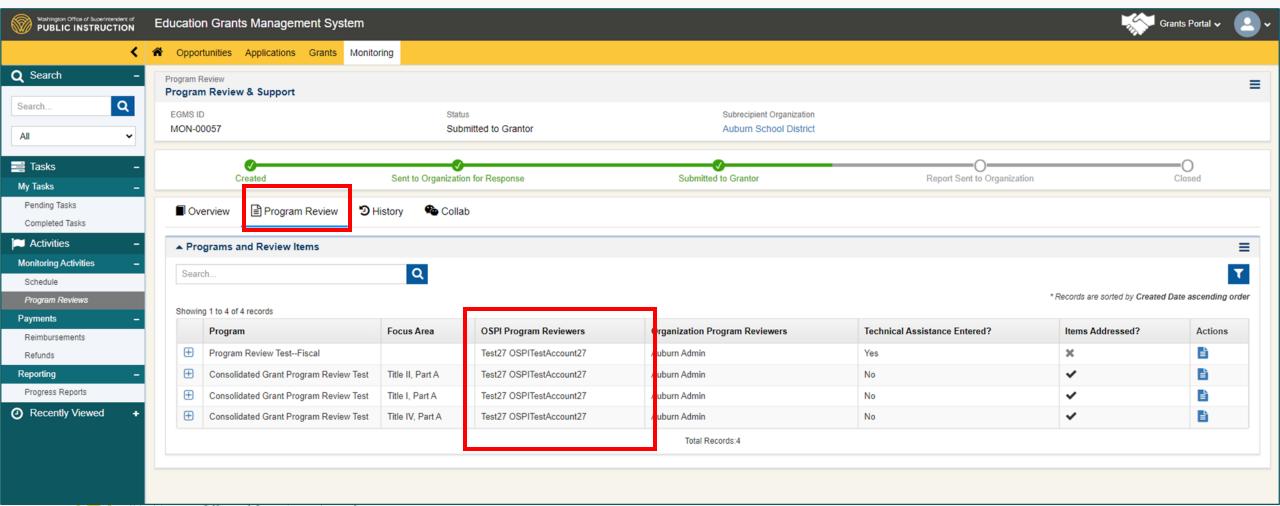
When Additional Assistance is Needed

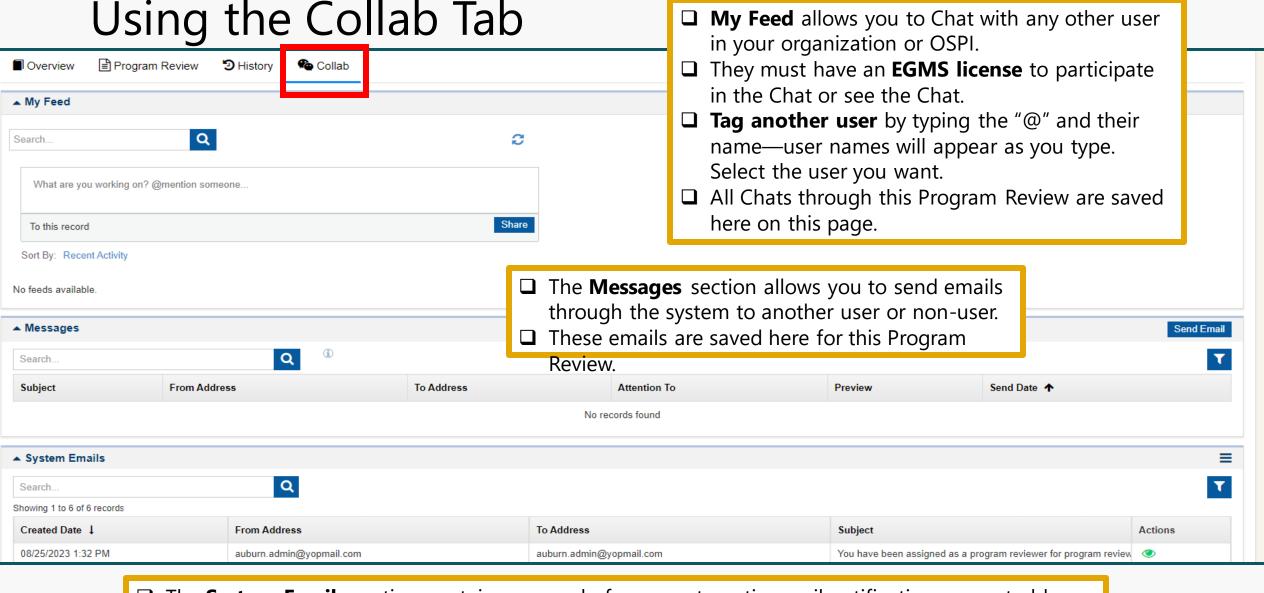
If the LEA has any questions or concerns about the Program Review process or EGMS functionality, reach out to your OSPI Team Lead.

The OSPI Team Leads can be located on the Overview tab demonstrated below.



Any questions or concerns about a Program Review individual item, reach out to the OSPI Program Reviewer assigned to that Program noted under the OSPI Program Reviewers tab.





☐ The **System Emails** section contains a record of every automatic email notification generated by the Organization Team Lead or the OSPI Team Lead.

