

Growth Plan Phases

Phase	Action	User Responsible for Action
Create a Plan	Create a plan by completing a self-assessment, selecting target steps, etc.	Plan creator (teacher or other user)
Waiting for Approval	The plan has been submitted by the creator to the Approver. The Approver has not yet reviewed the plan.	Observer or Administrator with the Approver privilege
Approved	The plan has been approved by an Approver. Action steps may now be updated.	
Returned to Creator	The plan has not been approved by an Approver. Approver may have included comments. Creator may edit plan and resubmit for approval.	
Update a Plan	Update the status of action steps and/or add comments.	Plan creator
Monitor a Plan	View the progress of a plan	Observer or Administrator with the Monitor privilege
Finish a Plan	Plan maybe finished when one of the following is true: <ol style="list-style-type: none"> 1. Learner meets goal(s) 2. Time period for observations included in the plan expires Finished plans are primarily for districts where plans are scored and used in evaluations.	Observer or Administrator with the Evaluator privilege may click Finish Note: If a user achieves their goal(s) prior to the time period expiration, the Evaluator may want to consider NOT immediately finishing the plan as growth may continue.
Completed Plan	A plan is completed when the active time period for the plan has passed.	A plan does not need to be finished or have achieved the set goals to be considered complete. Only the active time period set during configuration needs to have passed.
Archived Plan	A plan that was created prior to August 2012	

A. Start a Plan

Note: Plan steps and requirements will vary by organization. Please contact your Administrator with any specific questions regarding your plan.

1. Click **Growth**.
2. Click **Plans**.
3. Click **Create New Plan**.
4. Complete each step by clicking the corresponding link and following the on screen prompt(s).
Steps may include:
 - a. Self-Assessment
 - b. Selecting a target element(s)
 - c. Identifying action steps
 - d. Submitting the plan for approval

Target Element Definitions

Type of Element	Definition	Notes
Selected	One or more elements that have been configured by the plan creator to be included in the plan. A single growth plan can have multiple selected elements.	
Required	One or more elements that have been selected by the organization as mandatory. These elements <i>must be</i> configured as a part of the plan.	If the organization has not selected required elements, this area will not display on the Select Target Elements page.
Recommended	Elements where the score is below a specified cut point in the element scale. Example: Recommended elements are elements where the score is developing or lower on a scale of innovating to not using.	If no elements are scored that trigger a recommendation, this area will not display on the Select Target Elements page.
Available	Any elements not listed in Selected, Required or Recommended lists. One or more of these elements maybe configured as a part of the plan.	Focus elements are highlighted using an icon next to the available target element. Focus elements are selected by the organization as areas of importance. Focus elements are not required.

For your security, iObservation has a time limit for inactive users. If you are inactive for more than 25 minutes on the target element set up page or the additional questions page, you will be logged out. Every 20 minutes you will be prompted to verify that you want to stay logged in. If you do not confirm within 5 minutes you will be logged out and any unsaved data will be lost. Confirming that you wish to remain active and logged in will not automatically save your work, but will allow you to continue and save without any loss of data.

B. Edit an Unapproved Plan

1. Click **Growth**.
2. Click **Plans**.
3. **Locate** the Plan in the list.
4. *Optional:* You may search, sort and/or filter to find the Plan in the list.
5. Click **Edit**.
5. Update any step by clicking the corresponding link and following the on screen prompt(s).

C. Submit a Plan for Approval

Note: Plan steps and requirements will vary by organization. Some plans may require that all steps are completed prior to submission for approval, while some may not require approval at all. Please contact your Administrator with any specific questions regarding plan requirements.

1. Click **Growth**.
2. Click **Plans**.
3. **Locate** the Plan in the list.
4. *Optional:* You may search, sort and/or filter to find the Plan in the list.
5. Click **Edit**.
6. Click **Submit for Approval**.

D. Approve or Return a Plan

Note: Only a selected user (Observer and Administrator roles only, with the Approver privilege) may approve a plan.

1. Click **Growth**.
2. Click **Plans**.
3. **Locate** the Plan in the list.
4. *Optional:* You may search, sort and/or filter to find the Growth Plan in the list. Growth plans that

are available for approval will say “Awaiting Approval”

5. Click **Review**.
6. *Optional:* Add comments.
7. **Choose** Approve Plan or Return Plan with Comments.
8. *Optional:* Type comments.
9. Click **Save Plan**.

E. Edit a Returned Plan

See **Edit an Unapproved Plan**.

F. Update an Approved Plan

1. Click **Growth**.
2. Click **Plans**.
3. **Locate** the Plan in the list.
4. *Optional:* You may search, sort and/or filter to find the Plan in the list.
5. Click **View**.
6. Updated any steps that have not been ‘locked in’ by the approval process. Example: Update action steps by clicking Start or Finish to indicate progress.

G. Monitor a Plan

Note: Only a selected user (Observer and Administrator roles only, with the Monitor privilege) may monitor a plan. Only plans that have been approved (or activated in cases where approval is not required) maybe monitored.

1. Click **Growth**.
2. Click **Plans**.
3. **Locate** the Plan in the list.
4. *Optional:* You may search, sort and/or filter to find the Plan in the list.
5. Click **View**.

H. Finish a Plan

Note: Only a selected user (Observer and Administrator roles only, with the Evaluator privilege) may finish a plan. Some districts may not utilize the finish feature.

1. Plan maybe **finished** when one of the following is true:
 - a. Learner meets goal(s)
 - b. Time period for observations included in the plan expires

2. Click **Growth**.
3. Click **Plans**.
4. **Locate** the Plan in the list.
5. *Optional:* You may search, sort and/or filter to find the Plan in the list.
6. Click **Finish**.
7. *Optional:* Add comments at the bottom of the plan in the “Overall Comments” area.
8. Click **Finish and Submit Growth Score**.

I. View a Completed Plan

1. Click **Growth**.
2. Click **Completed Plans**.
3. **Locate** the Plan in the list.
4. *Optional:* You may search, sort and/or filter to find the Plan in the list.
5. Click **View**.

J. Delete a Plan

Note: Plans may only be deleted by the creator *prior* to being submitted for approval (if required.) Deleted Plans cannot be recovered. Districts may allow plans to be deleted by selected roles with the delete privilege at other times.

1. Click **Growth**.
2. Click **Plans**.
3. **Locate** the Plan in the list.
4. *Optional:* You may search, sort and/or filter to find the Plan in the list.
5. Click **Delete**.

K. Share a Plan

Note: Sharing is an optional feature in iObservation.

Please see **Share and Collaborate QSG**.

L. Remove Sharing from a Plan

Please see **Share and Collaborate QSG**.

M. View a Shared Plan

Note: Shared plans will have a **Shared** indicator in the list view.

1. Click **Growth**.
2. Click **Plans**.
3. **Locate** the Plan in the list.
4. *Optional:* You may search, sort and/or filter to find the Plan in the list.
5. Click **View**.