Guide to eTemplate Functionality

California Department of Education

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Contents

Introduction to the eTemplate System

The eTemplate is an online system designed to support local educational agencies (LEAs) to include county offices of education (COEs), school districts and charter schools in the development of their Local Control and Accountability Plans (LCAPs). Access to the system is based on an LEA's County/District/School (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 the Word document version.

Note: To improve User experience, please note the following:

Save your work regularly.

Avoid multiple Users accessing the same section at the same time in order to avoid loss of data.

Users will be automatically logged out of the system after three hours.

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 in. The options available on the dashboard will differ depending on the role of the user.

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

Tabs

Beneath the user's name and role are tabs labelled 'LCAPs' and 'My Account'; LEA eTemplate coordinators (coordinators) have an additional tab labeled 'Users'. Selecting a tab allows the user to navigate between the different functions of the eTemplate system.

The 'LCAP' Tab

The 'LCAP' tab displays the following information for each of the LEA(s) to which the user has been assigned:

- LEA name
- CDS Code
- The total number of years the LCAP addresses
- The current LCAP years
- The status of the LCAP (Not Started, Draft, Review, or Complete)

Users may sort the 'LEA', 'CDS', and 'Status' columns using the up and down arrows to the right of the column headings. Users assigned to more than one LEA also have the option to search for an LEA's LCAP using the 'Filter Forms' field.

Following the 'Status' are links to additional information and functionality:

- A link to generate a URL of the current LCAP (indicated by a printer icon)
- A link to begin a new draft of the LCAP (indicated by an addition symbol)
- A link to edit the current draft LCAP (indicated by a pencil icon)
- A link to review the current draft LCAP (indicated by an eye icon)
- A link to additional LEA information and/or functionality (indicated by three dots in a vertical line)

The available links will vary based on the user and the status of the LCAP.

The 'My Account' Tab

The 'My Account' tab displays the following user information:

- First name
- Last name
- Title
- Phone number
- Email address

Users may change this information by entering the changes and selecting the 'Update Account' button.

The tab also provides users the option to change the password for their account. 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 three user roles in the eTemplate. Each role is described below.

Coordinator

A coordinator is responsible for adding or removing LEA users and for communicating information about the eTemplate system to applicable staff at the LEA. LEAs are encouraged to have two or more coordinators. Adding additional coordinators is discussed below.

In addition, a coordinator for a COE will add or remove reviewers for the LEAs within the county; a coordinator for a charter school will add or remove reviewers for that charter school.

Note: Each coordinator account has a unique password; someone who serves as a coordinator for multiple LEAs will have one user name (their email address) but multiple passwords (one for each LEA). To access a different coordinator account, the user must log out of one account and log in to the other.

Adding a Coordinator

To add a new coordinator, select the 'Create a New Coordinator Account' link on the Dashboard and provide the following in the pop-up window:

- First and last name
- Title
- Work phone number and email address
- Type all or part of the LEA name, then select the LEA from the drop-down menu

To add the new coordinator, select 'Submit'; to exit without saving, select the 'Dashboard' link at the top of the web page.

A pop-up window will notify the coordinator that the request was successful or identify any error with the request. If successful, a system-generated email will notify the new coordinator that they have been activated in the system and provide them with a temporary password.

The 'Users' Tab

The 'Users' Tab only displays for coordinators. From the 'Users' tab, a coordinator may add new users, edit a user's personal information, reset a user's password, or delete a user. The 'Users' tab also displays the following information for each user assigned to the LEA:

- Name
- Email address
- Phone number

- LEA name
- Role of the user

To edit a user's personal information, select 'Edit User' (denoted by a pencil icon), make the necessary changes in the 'Edit User' pop-up window, and select either the 'Update User' button (to save the changes) or the 'Cancel' button (to return to the 'Users' tab).

To reset a user's password, select 'Reset User Password' (denoted by an icon of an open padlock). 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. Resetting a user's password will result in a new random password being emailed to the user.

To delete a user, select 'Delete User' (denoted by a 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 New User

A coordinator for a school district may add new submitters for the district; a coordinator for a COE may add new submitters for the COE or new reviewers for the districts in the county; a coordinator for a charter school may add new submitters for the charter school or may add new reviewers for the charter school.

Adding a Submitter

To add a new submitter, select the 'Add New User' button and provide the following within the pop-up window:

- First and last name
- Title
- Work phone number and email address
- Select 'Submitter' as the user role

Select 'Submit' to save or select the 'X' in the top right corner of the pop-up window to exit without saving.

When a user is assigned to a new submitter role, they will receive a system-generated email notifying them of the assignment. If the user is new to the role, they will also be provided with a randomly generated password that they can use to initially log in to the system.

Adding a Reviewer

To add a reviewer, select the 'Add New User' button and provide the following within the pop-up window:

- First and last name
- Title
- Work phone number and email address
- Select 'Reviewer' as the user role and specify the LEA that the user will be reviewing by typing all or part of the LEA name, then selecting the LEA from the drop-down menu

Select 'Submit' to save or select the 'X' in the top right corner of the pop-up window to exit without saving.

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 in to the system.

Submitter

Submitters may 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. A submitter may be assigned to more than one LEA. Upon logging in to the system, a submitter will see all of the LEAs that they are assigned to.

Reviewer

Reviewers are responsible for reviewing a submitted LCAP to determine that it meets the applicable approval criteria. The reviewer role is available only for COEs, charter schools, and the California Department of Education. The reviewer(s) for a school district must be assigned by the district's COE.

- A reviewer may be assigned to review multiple LCAPs.
- Multiple reviewers may be assigned to each LCAP.
- A reviewer may close one LCAP and open another LCAP without logging out of the system.

A charter school assigns its own reviewer. Though not required, it is suggested that the charter school administrator serve as the reviewer/approver for the charter school LCAP.

Unlike coordinator accounts, which must be logged into individually, a single reviewer login will display all of the LEAs that the user is assigned to.

Creating an LCAP

To create a draft LCAP, select the 'Create new LCAP' link (indicated by an addition symbol). The 'Create new LCAP' link (the addition symbol) will change to 'Edit LCAP' (the pencil icon) in subsequent visits to the eTemplate Dashboard.

For those LEAs who finalized their 2019-20 LCAP in the eTemplate system, available information will be prepopulated as appropriate, including the 2019-20 Annual Update.

The LCAP will open to the 'LCAP Template Info' section. At the top of this section are links to the following information:

- Instructions
- LCFF State Priorities
- Instructions for calculating rates for LCFF State Priorities 5 and 6
- A link to the LEA's California School Dashboard

Note: 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). 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 to navigate back to the eTemplate dashboard.

In the 'LCAP Template Info' section, provide the contact information for the LEA's 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

The LCAP Template menu, located on the left-hand side of the screen, allows users to navigate to the different sections of the LCAP. The sections in the LCAP are:

- Print Preview
- LCAP Template Info
- LCFF Budget Overview for Parents (abbreviated as 'Budget Overview for Parents' in the Menu)
- 2019-20 Annual Update with Instructions
- 2020-2023 Plan Summary
- Stakeholder Engagement
- Goals and Actions
- Increased or Improved Services for Foster Youth, English Learners, and Low-income Students
- Expenditure Tables

Select a section to navigate to that section of the LCAP. 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:** To improve User experience, please note the following:
>
> Save you work regularly.
>
> Avoid multiple Users accessing the same section at the same time in order to avoid loss of data.
>
> Users will be automatically logged out of the system after three hours. The timer will reset if the user navigates to another section.

Entering Content into the eTemplate System

In each section of the LCAP, address the specific requirements described in the LCAP template instructions. To access the instructions, click on the blue "i" icon located to the right of the title of the section.

The Budget Overview for Parents, Plan Summary, Stakeholder Engagement, and Increased or Improved Services for Foster Youth, English Learners, and Low–income Students sections contain text fields that allow an LEA to respond to the required prompts.

The Goals and Actions section contains additional functionality and is discussed below.

To comply with federal 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.

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: The eTemplate has an internal timer that will log a user out after three hours of inactivity. The timer will reset if the user navigates to another section (e.g. Annual Update, Unduplicated Pupils, etc.) within the eTemplate during that three-hour window.

If you are working within any section for the three hours, the system will see this as inactivity and log you out, resulting in the loss of any unsaved data.

To prevent this from occurring, please be sure to save each section that you are working on regularly and navigate back to the dashboard or another section when you step away from your desk.

2019–2020 Annual Update

In the first year of using the system, the LEA will need to manually input the goals, expected outcomes, actions and services, and budgeted expenditures from the prior-year LCAP into the 2019-20 Annual Update section of the eTemplate. For this reason, instructions for adding and deleting goals and actions within the 2019-20 Annual Update only apply to an LEA in its first year of using the system.

An LEA that used the eTemplate system to complete the LCAP in the previous year will have prior-year information pre-populated into the 2019-20 Annual Update; the LEA will only be required to provide responses for the actual outcomes, actual actions and expenditures, and the analysis portions of the 2019-20 Annual Update.

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 measurable outcomes, select the 'Add New Outcome' button. To delete an annual measurable 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: To improve User experience, please note the following:

Save your work regularly.

Avoid multiple Users accessing the same section at the same time in order to avoid loss of data.

Users will be automatically logged out of the system after three hours. The timer will reset if the user navigates to another section.

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'. 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.

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 and Actions

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

Note: To improve User experience, please note the following:

Save your work regularly.

Avoid multiple Users accessing the same section at the same time in order to avoid loss of data.

Users will be automatically logged out of the system after three hours. The timer will reset if the user navigates to another section.

Adding or deleting goals

To add a goal, select 'Add 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 text fields to respond to the Goal Description prompt and explanation of development prompt. Complete all available prompts in the Measuring and Reporting Results section.

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

Actions

To add an action to the goal, select the 'Add New Action/Service' button. To delete an action, select the blue 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.

When adding a new action, the user will indicate the action's title, description, and student group(s). The user will be asked to indicate if the action/service is contributing to the Increased/Improved requirements by selecting the 'Yes' or 'No' radial button. The option selected will determine the prompts that need to be answered.

LEAs will input funds as applicable. Data entered in this section will auto populate into the appropriate Expenditure Table.

Goal Analysis

Beginning with the 2021-22 LCAP year, LEAs will respond to the prompts in this section utilizing the instructions to address all requirements.

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.

Expenditure Tables

To export Expenditure Tables, click 'Export Data Table Expenditures', 'Export Total Expenditures', or 'Export Contributing Expenditures'. A .csv file will be generated of the chosen table.

Generating a URL of the LCAP

The eTemplate system will generate a URL of the LCAP.

To generate a URL of the LCAP, select 'Print Preview' located on the LCAP eTemplate Menu.

Users can create a password to protect the document during the draft stage. Once the LCAP has been finalized and posted on the LEA's website, the password should be removed to allow for stakeholder access. To create a password, enter the user-created

password into the 'Current Preview Password' dialogue box. The LCAP is password protected by clicking the 'Password Protected' box. Click 'Update Preview Password' to save the password.

To copy the URL, click 'Copy URL'. Open a new browser and paste the URL into the browser. The system will generate a URL of the LCAP as it currently exists, formatted to the SBE-adopted template.

Submitting an LCAP for Review

An LCAP may be submitted for review once it meets the minimum system requirements for an LCAP. 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.

To submit the LCAP, select 'Submit LCAP' from the LCAP menu to navigate to the 'Submit LCAP for Review' page.

The 'Submit LCAP for Review' page will notify the user that they are about to submit the LCAP for review and that once submitted, the LCAP will be locked for editing. Select the 'Submit for Approval' button to submit the LCAP.

A pop-up window will open asking the user to confirm that they want to submit the LCAP for review. Select 'OK' to submit the LCAP or 'Cancel' to go back to the 'Submit LCAP for Review' page. After selecting 'OK', a second pop-up window will notify the user that the submission was successful. Select 'OK' to be returned to the LEA's eTemplate Dashboard.

After submission, the Dashboard will display 'Review LCAP' (the eye-shaped icon) in place of 'Edit LCAP' (the pencil icon). Coordinators and submitters may select the 'Review LCAP' icon to view the LCAP or may provide or respond to feedback. Information on feedback is provided in the following section.

Upon submission of an LCAP, a system-generated email will be sent to each coordinator and submitter assigned to the LCAP notifying them that the LCAP has been submitted. A system-generated email will also be sent to each reviewer assigned to the LCAP notifying them that the LCAP has been submitted for review.

Review and Approval Functionality

Only users with the role of reviewers may review an LCAP. For information on assigning reviewers, please see the Reviewers section of this document.

After logging in, select 'Review LCAP' (the eye icon) to begin reviewing the LCAP.

Feedback

At the bottom of each section is the feedback portal. Reviewers may use the feedback portal to communicate with the LEA's users. Feedback may be provided multiple times and may be edited or deleted. The feedback portal provides a running record of communication between the reviewer and the LEA while the LCAP is being reviewed.

Provide feedback in the dialogue box; to save, select the 'Save Feedback' button. The feedback will be posted with the name of the user, the date, and will also display options for the user to edit or delete their feedback. A user may not delete feedback provided by another user.

In longer sections of the LCAP, users may access the feedback portal by selecting the 'Leave Comment' button located under the LCAP Menu. Upon selecting the 'Leave Comment' button, the user will be taken to the feedback portal; after posting feedback, the user may select the 'Resume Reviewing' button under the LCAP menu to be returned to where they were in the LCAP.

Within each goal in both the Annual Update and Goals and Actions sections, the 'Leave Comment' button and the 'Resume Reviewing' button are displayed as icons in the top left-hand corner of the goal. The 'Leave Comment' button is displayed as a white speech bubble inside a dark blue square, and the 'Resume Reviewing' button is displayed as an up arrow inside a light blue square.

Approval and Changes Needed

For each section of the LCAP, the reviewer is asked to identify the section or goal as 'Approved' or 'Needs Changes'.

- For school district and county office LCAPs, identifying a section or goal as 'Approved' indicates that it meets the review and approval criteria for the LCAP; identifying a section or goal as 'Changes Needed' indicates that the section or goal does not meet the review and approval criteria.

- For charter school LCAPs, identifying a section or goal as 'Approved' indicates that it was adopted by the charter governing authority; identifying a section or goal as 'Changes Needed' indicates that the section or goal needs additional clarification.

To identify a section or goal as 'Approved', select the green 'Approved' button and confirm by selecting 'OK'. To identify a section or goal as needing additional clarification, select the yellow 'Changes Needed' button and confirm by selecting 'OK'.

Sections identified as 'Approved' will be identified in the LCAP Menu by a checkmark inside a green circle. A goal identified as approved will be indicated by the word 'Complete" inside a green rectangle. A section identified as needing additional clarification will be indicated by an exclamation point inside a yellow circle. A goal

identified as needing additional clarification will be indicated by the words 'Changes Needed' inside a yellow rectangle.

Finalizing the LCAP

Once all the sections of the LCAP have been identified as either 'Approved' or 'Changes Needed', the 'Submit LCAP' link will appear on the LCAP menu. Selecting this link will take the reviewer to the Finalization page.

Returning the LCAP to the LEA

An LCAP with sections or goals with 'Changes Needed' identified may return the LCAP to the LEA by selecting the yellow 'Submit Changes Needed' button and confirming the selection by selecting 'OK'. After selecting 'OK', a second pop-up window will notify the user that the submission was successful. Select 'OK' to be returned to the LEA's eTemplate Dashboard.

A system-generated email will be sent to each coordinator and submitter assigned to the LEA notifying them that the LCAP has been returned. A system-generated email will also be sent to each reviewer assigned to the LEA, notifying them that the LCAP has been returned.

Providing Additional Clarification

An LCAP that has been returned to the LEA for additional clarification will display the sections of the LCAP that have been approved and those in need of additional changes. A section that has been approved is identified in the LCAP Menu by a checkmark inside a green circle; a goal that has been approved is identified by the word 'Complete' inside a green rectangle. A section in need of additional clarification will be identified by an exclamation point inside a yellow circle; a goal in need of additional clarification will be identified by the words 'Changes Needed' inside a yellow rectangle.

Provide additional clarification in the sections or goals of the LCAP identified as in need of additional clarification. After providing the necessary clarifications and selecting 'Save', a dialogue box will open asking the user to identify if the section or goal is ready for review or if the LEA is still working. Select the green 'Ready for Review' button if the section or goal is ready for review; select the yellow 'Still Working' button if the LEA is still working on changes.

Changes may also be made to sections or goals of the LCAP that have been identified as approved. In these sections or goals, users will be asked to respond to the following question: "This section has been approved by the reviewer. Submitting additional changes will require anther review of this section. Would you like to proceed saving your changes?" Selecting 'OK' will save the changes; selecting 'Cancel' will return the user to the section or goal.

Once changes have been made and 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, and the LCAP may be resubmitted as described above in the 'Submitting an LCAP for Review' section.

Reviewing Additional Clarification

When reviewing a returned LCAP, reviewers will see any unchanged sections and/or goals of the LCAP that they previously approved identified by the green circle checkmark. Sections and/or goals that were previously identified as needing changes or that have been changed since being approved will have no indicator.

Reviewers will review the sections or goals without indicators and identify them either as Approved or as Needing Changes, as previously described. Should additional clarification be needed, repeat the process described above.

Approving the LCAP

An LCAP with all of its sections and goals 'Approved' will be able to be identified as 'Complete'. To identify the LCAP as 'Complete', select the green "Approve LCAP" button, then confirm the selection by selecting 'OK'. Note that for charter schools, the green button will read "Submit Adopted LCAP".

Note: Once Approved/Submitted, the LCAP will not be able to be edited!

After selecting 'OK' a second pop-up window will notify the user that the submission was successful. Select 'OK' to be returned to the eTemplate Dashboard.

Upon completion of an LCAP, an email will be sent to all users assigned to the LCAP notifying them that the LCAP has been finalized and completed. The LEA will be able to generate a URL of the approved LCAP for the year.