

Field Trip Process Principal's Offices – How to Guide

Chinook Edge School Division No. 73 Online Field Trip Process



Chinook's Edge School Division 73

March 13, 2019

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Principal & School Administrators How to Guide

Overall Process Flow



Access to Field Trip Forms, Tasks and Documents

Access Online Field Trip Forms

- For Teachers <u>https://records.cesd73.ca/Forms/form/Landing?friendlyname=teachers</u>
- For Principal Office <u>https://records.cesd73.ca/Forms</u>

User Accounts for School

The Principal Office and Shared Teacher Users accounts are specific for each school within the Chinooks Edge School Division

- Shared Teacher Account ---> School Abbreviation-Teachers
- Principal Office Account ----> CESD\School Abbreviation-principaloffice

The Password will be given to the Principal at the School; the Office Administrator will share with the Teachers. **Please note the password cannot be changed.**

Sign In	
Username	
Password	Sign in to CESD
Remember me	olgi in to clob
Sign in	User name
Version 10 Copyright 2012-2017Laserfiche	CESD\Principal Office Login
	Password
	Options
	Windows authentication

Access Field Trip Documents

- <u>https://records.cesd73.ca/laserfiche</u>
- Log into the Repository with the Principal Office account
- The Repository contains all saved documentation from Teachers, Principal and Parents/Guardians for field trips as forms are completed.

Do not use the back arrow \leftarrow in the task pane to maneuver through the field trip form. Use the "previous" and "next" buttons on the bottom of each page on the form.

Passwords cannot be changed.

Field Trip Request Submitted

The Trip Leaders (Teachers) complete and submit the Field Trip Request form online.

Initial Approvals Principal, Superintendent

Field trips are initially approved by the School Principal and then the Superintendent and/or School Board based on the field trip category.

Based on Field Trip Category

Category 1 – Principal only Approval

The application is due at least 2 weeks prior to the trip departure date, the field trip is within Alberta, is 4 Days or less, with a per student cost less than \$500.

Category 2 – Principal and Superintendent Approval

With Principal Approval, the trip is submitted to the Superintendent for approval **at least 2 months prior to the trip departure date**, is within Alberta or in Canada but outside of Alberta, more than 4 days and a per student cost greater than \$500.

Category 3 – Principal and Superintendent Approval (The Board will be informed of approved trips)

Approval from the Principal, submitted to the Superintendent **at least 6 months prior to the trip departure date**. The Field Trip Leader will submit specific documents at least 1 month prior to the departure. International field trips to any location other than the continental United States will not be considered for approval. Kindergarten to Grade 8 school students are not normally eligible to participate in Category 3 trips.

Principal Office Initial Approval

The Principal Office shared mailbox receives an email notification when a new trip is submitted for initial approval. Links within the email opens the field trip request form for review and approval.

The Principal Office initial approval task is also accessible in the forms inbox, My Tasks assigned.

Thu 11/2/2017 3:59 PM cesd-forms-noreply@cesd73.ca Field Trip has been submitted for INITIAL Approval	Inbox Start Process Reports Design Manage Monitor
Field Trip Request for Review Trip Name: Science Center Trip Date(s): 11/8/2017 Submitted by: Tammy Teacher Click link below to view the Field Trip Application submission in a Web browser. After reviewing, you can make your approval decision. Automated Email from Online Field Trip's Forms Chinook's Edge School Division 73	My Tasks Assigned Available Completed Q Search tasks Process name Task name Today (2017-11-02) (1)
<u>Click here to open this task in Forms.</u>	Field Trip Request Principal Approval Science Center - Field Trip Request 8616: La
	Field Trip Request Swimming Lessons - Field Trip Request 8599

Trips without fees: will be sent to parents after principal approval

Trips with fees: will be sent to the Finance Team for fees to be set up. This may take two days. Once the fees are approved and set up, parents will receive an email.

Principal Approval cience Center - Field Trip Request 8	516: Laserfiche Consultant
Field Trip Approval	
Based on the information that the	Field Trip Leader has provided and my judgement that this field trip complies with Id Trip Approval, this field trip is approved with the following conditions:
1 That the Field Trip Leade	r immediately report to the Principal if as they plan the field trip, they have any reason
emergen , and whe changes to the itinerary a 3. That the trip may be can are not being met	re the well-boars, carefuls, parents and stam source of may be in jeopardy i.e. to be reported to the principal as soon as is particularly possible selled, at any time, if in my judgement any of the conditions, listed in point 1 of this letter
Comments	Enter any comments regarding decision here
	Approve Reject

Before approval, the Principal Office can review the field trip request form. The form can be navigated by selecting the Previous and Next button at the bottom of each page. For initial approval, the Principal Office can Approve or Reject the trip request. Comments entered in the comment box will be included in the notification sent to the trip leader. Rejected trip requests are returned to the shared teacher account, where the teacher can **update and resubmit or cancel** the field trip request. Once initial approval is complete, the field trip is setup with fees (if the trip has fees) and the trip folder is created within the schools document repository.

Initial Approval and Fees

Fee Setup in Rycor (Acorn)

The Rycor (Acorn) administrators at Chinook's Edge School Division will setup field trip fees based on the trip information after the Principal and/or Superintendent's initial approval. Once the fees are setup in Rycor (Acorn), the teacher is notified by email and receives a link in the email to the **trip status report** to track completion of consent forms and fee payments.

Field Trip Folder Setup

After the initial approval is complete, a trip folder is created within the school field trip folder in the Laserfiche repository. The Field Trip Request form is saved in the trips folder along with all the Consent and Medical forms completed by parents/guardians. All documents saved can be viewed by the Principal office. See the School View of the Documents Section.

Parent Consent and Medical Forms Process

The Consent and Medical forms are emailed to parents/guardians using **the Guardian email addresses** obtained from PowerSchool. Copies of all emails sent by the field trip process are also sent to the Principal Office Shared Mailbox. The Principal Office can forward emails to Parent/Guardian's or print a paper form if needed. **All Parent/Guardian emails are unique for a specific field trip and student and cannot be shared.**

To Re-Send an individual consent email - please see the section on Re-sending Consent & Medical Forms.

The Teacher will receive emails for students where the Parent/Guardian email address is missing or incorrectly entered, so the school can forward a copy of the unique email to the correct email address.



Wed 3/7/2018 12:43 PM

CESD-Workflow-Noreply@CESD73.ca

Guardian/Parent Missing or Invalid Email Address

• • testdevelopment

Waiting for Trip Date Forms can be updated

Prior to Final Approval, the Principal Office can update the information on the trip form while waiting for the trip date. The number of days a form waits before it proceeds to final approval by Principal/Superintendent is based on the trip category.

The Principal office can add additional classes or individual students to the trip, however, if additional students are added, only parents of students added will receive consent emails with any updated information on the form. Once Final Approval has been given the trip information cannot be changed.

NOTE: when the field trip form is updated:

- Current Parents/Guardians do not receive an updated email with changes
- Only specific Information is sent in the parent consent form about the trip
- All other field trips are updated and saved on the form document within the repository

Trip information included in Parent Consent and Medical Forms:

- Trip Name
- Trip Date
- Due Date (for consent forms)
- Parent Letter
- Hazard List
- High Risk Activity.

Start Process Monitor Inbox Reports Design Manage My Tasks Assigned Available Completed **Q** Search tasks Ŧ Task name T Process name Waiting for Trip - can update Field Trip . Field Trip Request Science Center - Field Trip Request 8616: La.. Yesterday (1) **Review Field Trip - Final Approval** Field Trip Request Swimming Lessons - Field Trip Request 8599..

Field Trip Request	Review Field Trip - Final Approval
Held Hip Kequest	Swimming Lessons - Field Trip Request 8599

Final Trip Approval

The Final Field Trip Approval is based on the trip category as outlined below

Field Trip Category	Days before trip – Final Approval sent to
Category 1	2 days before trip Final Approval is sent to the Principal Office
Category 2 & 3	30 days before trip Final Approval is sent to the Superintendent Office

Once the Principal Office has completed final approval the following actions occur

- 1. Field Trip Request document saved in the repository
- 2. Field Trip Itinerary document generated and saved in the repository
- 3. Field Trip Student list document is generated and saved into the repository
- 4. Checks to see if any students have been added to the trip and emails the guardian
- 5. Send the Trip Leader an email with a link to compete the field trip form after trip has finished.

Once final approval has been given, the field trip form cannot be updated.

Final approval does not need to be given prior to a trip.

2. That the Fie undersigned emergency changes to 3. That the trip are not bein	Id Trip Leader does not make ar d. This conditions does not inclu situation where the well-being of the itinerary are to be reported to o may be cancelled, at any time, u met	changes to the Itinerary without th e responses to situations the Field students, parents and staff well-bei the principal as soon as is particula in my judgement any of the conditi	e prior consent of Trip Leader consic ng may be in jeopa arly possible ions, listed in point
Field Trip De	cision		
Select Field Trip	Approve Trip	T	
Previous	Approve Trip Postpone Trip CANCEL Trip		
Comments			
		Enter any com regarding decis	iments ion here
		Submit	

Field Trip Decision

While the trip is waiting for the departure date, the Principal Office can Cancel or Postpone the field trip by updating the Field Trip Decision and selecting Submit.

Postponed Trips

To postpone a field trip, select the Field Trip Decision "Postpone Trip" from the dropdown list. Enter comments or reason for the trip postponement in the Comments section, then click the Submit button.

The Trip Leader (Teacher) receives an email regarding a trip postponement including any comments made by the principal office and the request to prepare the appropriate communication to parents.

The Field Trip Request is assigned back to the Principal Office as "Postponed Trip Waiting for Final Approval". This task will wait indefinitely until a decision is made to Proceed with the trip or CANCEL the TRIP. Proceed: will proceed with the trip.

Tue 11/7/2017 10:21 AM CESD-Forms-noreply@cesd73.ca Field Trip Swimming Lessons has been Postponed	Postponed Trip Waiting for Final Approval Science Center - Field Trip Request 8616: Laserfiche Consultant Assigned to: Laserfiche Consultant Date assigned: 10:34 / 1. That the expenence will provide educational benefit to the students in alignment to the curriculum and more an of studies 3. That the trip may be cancelled, at any time, if in my judgement any of the conditions, are not being met	AM hent with listed in p
Tammy Teacher The field trip Swimming Lessons has been Postponed by Principal's Office with the following comment Bad Weather Please prepare appropriate communications to Parents/Guardians. Field Trip Details 11/2/2017 Red Cross Training Center Automated Email from Online Field Trip's Forms Chinook's Edge School Division 73	Field Trip Decision Select Field Trip Postpone Trip Decision* Bad Weather Reason* Bad Weather Comments Enter any comments regarding decision here Comments Proceed CANCEL TRIP)

Cancelled Trips

For Cancelled trips, the field trip request form is saved to the repository under completed trips with the trip status set to Cancelled.

The Trip Leader (Teacher) will receive an email regarding the cancelled trip including any comments made by the principal office and a request to prepare the appropriate communication to parents.

C To O testdevel	Tue 11/7/2017 10:25 AM CESD-Forms-noreply@cesd73.ca Field Trip Swimming Lessons has been Cancelled opment	^			
Tammy Teac	ther				
The field trip	Swimming Lessons has been Cancelled by Principal's Office with the following comment				
Please prepa	Please prepare appropriate communications to Parents/Guardians.				
Field Trip De 11/2/2017	tails				
Red Cross Tr	aining Center				
Automated I Chinook's Ea	Email from Online Field Trip's Forms Ige School Division 73				

Trip Complete

The teacher receives an email reminder with the **link to complete the field trip completion form** and upload any documents for Medical Logs and or Incident(s) that occurred during the field trip. **It is important for teachers to complete this task.**



Shared Principal Office Mailbox

Each school Principal and Administrator will be a delegate of a Shared Principal Office Mailbox. To access the shared mailbox from their current CESD mailbox follow these steps.

How to Access Shared Principal Office Mailbox as a Delegate

- 1. Log into your Google Mail account
- 2. Click your account photo or circle with your initial in the upper-right corner of page
- 3. From the drop-down menu, select the desired delegated account. A new window or tab will open displaying the delegated account.



Special Groups – School Teams; Extracurricular Activities

Special groups can be created within PowerSchool under the Course Field Trip Forms.

The following information is required when creating a special group

- 1. Section Expression, when the group meets
- 2. Section Number, an alpha-numeric short description for the group
- 3. Students are added to this custom group within PowerSchool.

Note: PowerSchool data is updated in the Field Trip forms once a day after 10:00 p. m. Custom Groups created in PowerSchool will not be displayed in the Field Trip Forms dropdown list until the following day.

School View of Trip Documents

Access Field Trip Documents

- <u>https://records.cesd73.ca/laserfiche</u>
- Log into the Repository with the Principal Office Field Trip account
- The Repository contains all the saved documentation from the Teacher, Principal and Parents/Guardians for field trips as they are completed.

Secure School Document Repository

Each school within the school division has access to an individual secure document repository. To access the field trip documents

Search repository

Name

• Log into the Laserfiche Repository

1 entry

Laserfiche[®]

CESD > Schools

CESD

> 🛅 CESD Records

> 🗋 Schools

• Click Schools then select your school folder.

	Sign in to CESD
on	User name
	CESD\Principal Office Login
	Password
	••••••••••••••••••••••••••••••••••••••
	Options
	Windows authentication
Q	Stay signed in

The School Field Trips folder contains three subfolders

- 1. **Pending** trips with initial approval pending completion of setup
- 2. Approved trips approved and the setup has been complete, waiting for trip completion
- 3. **Completed** trips completed
 - a. No Incidents with no Health and Safety incidents during trip

TESTING - Alberta High School

b. With Incidents – with Health and Safety incidents during trip

Laserfiche	▼ Search repository	Q	
CESD > Schools > _TEST	ING - Alberta High School 🔹 Field Tr	ips > 2017 2018 3 entr	
	Name I Pending 2 Approved	C 2017 2018 Metadata F	
> 🗅 Schools	3 Completed	Template STING - Alberta Tags	Search repository Q Adva High School > Field Trips > 2017 2018 > 3 Completed Name
			No Incidents With Incidents
		 Field Trips 2017 2018 	
			10

🛅 Schools 🕁

Fields

No templat

Pr

Metadata

Template

Tags

Laserfiche	✓ Search repository O	Advance
_TESTING - Alberta High Scho	ol 🗸 > Field Trips > 2017 2018 > 2 Approved 2 e	entries
CESD CESD Records	Name 2017-11-02 Swimming Lessons 2017-11-08 Science Center	C 2 Meta
> 🖻 Schools		Temi

Each Field Trip folder contains the following documents and folders

- 1. Field Trip Request form
- 2. As trips progress through the approval process
 - a. Complete Student Medical Package
 - b. Field trip Student list
 - c. Field Trip Itinerary
- 3. Folders for each student.



Within each student folder, the completed parent/guardian consent and medical form is saved. A copy of the medical form only is saved separately to be included within the Field Trip Medical Package generated by Teachers from the Field Trip Status form. The Student folder has the Metadata tracking history of when the consent email was sent to parent/guardian.

Field Trip Naming Conversion

Trip Type	Naming Convention	
	Field Trip Names have a maximum length of 50 characters Field Trip Names can contain the following: Alpha-numeric and Spaces. Spaces count as part of the 50 characters.	Please refer to the What's New Release V2 brochure as the Field Trip Naming has been simplified. Trip names are now entered such as
	DO NOT USE slashes (/ \) or Periods(.), Commas (,), Hyphens (-) or Underscores (_) in the field trip name	"Ski Trip", "Swimming Lessons". There is no need to enter all info.

Manual Consent & Medical Form Process

There may be occasions when a parent/guardian may need to submit a paper copy of the consent and medical form

- 1. Print the parent consent form for the specific field trip from the Shared Principal office mailbox
- 2. Once the parent has completed and signed the document, scan the document
- 3. Log into the CESD repository using the Principal Office account
- 4. Navigate to the field trip folder and find the student's folder
- 5. Open the student's folder and drag and drop the signed scanned consented form into the folder
- 6. Within the Import document dialog box
 - a. Click the Fields tab and select "Manual Field Trip Consent Form" from the template dropdown
 - b. Click the Import button
- 7. (Manual) Student Medial and Consent form is saved within the student folder.

Femplate			
Manual Field Trip Concent Form			
manual rick rup consent rorm	•		
Employee information Sheet Form Employee Information Sheet Form Encountents Example - Consent Form Template Expense Calima Field Trip Field Trip Field Trip Finance Template Forms			
General Template	_TESTING - Alberta High School - > Field	I Trips → 2017 2018 → 2 Approved → 2017-11-08 Science Ce	nter > Tables, Bobby - 100110
ID Security Card Request Template	✓ ➡ Schools	Ø Name	(Manual) Student Medical and Consent Form
Issues & Concerns	> 🛅 _School0	🛞 험 (Manual) Student Medical and Consent Forms	
	Schoolt		Metadata Fields Preview Processes Recor
Journal Entry Template			
Journal Entry Template LAPP Monthly Remittance Learning Services Contracts	TESTING - Alberta High School		Template
Journal Entry Template LAPP Monthly Remittance Legal	TESTING - Alberta High School		Manual Field Trip Consent Form
Journal Entry Template LAPP Monthly Remittance Learning Services Contracts Legal Local Authorities Pension Plan (LAPP) Manual Field Tato Consent Form	Construction C		Template Manual Field Trip Consent Form Structert ID

Resending Consent & Medical Form Process

There may be occasions when a parent/guardian cannot find the original email containing the unique link to the consent and medical forms.

To Resend the trip consent and Medical form, email the Principal office, if a copy of this email is not in the Shared Principal Office mailbox

- 1. Navigate to the student folder for the specified field trip
- 2. Click on the student folder to view the associated Metadata fields
- 3. Select **Resend** from the dropdown list for *ceftEmailSent*
- 4. Click on Save to update metadata for student's folder.

Name	Creation date	E Smith Jana 100101 🛧	
🛛 🗖 Doe, John - 100100	2018-01-02 9:37 AM		
🛯 🛅 Ninja, Jill - 100201	2018-01-02 9:37 AM	Metadata Fields Preview Processes Records	
🛛 🛅 Samurai, Jack - 100200	2018-01-02 9:37 AM	ceftStudentID	123431
🛛 🛅 Smith, Jane - 100101	2018-01-02 9:37 AM	100101	
Cross-Country Skiing KCountry	2018-01-02 9:37 AM	ceftStudentABID	ceftEmailSent
Cross-Country Skiing KCountry - Medical Package	2018-01-02 9:44 AM	123451	Resend
Cross-Country Skiing KCountry - Student List	2018-01-02 9:44 AM	ceftEmailSent	No
Cross-Country Skiing KCountry - Trip Itinerary	2018-01-02 9:38 AM	Yes	Yes Docord
		ceftHistory	Resella
		1/2/2018 9:38 AM Guardian email sent to fieldtriptesting@cesd73.c	~~

- b.
- The *ceftHistory* is updated with the date, time and address the email was sent to.

Metadata	Fields	Preview	Processes	Record
ceftStudent	ABID			
123451				
ceftEmailSer	nt			
Yes				
ceftHistory				
1/2/2018 9: fieldtriptest	38 AM Gua ting@cesd	ardian email 73.ca.	sent to	
1/3/2018 12	2:44 PM Gi	uardian Emai	il resent to	╞
fieldtriptes	ing@cesd	73.ca.		

Updating Student Wait List Status

- 1. Navigate to the student folder for the specified field trip
- 2. Click on the student folder to view the associated Metadata fields
- 3. Select the dropdown list for On Waiting List and change the status from YES to NO
- 4. Click on the Save Button to save the changes
- 5. The Teacher status report will display YES for this student's status and their medial forms will be included in the Trip Package generated by the teacher on the Field Trip Status page.

✓ Search repository Q Adv	anced
> _TESTING - Alberta High School > 2 Approved > 2018-01-03 Cr	oss-Country Skiing KCountry 8 entries (1
Name	Smith Jane - 100101 🛠
🔲 🛅 Doe, John - 100100	
🗐 🛅 Ninja, Jill - 100201	Metadata Fields Preview Process
🔲 🛅 Samurai, Jack - 100200	
🗷 🛅 Smith, Jane - 100101	ceftStudentPaid
Cross-Country Skiing KCountry	
Cross-Country Skiing KCountry - Medical Package	On Waiting List?
Cross-Country Skiing KCountry - Student List	Yes Yes
Cross-Country Skiing KCountry - Trip Itinerary	No
	Save Cancel

Name	Fees Paid	and the second se	Forms Received
Doe, John		Will Update to Yes	Yes
Ninja, Jill			
Samurai, J <mark>a</mark> ck			Yes
Smith, Jane			W/L