



Pathway: **Main Menu > Action Items > My Action Items**

A Student Services Full user with the appropriate security access can create **Action Items** for him/herself, or for others.

Action Type	Date Assign...	Date Due	Date Closed	Student Id	Student Name	Status

Any existing action items will display on this screen, and will be filtered depending on which radio button is selected: **Assigned to me** or **Requested by me**.

To update an existing Action item, select it on this screen and click **View/Modify**

The Status drop down menu contains the values; **All items**; **Outstanding items**; or **Complete**. Action items can also be filtered by Status.

To add a new Action item click **Request**. Action Items can also be created during the **Review Process** by clicking on the Action Items tab.

When **Request** is clicked on the screen above, or from **Main Menu > Action Items > Submit Action Items** the **Action items details** screen below displays:

Adjudication Processes

- Annual IEP Review
- Behaviour Plan
- Call
- Complete a Review
- Consultation/Assessment
- Consultation/Assessment Cancellation
- Contact Physician
- Emergency/Site Safety Plans
- Follow up
- Interministerial Semiannual Behavioural Review
- Liaise with outside agency
- Obtain Parental/Guardian Permission
- Other
- Personal Care Plan
- Provide Assessment Report
- Review & Consult
- Risk assessment
- Safety Plan
- Schedule Meeting
- Send Letter
- Transportation Plan
- eMail/Other Electronic Communication

COMPLETED
IN PROGRESS
NOT STARTED
WITHDRAWN

Action items details

Requested By: DFREETHY

Action Type: [?] Status: NOT STARTED

Date Assigned: 13-MAY-2008 Due Date: 20-MAY-2008 +

Pupil Number: [?] [?]

Submit Action Item to:

[?] [?] [?] [?]

Add Del

Details [?]

Submit Spell [?] [?] [?]

A user may assign **Action items** to any member of staff by clicking the **Add** button and then clicking the **?** button which will enable the user to choose from the staff list. Once the action information has been added to the **Details** box (use text editor to the right of the box for ease of use) and the user has checked the accuracy of the information (remember the **Spell** button is not active) the item can be added to the staff member's **Action Items** by clicking **Submit**.