



# Using Action Plans in PIDS Webinar Handout

**Required User Role: Data Collector, Classroom Coach Data Collector, or Leadership Coach**

## Location in PIDS: Program Leadership Team Dashboard

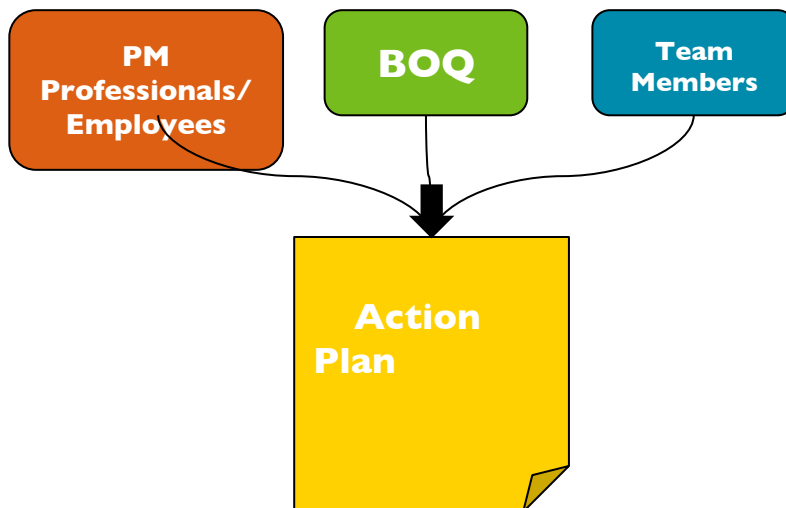
4 Sections:

- **Action Plan**
- Action Plan Meeting Schedule
- Leadership Team Members
- \*Program Address

## Order of Operations: Information Used in Action Plan

Information described below includes data that should be entered prior to creating the Action Plan. Entering this information first, is the best order of operations ensuring the user does not have to backtrack to other sections in PIDS to create a complete Action Plan.

1. Pyramid Model Professionals/Employees
2. Benchmarks of Quality
3. Leadership Team Members





Home Page → Benchmarks of Quality 2.0 Forms Dashboard → Add New BoQ

- Benchmarks of Quality (flows into Action Plan)
  - The information collected in the BoQ automatically displays in the Action Plan, allowing the team the ability to focus action steps around critical elements not in place, partially in place, emerging
  - The most current BoQ will be displayed in the Action Plan
  - BoQs older than **6 months** (from the start date of the Action Plan) will NOT display in the Action Plan. If the BoQ is that old, best practice would be to complete a new BoQ.

**BOQ 2.0 Dashboard**

Benchmarks of Quality 2.0 Forms Upload Rosters + Add New BOQ

All Benchmarks of Quality 2.0 Forms  
This table contains all Benchmarks of Quality 2.0 forms regardless of when they were performed.

Enter text to search... Search

| Form Date  | Program Name        | Program Location | Team Members                    | Actions |
|------------|---------------------|------------------|---------------------------------|---------|
| 05/01/2023 | Alice in Wonderland | Oxfordshire      | Jane and sue and john           | Actions |
| 04/25/2023 | Alice in Wonderland | Oxfordshire      | Summer and Melanie              | Actions |
| 04/21/2022 | Alice in Wonderland | Oxfordshire      | Aaron, Sammy, Beth              | Actions |
| 05/05/2021 | Alice in Wonderland | Oxfordshire      | Aaron, Beth, Peter, Mike, Sammy | Actions |
| 06/01/2020 | Alice in Wonderland | Oxfordshire      | Sammy, Alice, Jane, Brad, Adam. | Actions |

Home Page → Pyramid Model Professionals Dashboard → Add New Professional

- Pyramid Model Professionals (Flows into Action Plan)
  - Information regarding active, hired, and resigned employees will display automatically in the Action Plan

**Pyramid Model Professional Dashboard**

Pyramid Model Professionals Upload Rosters + Add New Professional

All Professionals  
This table contains all professionals, regardless of their employment status.

Enter text to search... Search

| ID        | Name         | Job Function(s)                                  | Hire Date  | Separation Date | Program             | Actions |
|-----------|--------------|--|------------|-----------------|---------------------|---------|
| 2222333   | Cheshire Cat | Teaching Assistant, Classroom Coach              | 02/02/2011 |                 | Alice in Wonderland | Actions |
| 77777     | Queen Hearts | Teacher, Data Collector                          | 04/01/2010 |                 | Alice in Wonderland | Actions |
| 9898      | White Rabbit | Teacher, Classroom Coach                         | 03/01/2010 |                 | Alice in Wonderland | Actions |
| SID-10210 | Miss Violet  | Teacher  | 02/02/2020 |                 | Alice in Wonderland | Actions |
| SID-10218 | Andy Jones   | Teacher, TPOT Reliable Observer, Classroom Coach | 05/05/2021 |                 | Alice in Wonderland | Actions |



Home → Program Leadership Team Dashboard → Add New Member

- Leadership Team Members (Flow into Action Plan)
  - Team member information will display in the Action Plan including, name, start date, end date, email address.

The screenshot shows the 'Program Leadership Team' section of the dashboard. A yellow arrow points to the '+ Add New Member' button. Below this, there is a table of 'All Program Leadership Team Members' with columns for ID, First Name, Last Name, Start Date, Email Address, Leave Date, and Program. The table contains four rows of member data.

| ID     | First Name | Last Name | Start Date | Email Address         | Leave Date | Program             | Actions |
|--------|------------|-----------|------------|-----------------------|------------|---------------------|---------|
| 32156  | Fancis     | Larney    | 06/01/2018 | francis@fakeemail.com |            | Alice in Wonderland | Actions |
| 951321 | Sam        | Adams     | 01/01/2019 | sam@fakeemail.com     |            | Alice in Wonderland | Actions |
| 987456 | Becky      | Henderson | 02/01/2019 | becky@fakeemail.com   |            | Alice in Wonderland | Actions |
| SID-57 | Pepper     | Potts     | 04/21/2023 | pepper@fakeemail.com  |            | Alice in Wonderland | Actions |

Once all external components have been completed (steps above), the Action Plan is ready to complete. Completing the steps above creates a smooth workflow for the end user, however the Action Plan can be completed without the above components entered. This would create an incomplete action plan draft. If it is not possible to complete the Action Plan from start to finish in the order described above, that is okay. However, it is important to know how the information gets in the Action Plan.

Other data collection components of the Program Leadership Team Dashboard:

Home → Program Leadership Team Dashboard → Add New Schedule

- Action Plan Schedule
  - The months in a given year the team has scheduled meetings to discuss, review, or create the Action Plan
  - This information does not display or flow into the Action Plan

The screenshot shows the 'Action Plan Schedule' section of the dashboard. A yellow arrow points to the '+ Add New Schedule' button. Below this, there is a calendar-style table showing scheduled meetings for the years 2022 and 2023, with columns for months (Jan-Dec) and 'Actions'.

| Program             | Year | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Actions |
|---------------------|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|---------|
| Alice in Wonderland | 2023 | x   | ✓   | x   | x   | x   | ✓   | x   | ✓   | x   | ✓   | x   | ✓   | Actions |
| Alice in Wonderland | 2022 | ✓   | x   | ✓   | x   | ✓   | x   | ✓   | x   | ✓   | x   | ✓   | x   | Actions |



## Starting a New Action Plan

## Updating an Action Plan

+Add New Action Plan

+Prefill New Action Plan

Home

ASQ:SE Screenings

Other Social Emotional Assessments

Behavior Incident Reports

Benchmarks Of Quality 2.0 Forms

Children

Classrooms

Classroom Coaching Logs

Pyramid Model Professionals

Program Leadership Team

TPITOS Observations

### Program Leadership Team Dashboard

Action Plans

Help + Add Action Plan

+ Add New Blank Action Plan

+ Prefill New Action Plan

All Action Plans

This table contains all Action Plans regardless of their start date.

Any action plans that were pre-filled and are not fully reviewed will be highlighted in yellow.

Enter text to search... Search

| Start Date | End Date   | Fully Reviewed | Program Name        | Program Start Date | Cohort   | Leadership Coach (username) | Actions |
|------------|------------|----------------|---------------------|--------------------|----------|-----------------------------|---------|
| 06/07/2023 | 07/31/2023 | ✓              | Alice in Wonderland | 03/22/2009         | Cohort A | Summer Edwards (sedwards)   | Actions |
| 01/01/2020 | 12/31/2020 | ✓              | Alice in Wonderland | 03/22/2009         | Cohort A | Summer Edwards (sedwards)   | Actions |

There are two options available when starting an Action Plan. The first is to create a new plan from a blank form. A blank form means there are no Action Plan specific details in the form. Information from external sections of PIDS such as the BoQ or schedules, will display in this new blank version.

The second option is intended to be used to revise, renew, update the Action Plan year to year. This option allows the user to copy forward the content from the most recent Action Plan into a new one for the next year. This feature is designed to save time re-writing planning details from year to year. When a plan is copied from the previous plan, the system will require the user to review each section of content in the plan and confirm the information is correct and current.

### Edit Action Plan

Because this action plan was pre-filled from a previous action plan, several sections must be reviewed. Once all sections are reviewed and the action plan is saved, this warning and the review indicators will disappear.

Basic Information (Section 1) Save and Download/Print

Because this section was pre-filled from a previous action plan, you need to review it and confirm it is correct. Once you have fully reviewed this section and made any necessary modifications, please check the box below.

This section is complete and accurate.

Program: Alice in Wonderland

Program Launch Date: 03/22/2009

Program Cohort: Cohort A

Action Plan Start Date: 06/07/2023

Action Plan End Date: 07/31/2023

Is Leadership Coach Involved: Yes

Primary Leadership Coach: Summer Edwards

Primary Leadership Coach Email: summerjedwards@outlook.com

Mission Statement

Additional Notes/Comments

## Creating a New Action Plan (Blank)

### Section I. Basic Information



## Add New Action Plan

[Save and Download/Print](#)

**Basic Information (Section 1)**

|  |  |                              |
|--|--|------------------------------|
| <p><b>Program</b></p> <div style="border: 1px solid #ccc; padding: 2px;">--Select--</div> <p><small>Program is required!</small></p>   | <p><b>Program Launch Date</b></p>  | <p><b>Program Cohort</b></p> |
| <p><b>Action Plan Start Date</b></p> <div style="border: 1px solid #ccc; padding: 2px;">--Select--</div> <p><small>Action Plan Start Date is required!</small></p>             | <p><b>Action Plan End Date</b></p> <div style="border: 1px solid #ccc; padding: 2px;">--Select--</div> <p><small>Action Plan End Date is required!</small></p> |                              |
| <p><b>Is Leadership Coach Involved</b></p> <div style="border: 1px solid #ccc; padding: 2px;">--Select--</div> <p><small>Is Leadership Coach Involved is required!</small></p> |  |                              |
| <p><b>Mission Statement</b></p> <div style="border: 1px solid #ccc; height: 40px;"></div> <p><small>Mission Statement is required!</small></p>                                 | <p><b>Additional Notes/Comments</b></p> <div style="border: 1px solid #ccc; height: 40px;"></div>  |                              |

The Basic Info section includes Program Name, Start Date, End Date, Leadership Coach information, Mission Statement and Additional Notes. The fields highlighted in red are required to be completed in order to save and move on to the next section.

|   |  |
|---|--|
| <p><b>Is Leadership Coach Involved</b></p> <div style="border: 1px solid #ccc; padding: 2px;">Yes</div> | <p><b>Primary Leadership Coach</b></p> <div style="border: 1px solid #ccc; padding: 2px;">--Select--</div> <p><a href="#">Help</a></p> |
|---|--|

If the Leadership Coach Involved question is answered 'Yes', the user will be presented with another box to select the Leadership Coach. If the dropdown is blank, there is no one assigned to the program in PIDS with a Leadership Coach Role.



Click the Save button when the section is complete to move on to the rest of the form.

**Validation Errors!** If you encounter a validation error upon saving these are the likely issues to be corrected:

4. The Action Plan dates are greater than one year
5. The Action Plan dates overlap a previous Action Plan already entered
6. A required field is missing information
7. You've indicated 'Yes' a Leadership Coach is involved but did not select the name in the 'Primary Leadership Coach' field.

## Section 2. Active Leadership Team Members



Active Leadership Team Members (Section 2)

This section is automatically filled based on the Program and action plan timeframe in the Basic Information section.

All active Leadership Team members from the Program Leadership Team dashboard

Enter text to search...

| Team Member              | Start Date | Email Address         | Leave Date | Program             |
|--------------------------|------------|-----------------------|------------|---------------------|
| (32156) Francis Lanney   | 06/01/2018 | francis@fakeemail.com |            | Alice in Wonderland |
| (951321) Sam Adams       | 01/01/2019 | sam@fakeemail.com     |            | Alice in Wonderland |
| (987456) Becky Henderson | 02/01/2019 | becky@fakeemail.com   |            | Alice in Wonderland |
| (SID-57) Pepper Potts    | 04/21/2023 | pepper@fakeemail.com  |            | Alice in Wonderland |

Previous 1 Next

The Active Leadership Team Members section is a display only section. This information is pre-populated by PIDS from the Leadership Team Member Section in the dashboard.

### Section 3. All Meeting Dates

This section of the Action Plan is to document all team meeting dates that have been scheduled. These can be Leadership Team Meeting dates or other dates the team wishes to document. To add a new meeting, click '+Add New Meeting Date' and enter date, leadership coach attendance (Yes, No) and enter a note about the meeting. Click Save when done to move on to the next meeting you wish to add or to continue on to the next section.

All Meeting Dates (Section 3) + Add New Meeting Date

This section should be used to record all the Program Leadership Team meeting dates.

All meeting dates for the action plan timeframe

Enter text to search...

| Meeting Date               | Leadership Coach Attendance? | Notes |
|----------------------------|------------------------------|-------|
| No data available in table |                              |       |

Previous Next

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**Add Meeting**

Meeting Date: 06/19/2023

Leadership Coach Attendance?: Yes

Notes: We discussed scheduling PD for the 2024 -2025 school year. Training events planned include PBC, TPOT, and Implicit Bias.

### Section 4. Meeting Dates Proposed by Leadership Coaches



Meeting Dates Proposed by Leadership Coaches (Section 4)

**i** This meeting date section is automatically filled based on the Program and action plan timeframe in the Basic Information section. The only Leadership Coach schedules that will appear below will be for the selected Program and selected action plan timeframe.

All meeting dates from the Leadership Coach dashboard

Enter text to search...

| Program             | Year | Leadership Coach          | Total Meetings | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---------------------|------|---------------------------|----------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Alice in Wonderland | 2024 | Summer Edwards (sedwards) | 3              | x   | x   | x   | ✓   | x   | x   | ✓   | x   | x   | ✓   | x   | x   |

Previous 1 Next

Section 4 is a display only section. Information entered in this section is pre-populated by PIDS as entered into the system by the Leadership Coach (with Leadership Coach role). Information in this section will display for the corresponding Action Plan year (determined by dates in the Basic Info section).

## Section 5. Meeting Ground Rules

Meeting Ground Rules (Max: 6) (Section 5) + Add New Ground Rule

**i** Each ground rule should be entered individually with a unique Rule Number.

All meeting ground rules for the action plan timeframe

Enter text to search...

| Rule Number                | Rule Description |
|----------------------------|------------------|
| No data available in table |                  |

Previous Next

Add Ground Rule

Rule Number:

Rule Description:

Cancel Save

If the team chooses to do so, they may enter meeting ground rules into their Action Plan. To enter a rule click the '+Add New Ground Rule' button, enter a rule number, and description of the rule. Click Save when complete to enter another rule or to continue on to the next section in the plan.

## Section 6. Program Staff Information

Program Staff Information (Section 6)

**i** This section is automatically filled based on the Program and action plan timeframe in the Basic Information section.

Total Number of Active Staff In PIDS  
7

Number of Staff Hired  
0

Number of Staff Terminated  
0

Section 6 is display only and is pre-populated by PIDS from the Pyramid Model Professionals section.

## Section 7. Benchmarks of Quality



Benchmark of Quality Information (Section 7)

This section is automatically filled based on the Program and timeframe in the Basic Information section. It pulls the most recent Benchmark of Quality form for the program that is on or before the action plan end date and on or after the action plan start date minus six months. The table below displays all the indicators that are either Not In Place or Partially In Place.

Critical Elements

ELT = Establish Leadership Team   SBI = Staff Buy-in   FE = Family Engagement   PWE = Program-Wide Expectations   PDSSP = Professional Development and Staff Support Plan  
 PRCB = Procedures for Responding to Challenging Behavior   MIO = Monitoring Implementation and Outcomes

Most Recent BOQ Date

05/01/2023

Indicators from the Most Recent BOQ that can be Improved

| Critical Element | Indicator Number | Benchmark of Quality   | Indicator Status   |
|------------------|------------------|--|--------------------|
| ELT              | 1                | Team has broad representation that includes at a minimum a teacher, administrator, a member who will provide coaching to teachers, a member with expertise in behavior support and a family member. Other team members might include a teaching assistant, related service specialists, a community member, and other program personnel. | Partially In Place |
| ELT              | 3                | Team has regular meetings. Team meetings are scheduled at least 1x per month for a minimum of 1 hour. Team member attendance is consistent.  | Partially In Place |
| ELT              | 4                | Team has established a clear mission/purpose. The team purpose or mission statement is written. Team members are able to clearly communicate the purpose of the leadership team.   | Not In Place       |

Section 7 will display the most current Benchmarks of Quality, highlighting the critical elements that are not in place yet. Critical elements that are partially in place are highlighted in yellow and not in place are red. BoQs will only display here if they are within 6 months of the Action Plan start date, or completed within the Action Plan date range. Example:

- Action Plan START Date: 01/01/2022
- Action Plan END Date: 12/31/2022
- The BOQ will be included if the BOQ date is between 07/01/2021 and 12/31/2022.

## Section 8. Action Steps

Benchmark of Quality Action Steps (Section 8) + Add New Action Step

Each time the status of an Action Step changes, edit the Action Step and add a new status record in the Action Step Status section. After pre-fill, make sure that the target dates are between the start and end dates of the Action Plan.

All action steps for the action plan timeframe

| Critical Element | Indicator | What is the Problem/Issue/Task to be Addressed?  | Action Step/Activity   | Persons Responsible | Target Date | Current Action Step Status |         |
|------------------|-----------|--|--|---------------------|-------------|----------------------------|---------|
| ELT              | 5         | Discipline policy does not include information about Pyramid Model or about ways we prevent expulsions and suspensions | Develop policy statement which includes universal practices, expectations and a team based approach including family members for addressing behavior that challenges | Whole team          | 02/01/2022  | Completed                  | Actions |
| PDSSP            | 23        | We do not have a behavior specialist at the program  | Jo will attend PTR-YC in December  | Jo                  | 12/15/2021  | Completed                  | Actions |

Previous 1 Next





**Add Action Step**

|   |  |   |
|---|--|---|
| <p>Indicator</p> <input type="text" value="(ELT) 3"/> | <p>Critical Element</p> <p>Establish Leadership Team</p> | <p>Indicator Description</p> <p>Team has regular meetings. Team meetings are scheduled at least 1x per month for a minimum of 1 hour. Team member attendance is consistent.</p> |
|---|--|---|

|  |  |
|--|--|
| <p>What is the Problem/Issue/Task to be Addressed?</p> <div style="border: 1px solid #ccc; height: 40px; margin-bottom: 5px;"></div> <p style="font-size: 8px; color: red;">● What is the Problem/Issue/Task to be Addressed? is required!</p> | <p>Action Step/Activity</p> <div style="border: 1px solid #ccc; height: 40px; margin-bottom: 5px;"></div> <p style="font-size: 8px; color: red;">● Action Step/Activity is required!</p> |
| <p>Persons Responsible</p> <div style="border: 1px solid #ccc; height: 40px; margin-bottom: 5px;"></div> <p style="font-size: 8px; color: red;">● Persons Responsible is required!</p>   | <p>Target Date</p> <input type="text" value="--Select--"/> <p style="font-size: 8px; color: red;">● Target Date is required!</p>   |
| <p>Current Status</p> <input type="text" value="--Select--"/>  | <p>Current Status Date</p> <input type="text" value="--Select--"/>   |

Section 8 is where the Action Steps are developed. To add a new Action Step, click ‘+Add New Action Step’. Selecting the Critical Element Indicator, will populate the details about that critical element for the team to refer to. Note the Target Date must fall within the Start and End date recorded in the Basic Information section at the top of the Action Plan (Section 1).

\*Action Step Status - Action Steps can be updated throughout the course of the Action Plan period. To document a change in the Action Step, click on the Actions Button and click Edit. This will open the Action Step up for edits including the status. Add a new status by clicking +Add New Action Step Status. Each status change should be a new status row with a new date.

**Validation Errors! If you encounter a validation error upon saving these are the likely issues to be corrected:**

1. The Action Step dates are greater than one year
2. The Action Step dates are outside of the Action Plan start and end dates
3. A required field is missing information
4. You’ve indicated ‘Yes’ a Leadership Coach is involved but did not select the name in the ‘Primary Leadership Coach’ field.

### Other Notes About Action Plans:

- Action Plans are also available at the Community (Hub) and State levels in PIDS. These plans function the same way as they connect to their corresponding Benchmarks of Quality.
- Action Plans may only be created for a single year time frame.
- Action Plans are designed to be worked on and modified throughout the course of a year or designated time period.



- Action Steps are designed to be dynamic and be updated as the team reviews progress and assesses the step's status.
- State Action Plans, within the SLT Dashboard, have an additional space to create workgroups as designated by the team. Action Plans may then be workgroup specific.