

# ACCUTRACK SUCCESS PLANS SCREEN

When you click on Success Plans from the main System Administration Menu, you will see the following options:

- **Student Plans:** Use to view and complete **Student Success Plans** for a selected student.
- **Action Items:** Use to create **Action Types** and the **Action Items** that are grouped under an **Action Package**. After creating **Action Types** and **Action Items** you can create an **Action Package** and assign any of them to it.
- **Bulk Assignment:** Use to assign **Action Items** or **Action Packages** to individual **Students** or all members of a **Student Group**.

## STUDENT PLANS

**Purpose:** View and complete **Action Items** for a **Student**.  
**Access:** From **System Administration**, click on **Success Plans > Student Plans**.

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Close

Student Plans

Student

Alvarez, Laura [555555555]

Show completed

Action Type	Mnemonic	Action Item	Assigned	Due	Complete	Completed
New Student	NEW-01	Visit Financial Aid	11/08/2019 1	11/22/2019 1	<input checked="" type="checkbox"/>	11/08/2019 1
New Student	NEW-02	Visit Registrar	03/12/2020 0	12/31/2019 0	<input checked="" type="checkbox"/>	12/13/2019 0
Student Orientation	LIB	Visit the Library	03/12/2020 0	05/31/2020 0	<input type="checkbox"/>	
Student Orientation	SSL	Visit the Student Success Labs	03/12/2020 0	05/31/2020 0	<input type="checkbox"/>	

Action Type

Student Orientation

Action Item

Visit the Library

Mnemonic

LIB

Default Duration

168

Date Assigned

03/12/2020 09:44 AM

Date Due

05/31/2020 09:44 AM

Assigned By

Super User

Assignment Notes

☐ Completed

Date Completed


Completed By

Completion Notes

Add New Assignment(s)

Complete Assignment

Remove Assignment

**Student:** Click the  button to select a student. If the student has any action items assigned, they will appear in the display grid. Click on an item in the grid to view the details for that item.

**Show completed:** After selecting a student, check this box to show completed **Action Items** only or leave it unchecked to view both completed and non-completed items.

**Action Details:** After you select an **Action Item** for a **Student** from the top grid, the center portion of the screen will show the details on the selected item.

**Note:** Learn more about using Success Plans from our blog at:  
<http://accuideas.blogspot.com/2014/09/student-success-plans.html>

## Add New Assignment(s)

Then use the **Add New Assignment(s)** button to add a new **Action Item** or **Action Package** for the selected **Student**.

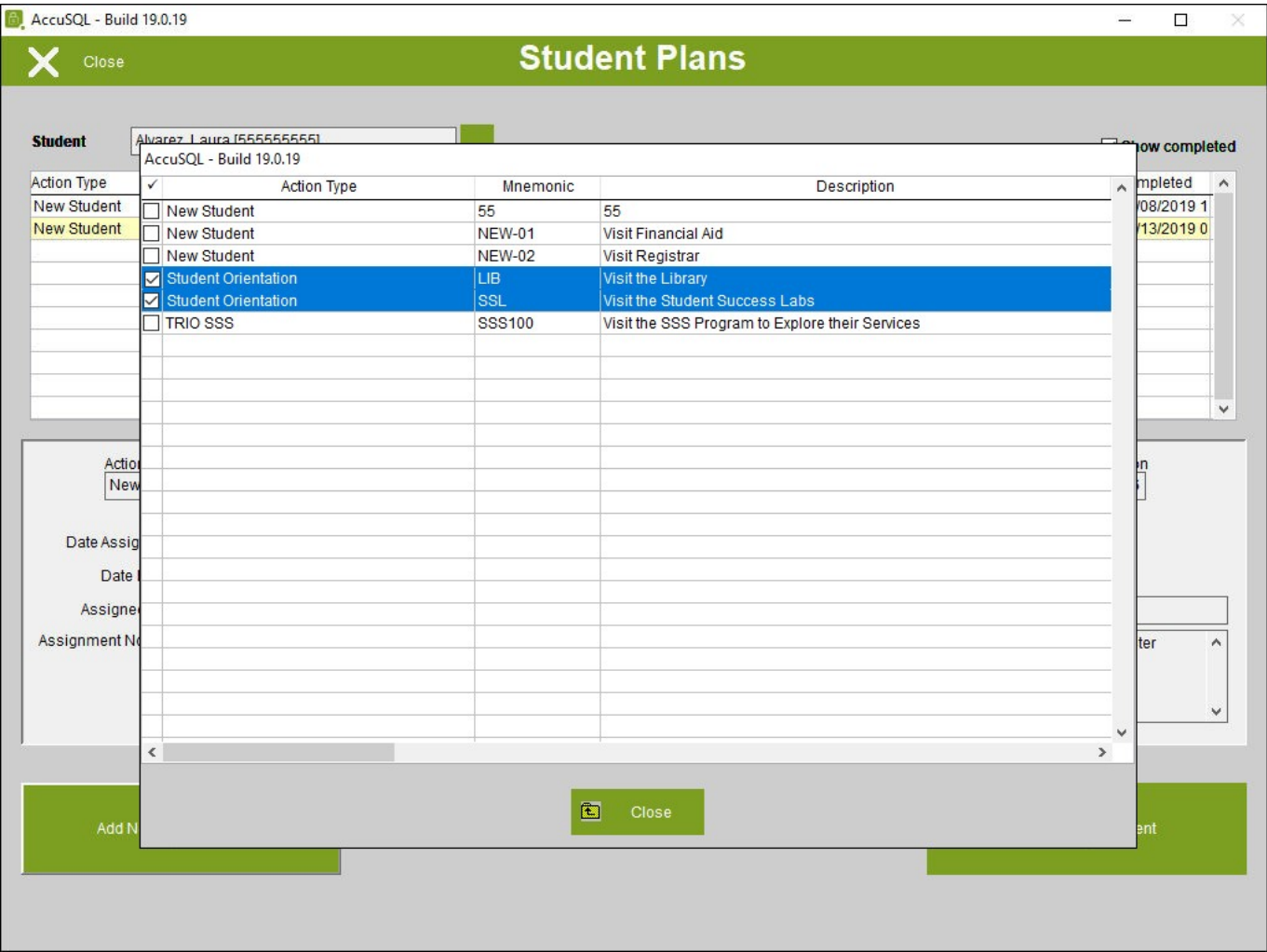
The screenshot displays the 'Student Plans' interface in AccuSQL. A modal window titled 'Assign Action Items to Laura Alvarez' is active. Inside this window, there are radio buttons for 'Action Items' (selected) and 'Action Package'. A 'Select' button is next to these options. Below is a table for 'Selected Action Items' with columns: Action Type, Mnemonic, and Description. At the bottom of the modal, there are input fields for 'Date Assigned', 'Date Due' (set to 'Thu, Mar 12, 2020, 09:55 AM'), 'Assigned By', and a text area for 'Assignment Notes'. 'Assign' and 'Cancel' buttons are at the very bottom of the modal. In the background, the main form shows the student's name, a 'Show completed' checkbox, and a list of assignments with columns for 'Date Completed' and 'Duration'.

**Action Items:** If you would like to add a single Action item for the student, click this radio button. Action Items are created in the Success Plans » Action Items screen and then assigning them here.

**Action Package:** If you would like to add a group of actions for the student, click this radio button. Action Packages are created in the Success Plans » Action Items screen by first creating the Action Types and Action Items, creating an Action Package from the items, and then assigning them here.

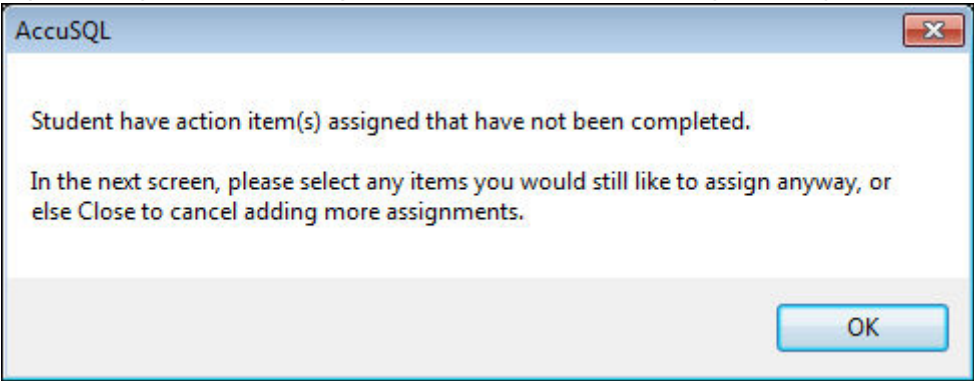
**Select:** After you have selected either the **Action Items** or **Action Package** radio button, click the Select button to add the item or package for the student. A screen will appear where you can select

the action items you would like to add:



Select the desired **Action Items** and then click the **Close** button at the bottom. Back on the **Assign Action Items** screen, add any notes for the **Action Items** and then click the **Assign** button.

**NOTE:** If you have the same **Action Item** assigned to a student already and it is not marked as complete, when you assign the item(s), you will receive the following message:



Then in the **Select Action Items** picklist, you can select the items you would like to duplicate. Or if you do not select any items and simply click the **Close** button this would avoid adding any duplicate **Action Items**.

**Understanding fields and options displayed**

**Date Assigned:** Automatically generated.

**Due Date:** This field will be populated with the Duration you entered when you created the Action Item initially. You can change the date and/or time the item is due to overriding the default due date.

**Assigned By:** This field will automatically be populated with the currently logged in **AccuSQL** or **AccuTrack** user who is creating the assignment.

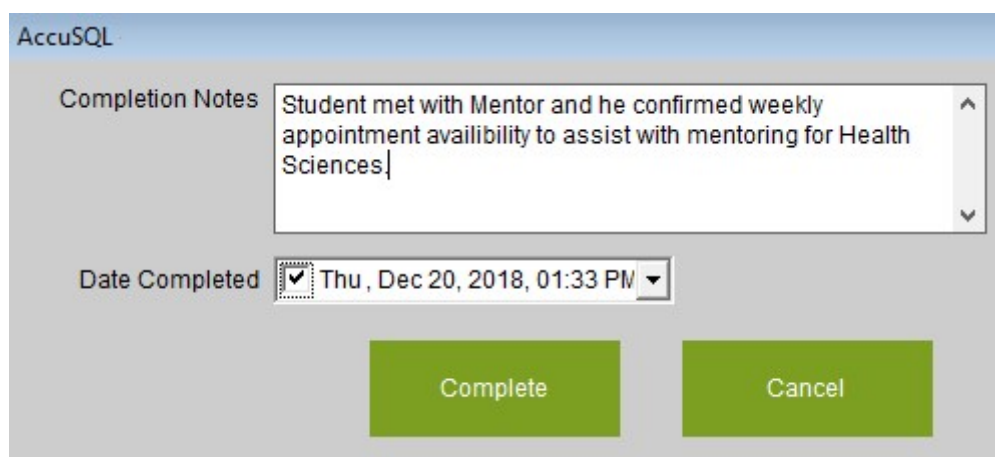
**Assignment Notes:** Enter any notes you would like to include for the assignment.

**Assign:** Click this button to assign the item to the student. It will then be added to the Student Plan you have selected.

**Cancel:** Cancels current operation and returns you back to the main Student Plans screen.

## Complete Assignment

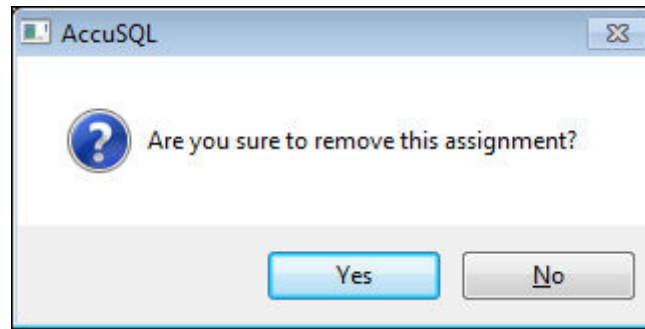
After you have selected a **Student** in the main **Student Plans** screen, any incomplete assignments will not have the Completed checkbox shown in the display grid at the top. Click on one of those assignments in the list and then a **Complete Assignment** button will become available at the bottom of the screen. Click the **Complete Assignment** button and you will be presented with a screen where you can enter any completion notes.



Enter your notes, if desired, and then click the **Complete** button. The screen will close at that time and you will be returned to the **Student Plans** screen with that item marked as complete in the top grid. Click on the **Action Item** again to view the details for it if it is not already selected.

## Remove Assignment

If you wish to completely remove an assignment item for the student, select it from the grid at the top of the screen and then click the **Remove Assignment** button. You will then get a confirmation box. Click **Yes** to remove or **No** to cancel the operation.



## ACTION ITEMS

**Purpose:** To create the action types and action items you will be assigning to the students' success plans.

**Access:** From **System Administration**, click on **Success Plans > Action Items**.

First, you will need to click **Add** on the left to add an **Action Type**. All **Action Items** are grouped under a top-level **Action Type**. After you create the **Action Type**, then you can select it and click **Add** button on the bottom right of the screen to add the individual **Action Items** that will appear under the selected **Action Type**:

**Action Items**

Mnemonic	Description	Duration (hours)
NEW-01	Visit Financial Aid	168
NEW-02	Visit Registrar	336
NEW-03	Visit Career Counseling	1512

### Action Types

Description
New Student
Student Orientation
TRIO SSS

Description

New Student

Add Delete Edit

Create Action Package

Mnemonic

Description

Duration  ☒ Hours ☐ Days ☐ Weeks

Notes

Add Delete Edit

**Mnemonic:** Enter a short code for the action item.

**Description:** Enter the description for the action item.

**Duration:** First select the hours, days, or weeks radio button, then enter a number based on that value. This is when the action item is due after the date/time it is assigned to the student.

**Note:** After saving, the number will convert to hours automatically. This is the expected action and is how the application stores the time value.

**Notes:** Add any notes to elaborate on the action item. These are internal and will not appear on the Action Plan report.

**Save:** After you have created the action item click Save to save your work. You can continue adding items for the selected Action Type using this method.

## Creating an Action Package from Action Items

After you have finished adding the various **Action Types** and **Action Items** that appear under them, you can create an **Action Package**. You can assign the **Action Package** to the **Student** and all **Action Items** that are included will be assigned to the **Student** at once if you so choose.

To create the **Action Package**, click the **Create Action Package(s)** button. Now click the **Add** button and create a description. If desired enter the completion duration for the overall package and click the **Save** button.

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Close

Action Items

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Close

Action Packages

Desc  
New  
Stud  
TRIO

Description

Duration (hours)

At Risk	672
New Student	672
Orientation	672

Description

New Student

Duration

672

Hours

Days

Weeks

Add

Delete

Edit

Action Type

Mnemonic

Description

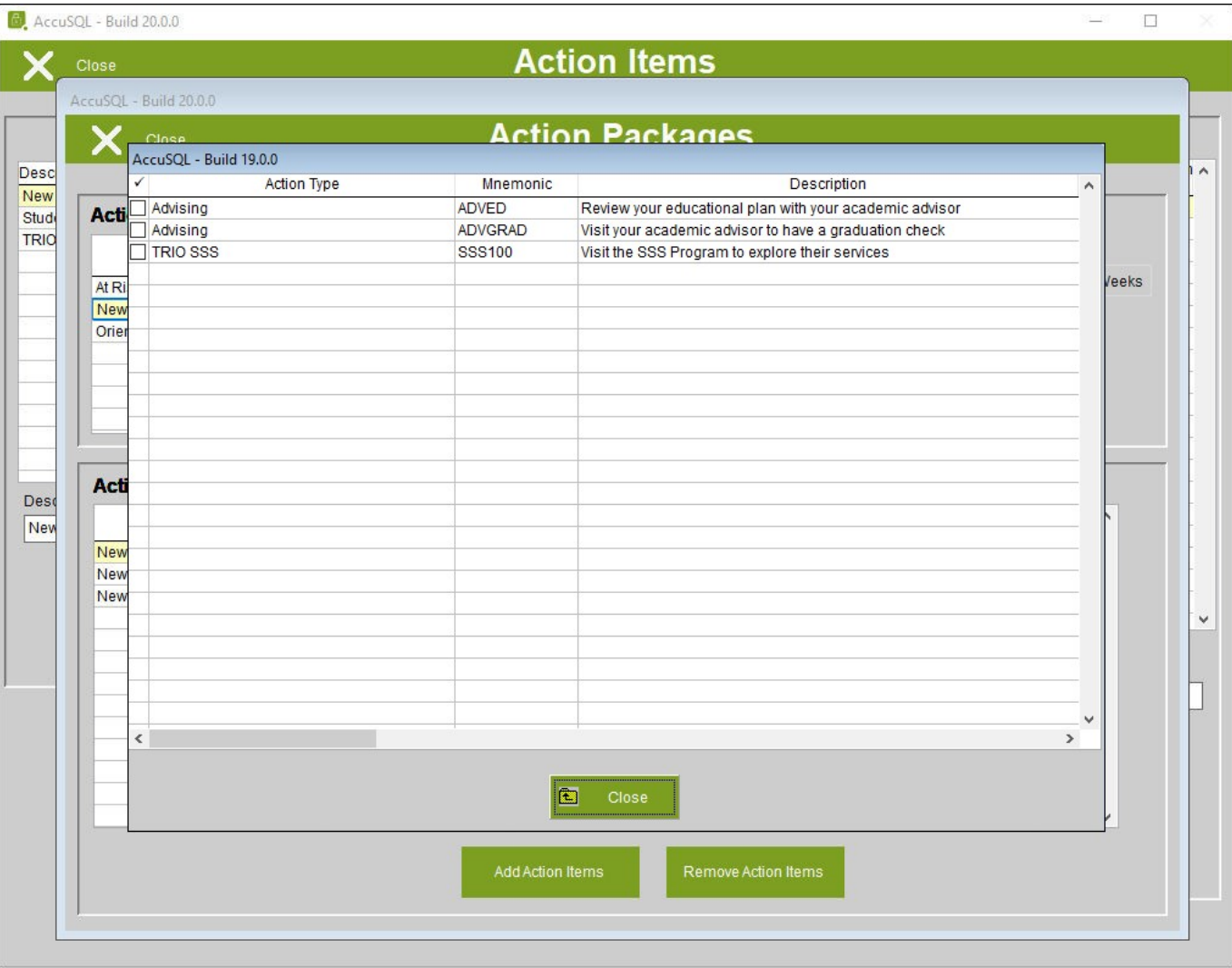
Duration (hours)

New Student	NEW-01	Visit Financial Aid	168
New Student	NEW-02	Visit Registrar	336
New Student	NEW-03	Visit Career Counseling	1512

Add Action Items

Remove Action Items

Now click the **Add Action Items** button at the bottom. All of your action items will appear grouped by **Action Type**. Click the checkboxes next to the items you would like to include in the package and then click the **Close** button.



You will be returned to the **Action Packages** with the **Action Items** assigned to the package. You can now click the **Close** button to complete this process.

**Note:** In the **Success Plans > Student Plans** screen, after you select the student, you can click Add new Assignment(s) and then select the **Action Packages** radio to select an action package to assign to the student versus adding and individual item.



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Close Student Plans

Student Alvarez, Laura (5555555555) Show completed

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Action Package

At Risk

OK

Add New Assignment(s)

Remove Assignment

## BULK ASSIGNMENT

**Purpose:** Assign an **Action Item** or **Action Package** to several **Students** at once using either a pick list of **Students** or **Student Group** list.

**Access:** From **System Administration**, click on **Success Plans > Bulk Assignment**.

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X

Close

Bulk Assign Action Items

Select students using:

☐ Students list

☒ Student Groups

Select

Selected Students

First Name	Last Name	Id
Bob	Aash	995451111
Aaron	Aasher	000224411
Angeneque Clayton	Acevedo-bauerfeind	581723436
Laura	Alvarez	555555555
Nick	Armstrong	666666666
Cetin	Basoz	222222222
Chadd	Blodgett	333333333
James	Dean	888888888
Roxanne Michael	Farias	825474060
David	Foster	444444444
Diego	Jancic	777777777
Mike	Nash	999999999

Select Action Item(s) using:

☐ Action Items

☒ Action Package

Select

Selected Action Items

Action Type	Mnemonic	Description
TRIO SSS	SSS100	Visit the SSS Program to Explore their Services

Date Assigned

03/12/2020 03:13 PM

Wed, Apr 15, 2020, 03:13 PM

Assigned By

Super User

Assignment Notes

Assign

If you want to assign items via a pick list of **Students**, the **Student list** radio button should be pre-selected, but click it if not and a list of the students will appear in a picklist. Select the checkbox next to each **Student** to whom you want to **Assign Items/Action Packages**, and then click the **Close** button.

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Close

Bulk Assign Action Items

Select students using:

Students list

Student Groups

Select

Selected Students

First Name	Last

Select Action Item(s) using:

Action Items

Action Package

Select

Selected Action Items

Action Type	Mnemonic
TRIO SSS	SSS100

Date Assigned

03/12/2020 03:13 PM

Date Due

Wed, Apr 15, 2020, 03:13 PM

Assignment Notes

Assign

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	FNAME	LASTNAME	ID
<input type="checkbox"/>	Pieter N	Allred	242644045
<input type="checkbox"/>	Ashlee L	Almada	593078560
<input type="checkbox"/>	Eileen Lee	Alonso	666270221
<input type="checkbox"/>	Hamilton Lynn	Alonso	202152322
<input checked="" type="checkbox"/>	Laurie Kay	Alonso	571449126
<input type="checkbox"/>	Emoree Ann	Alrobiai	422657347
<input type="checkbox"/>	Shaylee P.	Alsip	400282244
<input type="checkbox"/>	Gena Rebecca	Alsup	686496200
<input type="checkbox"/>	Mary Beth	Alsup	867435074
<input type="checkbox"/>	Moses Annette	Alsup	194256757
<input type="checkbox"/>	Rosemary	Alsup	594239197
<input type="checkbox"/>	Terrell Arun	Alsup	526247357
<input type="checkbox"/>	Cornelio M	Altizio	458903570
<input checked="" type="checkbox"/>	Laura	Alvarez	555555555
<input type="checkbox"/>	Lulu	Alvarez	878326455
<input type="checkbox"/>	Lysol	Alvarez	000270341
<input type="checkbox"/>	Mariam H	Alvarez	163719880
<input type="checkbox"/>	Aubrey David	Alvis	790120876
<input checked="" type="checkbox"/>	Marko D	Alvis	470334360
<input type="checkbox"/>	Sava'ah R	Alzner	493740759
<input type="checkbox"/>	Jimna D	Amaya	699804600
<input type="checkbox"/>	Lera Kay	Amaya	258987805
<input type="checkbox"/>	Luisa Bruce	Amonett	314626956
<input checked="" type="checkbox"/>	Anita	Amtoinete	939589805
<input type="checkbox"/>	Tanesha M	Anaya	579114469

Close

The **Students** will then be added to the **Selected Students** display grid at the top.

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X

Close

Bulk Assign Action Items

Select students using:

☒ Students list

☐ Student Groups

Select

Selected Students

First Name	Last Name	Id
Laurie Kay	Alonso	571449126
Laura	Alvarez	555555555
Marko D	Alvis	470334360
Anita	Amttoinete	939589805
Christine	Wesley	555000000

Select Action Item(s) using:

☐ Action Items

☒ Action Package

Select

Selected Action Items

Action Type	Mnemonic	Description
TRIO SSS	SSS100	Visit the SSS Program to Explore their Services

Date Assigned

03/12/2020 03:13 PM

Date Due

☒ Wed, Apr 15, 2020, 03:13 PM

Assigned By

Super User

Assignment Notes

Assign

If you prefer to select the **Students** from a group, click the **Student Groups** radio button and then click **Select**. You can then select one or more **Student Groups** to populate the **Selected Students** display grid with all the student belonging to those groups:

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Close

Bulk Assign Action Items

Select students using:

Students list

Student Groups

Select

Select student(s) using:

Action Items

Action Package

Select

Date Assigned

03/12/2020 0

Date Due

☒ Wed, Apr

Selected Students

Bob

Aaron

Angeneq

Laura

Nick

Cetin

Chadd

James

Roxanne

David

Diego

Mike

AccuSQL - Build 20.0.0

Group

☐ Rejected SAR

☐ Former Military

☐ CIS Dream Team

☒ At Risk

☐ zero

☐ In State

☐ FORME MIL MATH

☐ Work Studies

☐ Zees

☐ Julian's At-Risk Kid

☐ Students with Scienc

☐ WR-Test Group

☐ Female English Stude

☐ ALL

☐ Test Group

☐ Freshman

☐ Female Juniors

☐ Math Students Zero V

☐ soccer team

☐ SP2020 Freshman

☐ Freshman Chemistry M

Close

Id

995451111

000224411

581723436

555555555

666666666

222222222

333333333

888888888

825474060

444444444

777777777

999999999

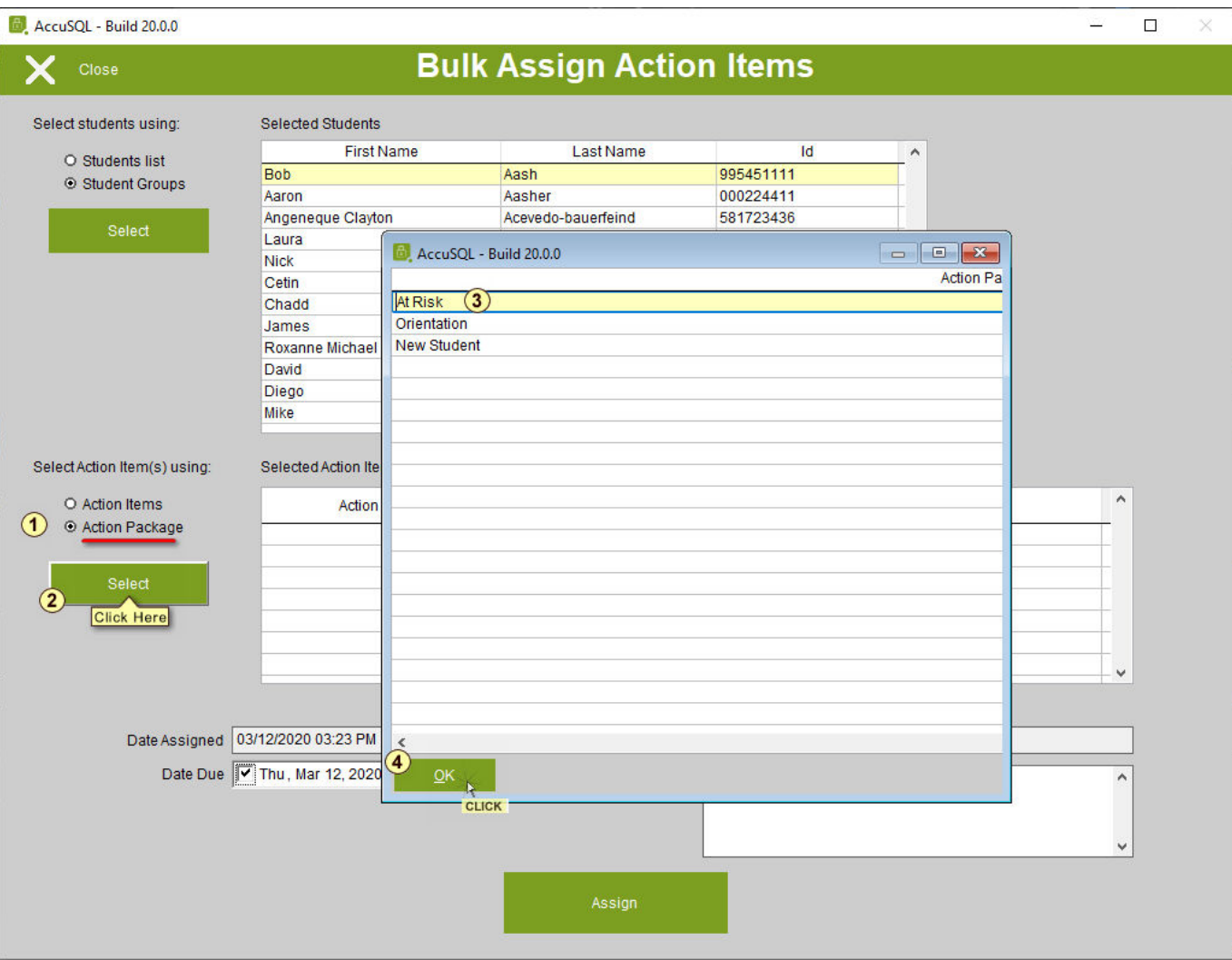
Description

it the SSS Program to Explore their Services

Super User

Assign

After you have selected the desired students, using either method, click either the **Action Items** radio button or the **Action Package** radio button and then click **Select** to add the desired items to the **Selected Students** and then click **OK**.



Finally, change the **Due Date** if so desired, enter any **Assignment Notes** and then click the **Assign** button to assign the **Selected Action Items** for the **Selected Students**. After the process is done, you can then click **Close**. You can now access this information on the **Success Plans > Student Plans** screen to work with the individual **Students** you created the **Action Items** or **Action Packages** to complete them.

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Close

Bulk Assign Action Items

Select students using:

Students list

Student Groups

Select

Selected Students

First Name	Last Name	Id
Bob	Aash	995451111
Aaron	Aasher	000224411
Angeneque Clayton	Acevedo-bauerfeind	581723436
Laura	Alvarez	555555555
Nick	Armstrong	666666666
Cetin	Basoz	222222222
Chadd	Blodgett	333333333
James	Dean	888888888
Roxanne Michael	Farias	825474060
David	Foster	444444444
Diego	Jancic	777777777
Mike	Nash	999999999

Select Action Item(s) using:

Action Items

Action Package

Select

Selected Action Items

Action Type	Mnemonic	Description
TRIO SSS	SSS100	Visit the SSS Program to Explore their Services

Date Assigned

03/12/2020 03:13 PM

Date Due

Wed, Apr 15, 2020, 03:13 PM

Assigned By

Super User

Notes

Assign

# INDIVIDUAL EDUCATIONAL ACTION PLAN REPORT

**Purpose:** Use this section to pull a report on a **Student's** progress in their Student Success Plan.  
**How to Access:** From **System Administration**, click **Success Plans** then the **Reports** button in the bottom right to access the **Individual Education Action Plan Report**.

Note: You can filter this report for specific **Students** or **Student groups**:



The screenshot displays the 'Reports' window in AccuSQL - Build 20.0.0. The window has a green header bar with a close button and the title 'Reports'. On the left is a sidebar with a tree view containing: Success Plan Reports (with sub-items Individual Educational Action Plan and Assigned Items by Tutor), Memorized Reports, Customized Reports, Favorites, Downloaded Reports, and Scheduled Reports. The main area is divided into three sections. The top section, titled 'Time Format', shows a list of student groups under the heading 'AccuSQL - Build 20.0.0'. The groups are: Rejected SAR, Former Military, CIS Dream Team, **At Risk** (selected with a blue highlight), zero, In State, FORME MIL MATH, Work Studies, Zees, Julian's At-Risk Kid, Students with Scienc, WR-Test Group, Female English Stude, ALL, Test Group, Freshman, Female Juniors, Math Students Zero V, soccer team, SP2020 Freshman, and Freshman Chemistry M. Below this list is a 'Close' button. The right section, titled 'Filter On', contains a 'Period' dropdown set to 'This Semester', 'From' and 'To' date/time pickers (Wed, Jan 01, 2020, 12:00 AM to Sun, May 31, 2020, 11:59 PM), and a list of checkboxes for filtering: Students, Activities, Tutors, Instructors, Media, **Student groups** (checked), Service Type, Sports, Lab IDs, and Tutor groups. A 'Set Filter' button is next to the 'Student groups' checkbox. At the bottom of the window are three buttons: 'Show Report', 'Export Data', and 'Create Student Group'.

**TIP: Students** can also run this report for themselves from the **Student Pad > Reports** screen from the Sign-in Station or online via the [Web Gateway](#) Add-on.

Other reports for **AccuTrack/AccuSQL** are available in the [Reports Manual](#).

[Previous - ADD-ONS OPTIONS](#) | [TABLE OF CONTENTS](#) | [Next - SUCCESS PLAN SETUP OPTIONS](#)

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<https://attendance-tracking.com/docs/> - **Engineerica Documentation**

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Last update: **2020/03/12 15:40**

