New Release V3
Field Trip Process

Chinook's Edge School Division Online Field Trip Process

inspiris

CONTENTS

Change Final Approval for Category 2 & 3 Field Trips

The Category 2 & 3 field trips approval process has been updated
1. The Teacher submits the initial field trip form for Category 2 & 3 trips.
2. The Field Trip form is sent to the Superintendents' office for Initial Review and Approval.
3. 30 days prior to the trip departure date, the **Principal Office** is to review and give Final Trip Approval.

Steps for Category 2 & 3 Field Trip Process and Approvals
The teacher submits the field trip request.

1. The task is sent to the Superintendents' Office to grant Initial Approval.

2. Initialized Field Trip
   a. Workflow creates a Pending field trip folder in the repository and assigns a trip ID
   b. The teacher is notified the trip has received initial approval
   c. The Field Trip Request form is saved in the Pending trip folder in the repository.

3. The task "Prepare Parent Meeting Invites" is assigned to the Principal Office
   a. The **Principal Office must manually send** the email to invite parents to the initial trip meeting
   b. Once the meeting has taken place, the principal office must **submit the form** to move to next step.

4. The task "Update the Student List and Send Consent Forms via Email" is assigned to the Principal Office
   a. Review and update trip details
   b. Review and update the student list for the trip, submit the form.

5. After the form is submitted, the workflow will send the consent forms to parents.

6. If the trip has fees, the task is sent to the RYCOR team to setup the fees prior to the email going to parents.

7. The trip folder is moved to the Approved folder in the repository
   a. The teacher receives an email that the trip is approved and a link to the Teachers Status Report for the field trip
   b. Student folders are setup in the Approved Trip folder in the repository.

8. The task "Waiting for Trip can be updated" is assigned to the Principals Office
   a. The form can be updated up to 30 days before the trip by the Principal Office
   b. The trip can be cancelled or postponed at any time. *NOTE this is a manual process for Category 2 & 3 Trips it is NOT following the same process as Category 1 Trips.*

9. 30 days before the trip departure date, the task "Final Trip Approval by Principal Office" is assigned to the Principal Office for Final Trip Review
   a. The Principal Office can Approve or Cancel the trip
   NOTE this is a manual process for Category 2 & 3 Trips it is NOT following the same process as Category 1 Trips.

10. Completed Field Trip process
    a. An email is sent to the trip leader to complete the field trip form. **This is an important step for teachers to complete.**
    b. The teacher will receive reminder emails every 7 days until this has been completed.

11. The teacher is to complete the form after they return from the trip and upload any Medial Logs and or Incident forms if required.

12. **NEW – Trip Package**
    a. **The Trip Package can ONLY be generated after Final Approval has been granted by the Principal Office.**

Postpone or Cancel Category 1 Field Trips

A Category 1 Field Trip can be postponed or cancelled in the following tasks by the Principal Office
1. Waiting for Field Trip Can Update Form
2. Review Trip Final Approval
3. Approved Trip, can update the Student List until the Trip End Date.

The postpone or cancel trip process will **automatically** complete the following
Notify the Teacher that the trip has been postponed or cancelled
Notify Parents by email that the trip has been postponed or cancelled
Update the trip dates and return to the field trip task when the trip has been postponed.

How to Postpone a Trip

1. In the Field Trip Decision Section
   a. In the **Waiting Trip Decision** in the dropdown, select **Postpone Trip**
2. Enter the reason for postponement in the forms comments section, this will be sent to the Teacher
3. Click Submit.

New - Postpone or Cancel Trip Form

1. A task is assigned to the Principal Office to "Postpone or Cancel the Trip Form"
2. Decide to Proceed or Cancel the trip.

To Proceed with the Trip

   a. Select "Proceed With New Dates"
   b. Enter the rescheduled date(s) for the trip
      For **DAY TRIPS**, **Rescheduled Trip Date** and **Rescheduled Trip End** date **MUST** be the Same Date
   c. **Rescheduled Trip Parent Message**
      • Enter a message in the body of the email being sent to all trip parents
   d. Submit the form.

To Cancel a Trip

   a. Select "CANCEL Trip"
   b. **Cancelled Trip Parent Message** - Enter Message for body of email sent to all trip parents
   c. Submit form.
   d. Emails are sent to the Teacher and **All Parents** of students in the trip list.

How to Cancel a Trip

A trip can be cancelled in any of these tasks
- Waiting for Field Trip Can Update Form
- Review Trip Final Approval
- Approved Trip, can update the student list until the Trip End Date.

In the Field Trip Decision Section
- In the **Waiting Trip Decision** dropdown, select **CANCEL Trip**
- Complete the **Cancelled Trip Parent Message**

Enter the reason the trip is cancelled in the forms Comments section, this will be sent to the Teacher
Submit the form
Emails are sent to the teacher and all parents of students on the trip list.

Field Trip Decision
Select option from drop-down then submit to proceed

Waiting Trip Decision	CANCEL Trip ▼
Cancelled Trip Parent Message *	*This message will inform the parents why the trip was cancelled.*

NEW – How to Postpone or Cancel ONE Date in a Multiple Date Field Trip

When a trip has a Departure Date and an End Date such as Swimming Lessons or Sports Tournaments with several event dates, use the following steps:

To Postpone One Event Trip Date

The postponed date is added to the **END** of the trip schedule
    On the New Postpone or Cancel Trip Form
1. Select "Proceed With New Dates"
   - Enter Rescheduled dates for the trip

   Rescheduled Trip Date - **Do Not Change**
   Rescheduled Trip End – **Change** to the **NEW** Date for last day of event
   - **Rescheduled Trip Parent Message**

   Enter a message in the body of the email being sent to all parents
       Include details regarding the One Event Date that has changed and the New Date
   - Submit the form.

NEW – To CANCEL One Event Date

For trips where the cancelled date is between the Beginning and the End of the trip's schedule
> On the New Postpone or Cancel Trip Form
> 2. Select "**Proceed With New Dates**"
>   **Note: Selecting CANCEL Trip will cancel the ENTIRE TRIP NOT ONE Event Data**
>   - Enter the rescheduled dates for the trip
>   **Rescheduled Trip Date - Do Not Change**
>   **Rescheduled Trip End – Do Not Change**
>   - **Rescheduled Trip Parent Message**
>   Enter a message in the body of the email sent to all parents
>   *Include details regarding the One Date that has been CANCELLED*
>   - Submit the form.

Email Notifications for Students on the Field Trip Wait List

On the Field Trip form, the value for the Max Number of Students for a trip is used to limit the number of students attending trip. Consent forms are counted as they are returned by parents.

Once the maximum number of students is reached, the following process is followed:
1. The trip teacher receives an email that the trip is at the max student value that was entered by the teacher.
2. The principal office receives an email that the trip is at max student
   a. As consent forms are received and if the student is wait-listed, the parent will receive an email that their student is now on the wait list.

Principal Office Review and Update Key Trip Fields

Key Trip Dates

When the Principal Office is reviewing a field trip form for Initial Approval the following KEY Date Fields need to be evaluated:

General

Educational Goals of Field Trip*	
Grade Level of Class*	

Accepted Grade Examples: K || 4 || 7 8 10 || 1-3 || 1-3 5

Email Consent Forms on*	📅
Consent Forms Required By*	📅
Trip Departure Date*	📅
Trip Return Date*	📅

- **Email Consent Forms on** – is the date consent and medical forms will be emailed to parents/guardians
- **Consent Forms Required by** – is the date on form emailed to parents/guardians
- **Trip Departure Date** – is the date the trip starts
- **Trip Return Date** – is the date the trip ends.

Once the field trip has initial approval and any fees are setup, the Trip Departure and Return dates can only be updated by using the Postpone trip process.

Max Number of Students

The Max number of students can be updated during the process by the Principal Office using "Update Forms" in the Waiting Trip Decision dropdown list.

Field Trip Decision

Select option from drop-down then submit to proceed

Waiting Trip Decision	Update Forms ▼

Update Forms
Postpone Trip
CANCEL Trip

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NEW - Attach an Additional File to Parent Email

Teachers can attach an additional document to the parent consent and medical email

- **Only one document can be uploaded**
- Recommend uploading PDF format, maximum size 5MB
- If more than one document is required, scan documents and merge into ONE PDF document
- The uploaded document is saved in the Field Trips Folder in the repository
- Parents cannot return the PDF document via email
- Parents can download the document form email and print it at home.

NEW - Teacher Closing Trip Comments

A field has been added with an informational Comments field to the form for teacher comments regarding the field trip.

NEW - Teacher Field Trip Status Report

The updates have been added to the Field Trip Status Report
- Row numbering to student list.

Total Students Section Contains

- Total Students in List
- Max Students on Trip
- Students on Wait List
- Student Not on Wait List
- Students with forms
- Students without no forms
- Students Paid Fees.

How the Form Closes

When the trip does not have Final Principal Approval, the **Submit** Button will close and exit the Teacher Status Report.

How to Generate the Trip Package

After the Principal Office has granted Final Approval the ACTION field is added to Teacher`s Status Report
- Select **Close Form** and click **Submit** to close the form and exit
- Select **Generate Package** and click **Submit** to create trip package and email to trip teacher.

Principal Office Repository Search, Students with Consent Forms

- Added new field **Has Submitted Forms** to Field Trip Student Template
- Created two Custom Quick Search to Repository for Everyone
  - All Student Field Trip Forms by **Trip ID**
  - All Student Field Trip Forms by **School ID**
- Created Custom Column View **Field Trip – Submitted Forms.**
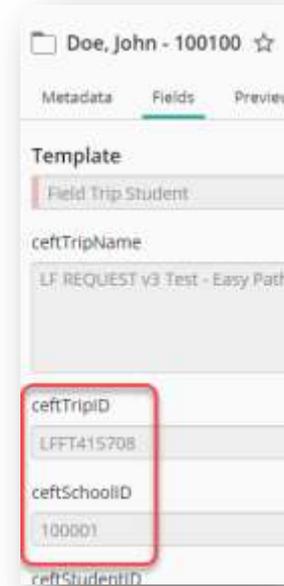
Using Custom Quick Search

Before using a Field Trip custom quick search, you will need to know either the Field **Trip ID** or the **School ID**. This data can be found on any Students Folder within the repository.

Quick Search All Student Field Trip Forms by Trip ID

- Click dropdown on search bar
- Select **Student Field Trip Forms by Trip ID**
- Enter **Trip ID** in Search Box
- Click **Search** button.
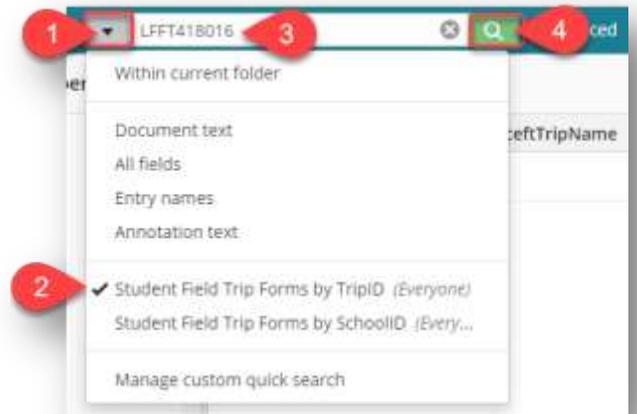
Quick Search All Student Field Trip Forms by School ID

1. Select **Student Field Trip Forms by School ID**
2. Enter **School ID** in Search Box
3. Click **Search** button.

Quick Search Results

Using Column Picker

1. **Right Click** on Column Header in the repository
2. Select **Saved** Columns
3. Select **Field Trip – Submitted Forms**
4. OR Select **Column Picker** to Customize displayed columns.