Field Trip Process Principal's Offices – How to Guide

Chinook Edge School Division No. 73 Online Field Trip Process

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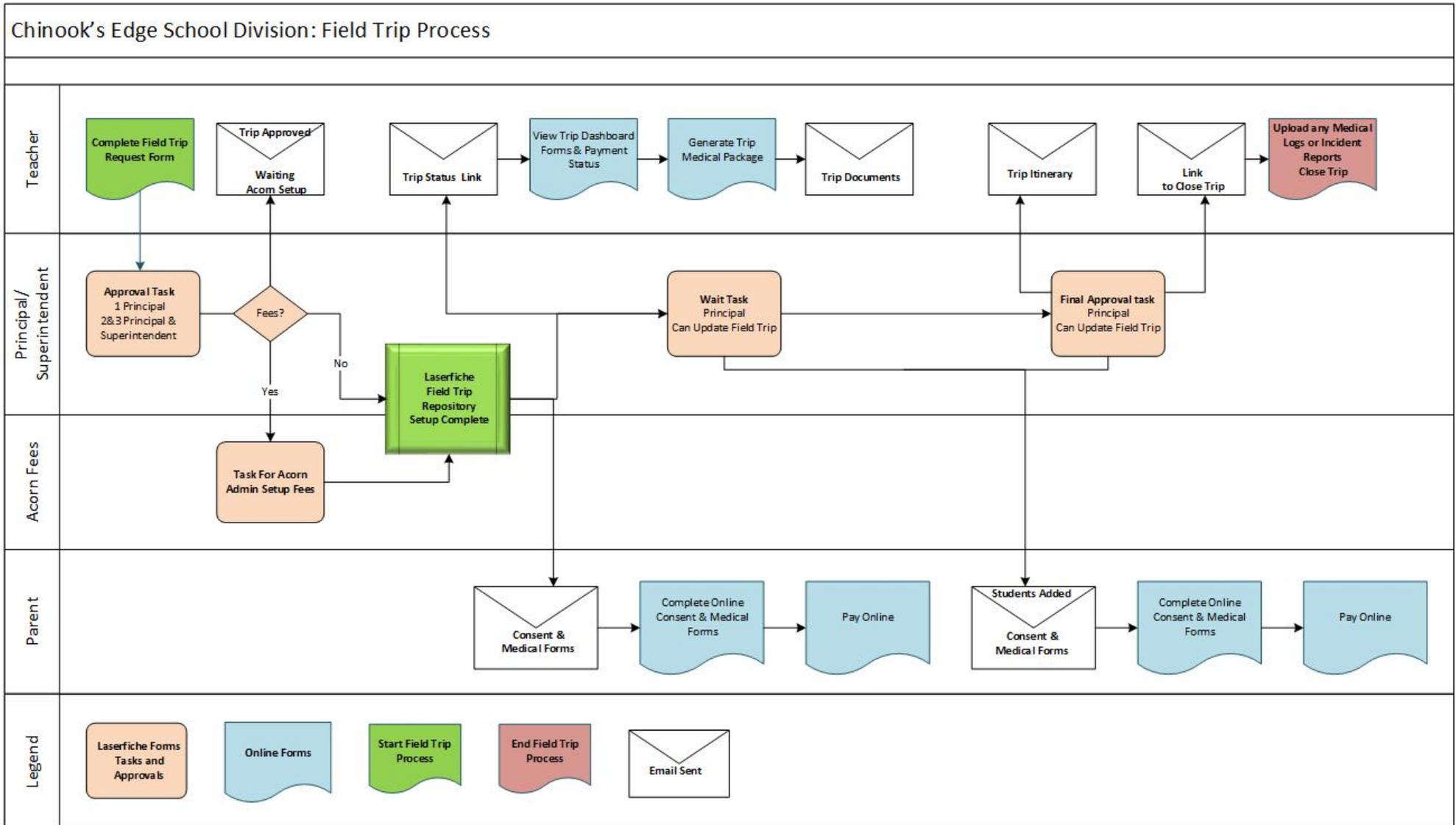inspiris.ca
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Access to Field Trip Forms, Tasks and Documents

Access Online Field Trip Forms

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

User Accounts for School

The Principal Office and Shared Teacher Users accounts are specific for each school within the Chinooks Edge School Division
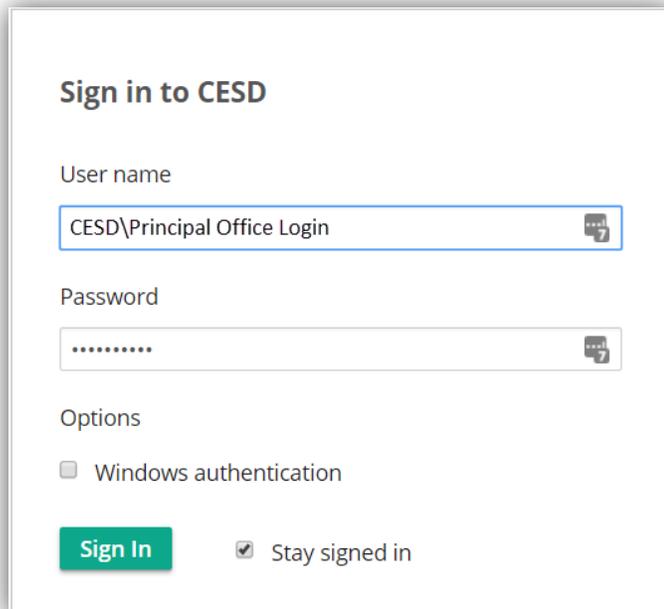
- Shared Teacher Account ---> School Abbreviation-Teachers
- Principal Office Account ----> CESD\School Abbreviation-principaloffice

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.
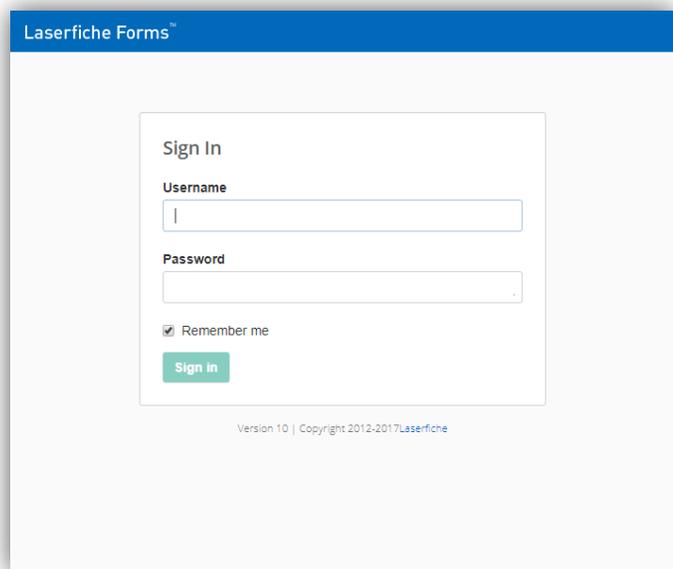
Laserfiche Forms™

Sign In

Username

Password

☑ Remember me

Sign in

Version 10 | Copyright 2012-2017 Laserfiche

Sign in to CESD

User name

CESD\Principal Office Login

Password

••••••••••

Options

☐ Windows authentication

Sign In   ☑ Stay signed in

Access Field Trip Documents

- https://records.cesd73.ca/laserfiche
- 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 ← 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.
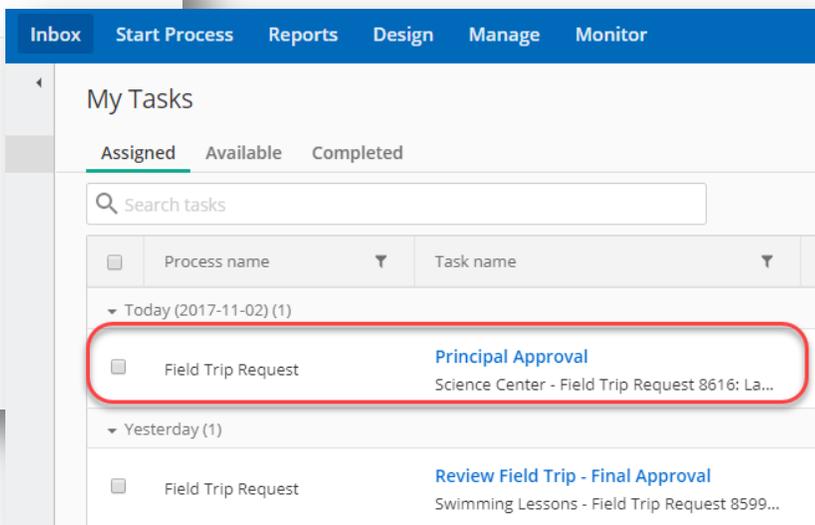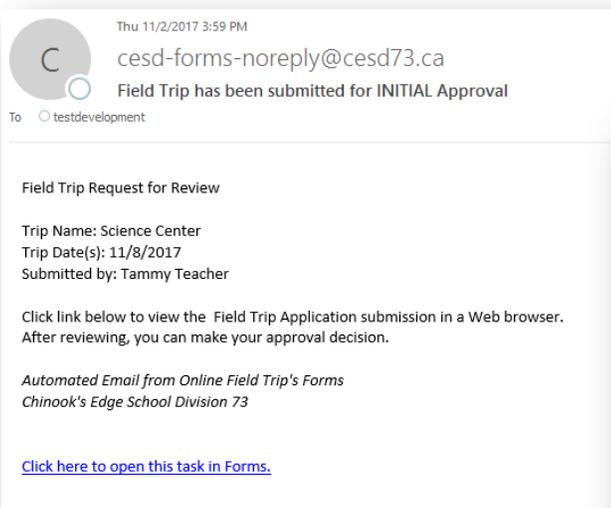
Trips without fees: will be sent to parents after principal approval
Trips with fees: will be sent to the Finance Team for fees to be set up. This may take two days. Once the fees are approved and set up, parents will receive an email.

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.
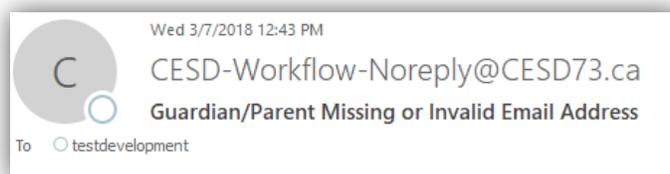
Waiting for Trip Date Forms can be updated

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, o*nly 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.
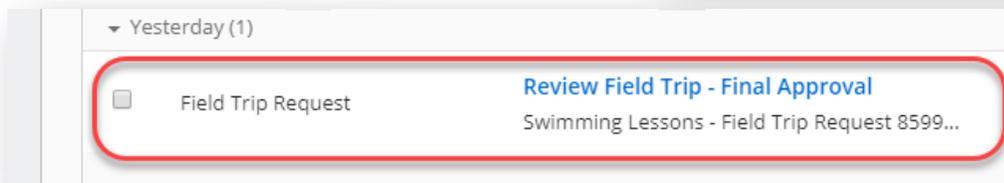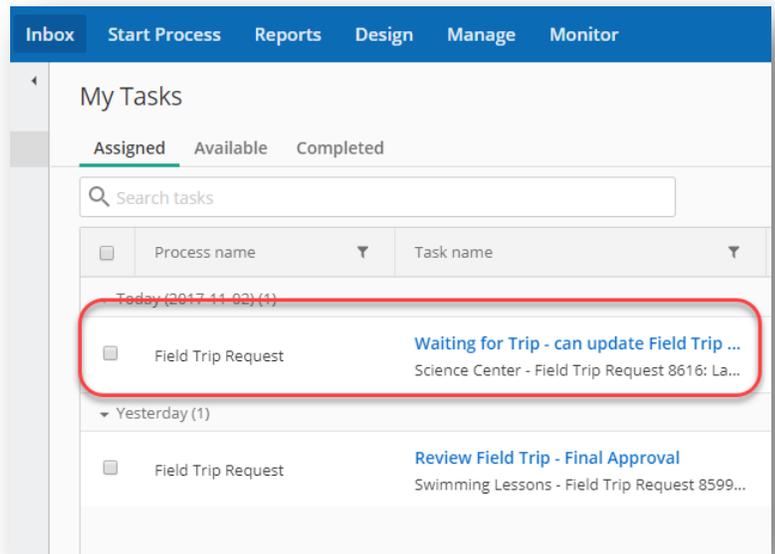
Final Trip Approval

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.
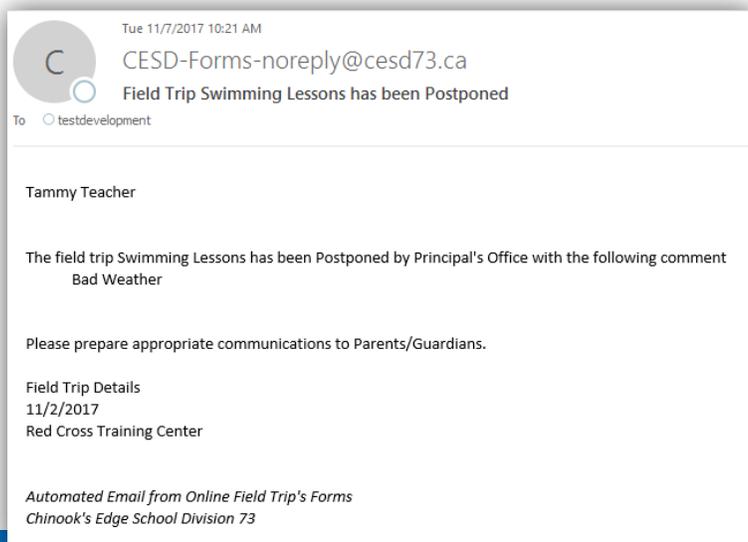
Field Trip Decision

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.
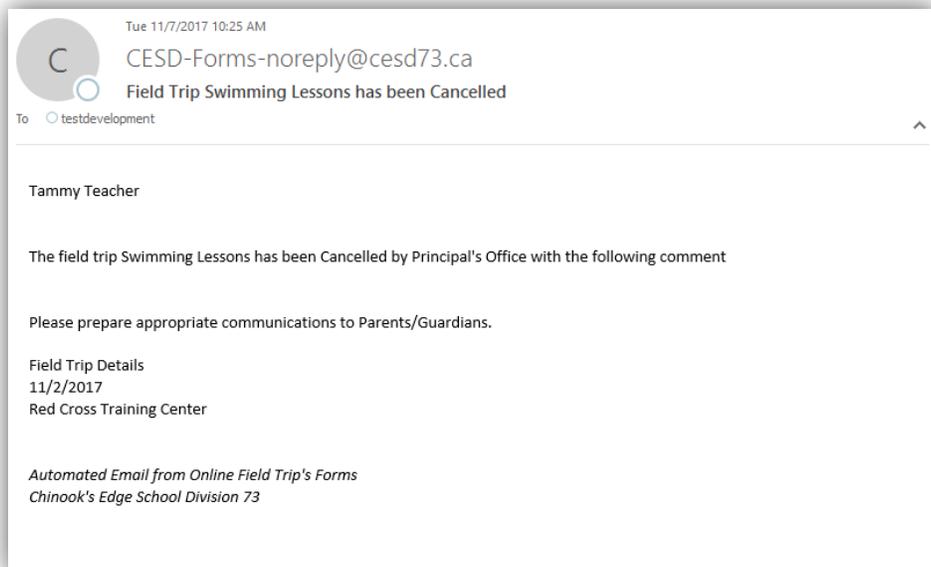
Cancelled Trips

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**.

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.**
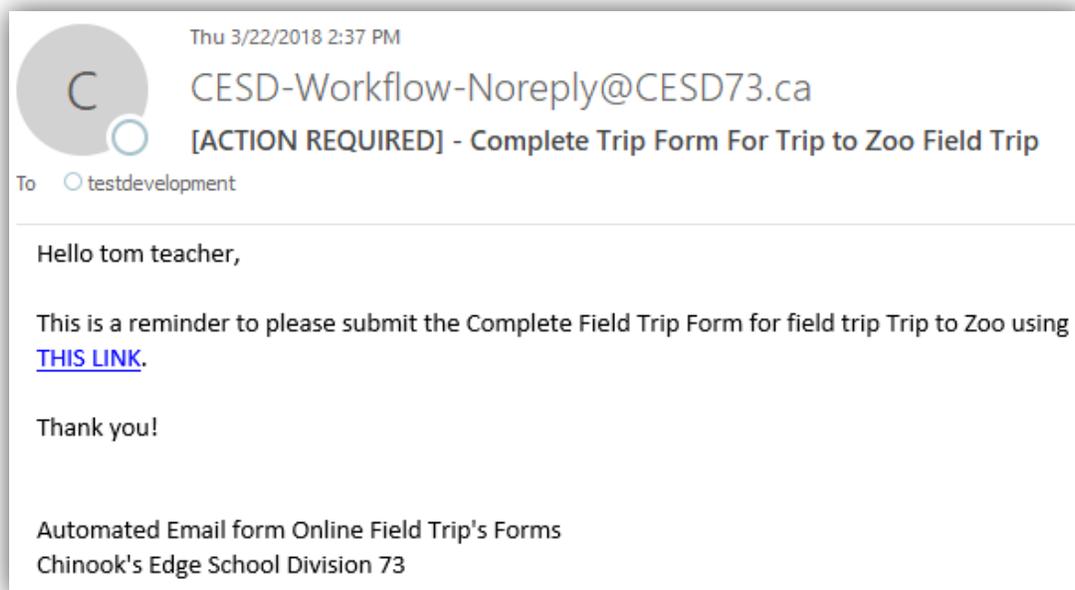
Shared Principal Office Mailbox

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.
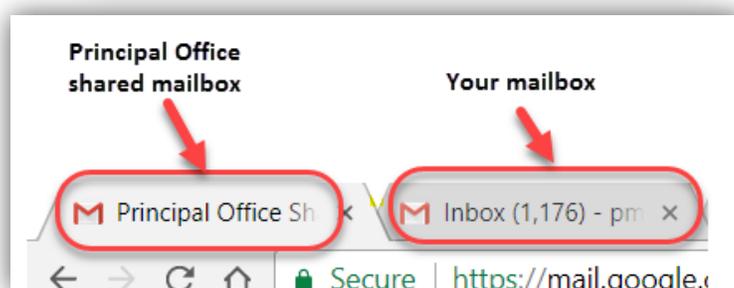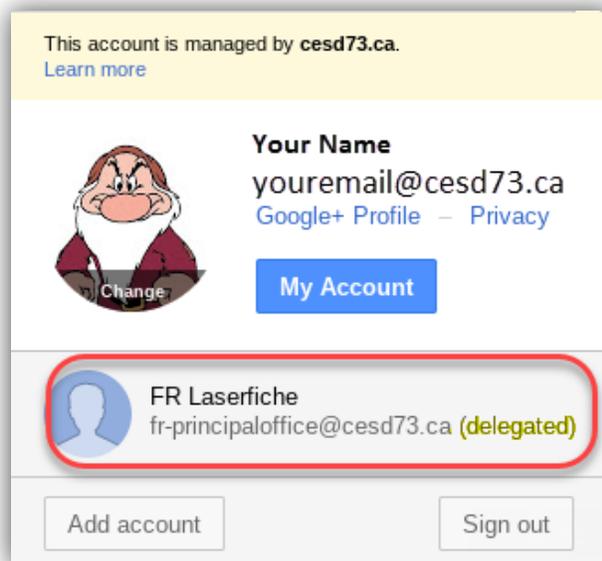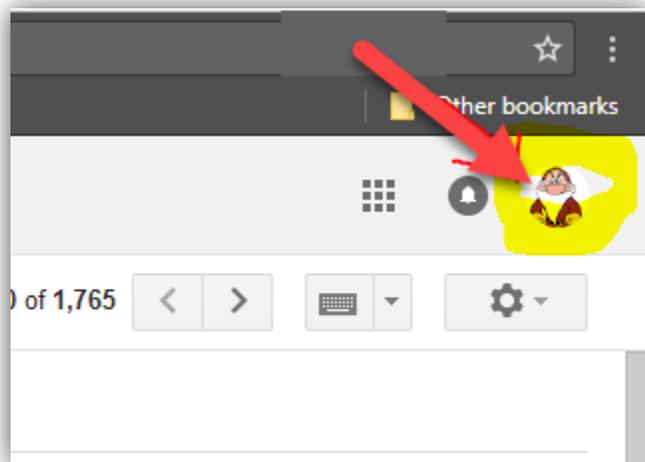
Special Groups – School Teams; Extracurricular Activities

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
- https://records.cesd73.ca/laserfiche
- 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
- Log into the Laserfiche Repository
- Click Schools then select your school folder.
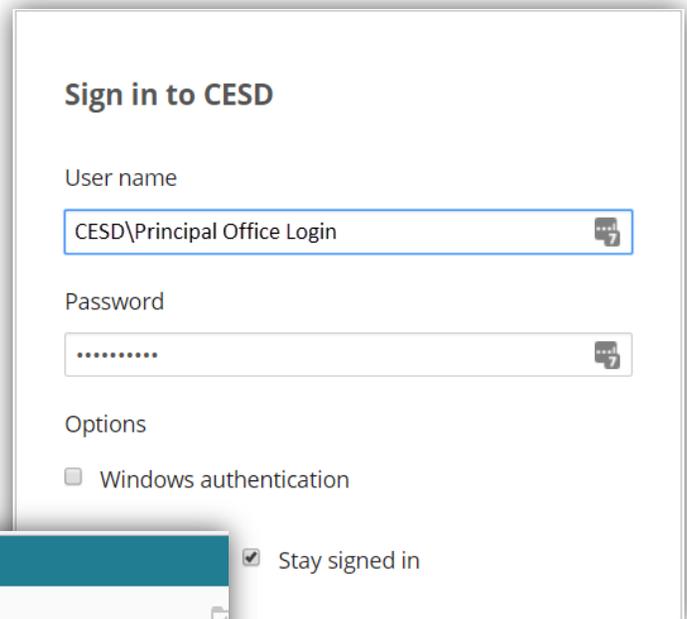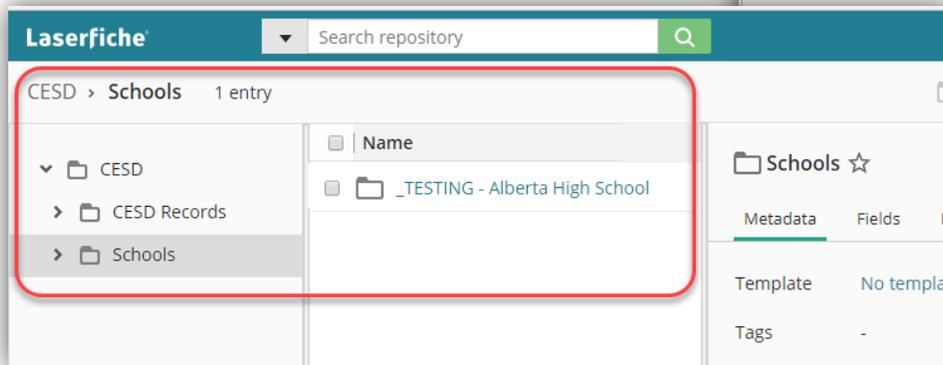
The School Field Trips folder contains three subfolders
1. **Pending** - trips with initial approval pending completion of setup
2. **Approved** – trips approved and the setup has been complete, waiting for trip completion
3. **Completed** – trips completed
   a. No Incidents – with no Health and Safety incidents during trip
   b. With Incidents – with Health and Safety incidents during trip
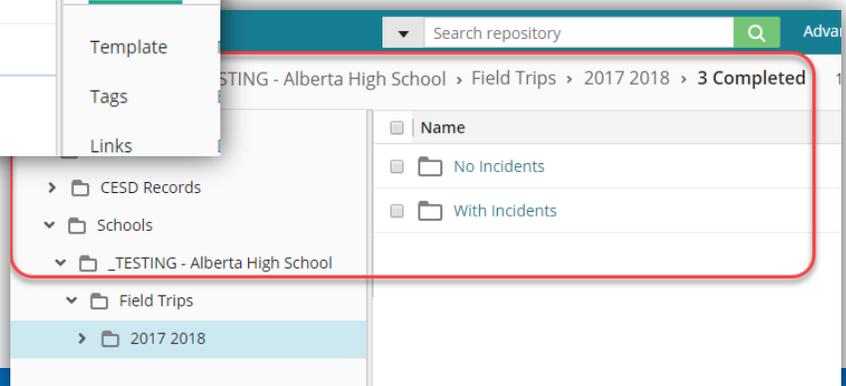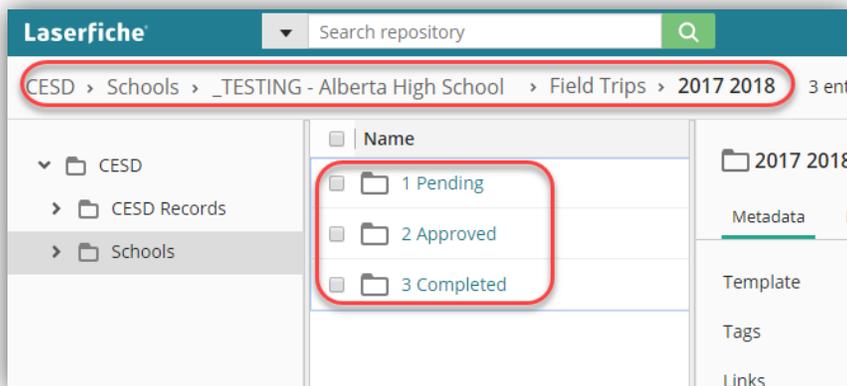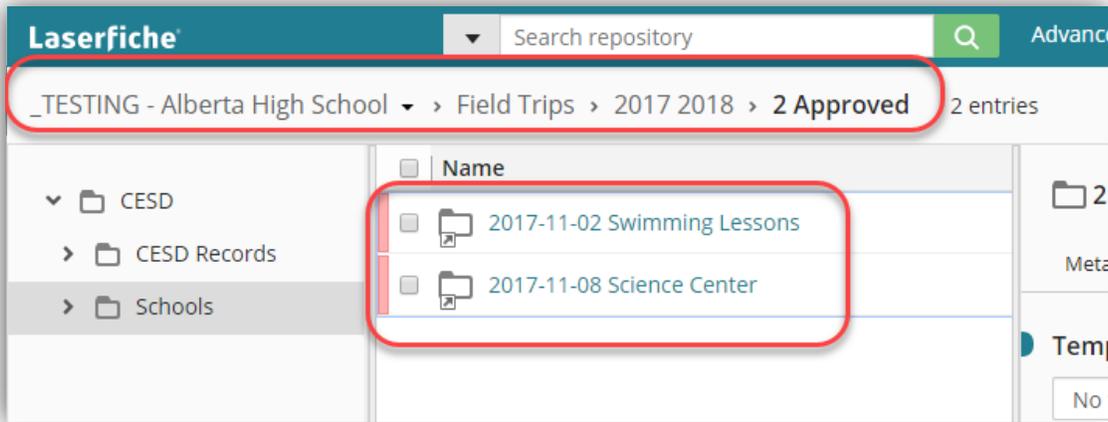
Each Field Trip folder contains the following documents and folders
1. Field Trip Request form
2. As trips progress through the approval process
   a. Complete Student Medical Package
   b. Field trip Student list
   c. Field Trip Itinerary
3. Folders for each student.
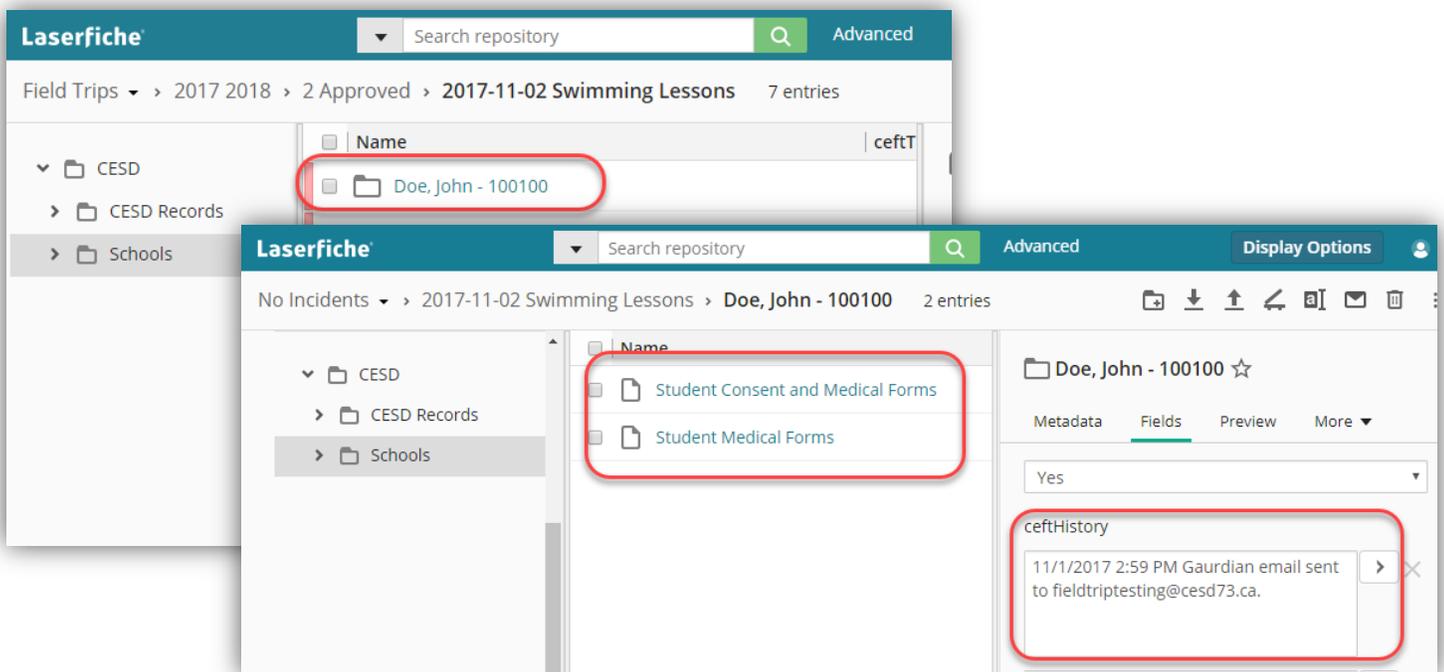
Within each student folder, the completed parent/guardian consent and medical form is saved. A copy of the medical form only is saved separately to be included within the Field Trip Medical Package generated by Teachers from the Field Trip Status form. The Student folder has the Metadata tracking history 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. **DO NOT USE** slashes (/ \) or Periods(.), Commas (,), Hyphens (-) or Underscores (_) in the field trip name	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 "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.
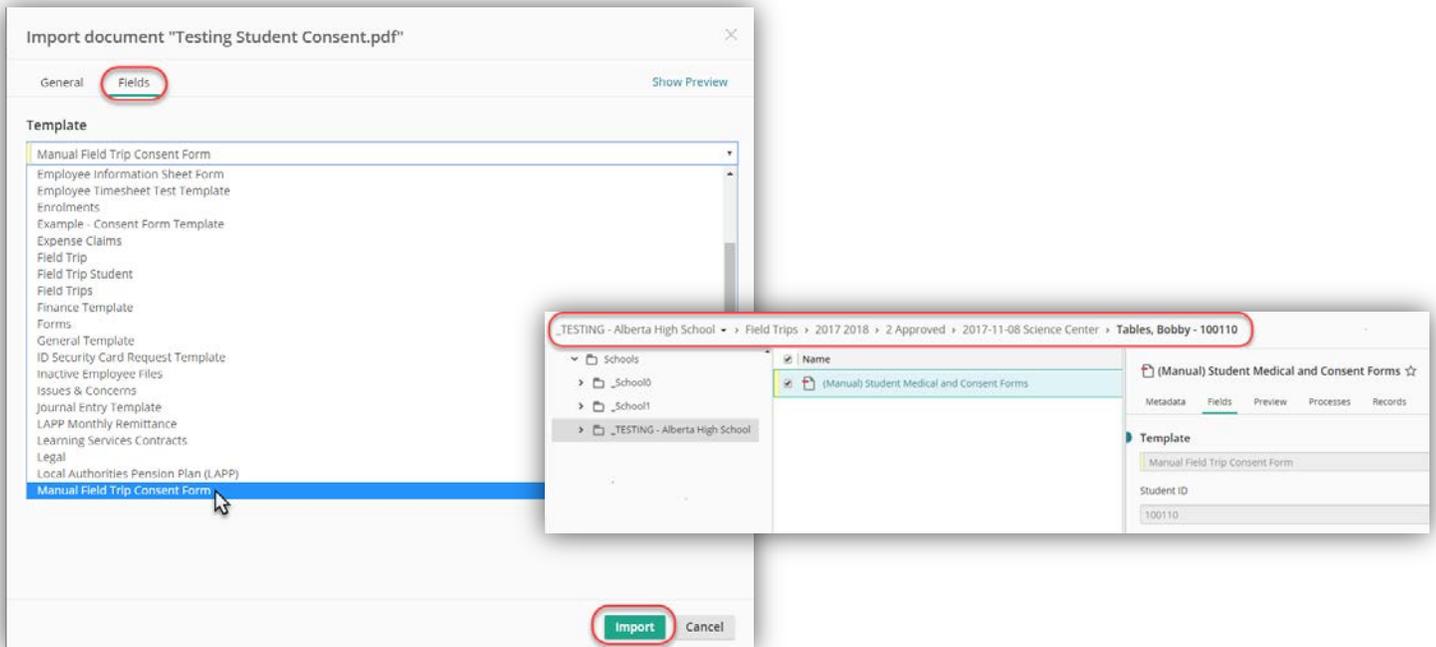
Resending Consent & Medical Form Process

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.

a. The consent and medical email will be resent to the parent/guardian email address
b. The *ceftHistory* is updated with the date, time and address the email was sent to.

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.