MyTeachingStrategies™

Administration

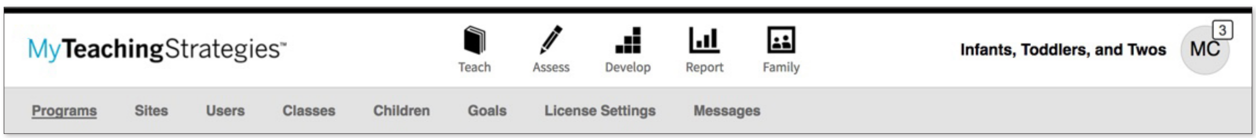
To access your administration settings, select the profile icon in the upper right corner of any screen, and select Administration.

How-To Guide to Administrators

Administration

MyTeachingStrategies™ is organized to give administrators different levels of access according to their roles in their organizations. Administrators may be granted access at the organizational, program, or site level. An organizational level administrator will have access to all of the data for his or her entire organization. A program or site administrator only has access to the data for his or her respective program or site.

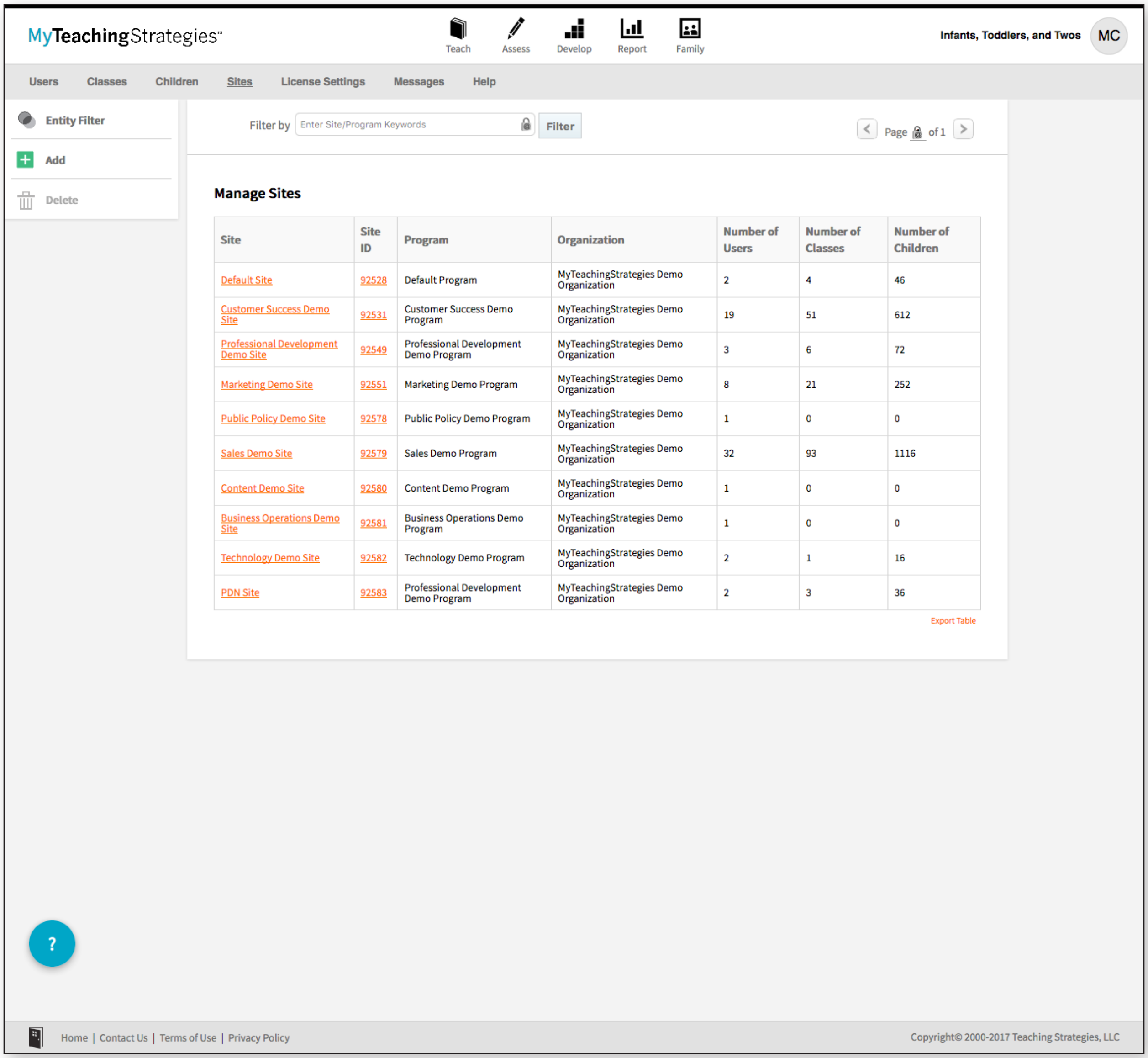
The Administration area is where you set up programs, sites, and classes; add children and users; establish goals; add messages; and manage license settings.



Please note: Depending on your level of access, you may not see all links in the Administration sub-navigation.

Sites

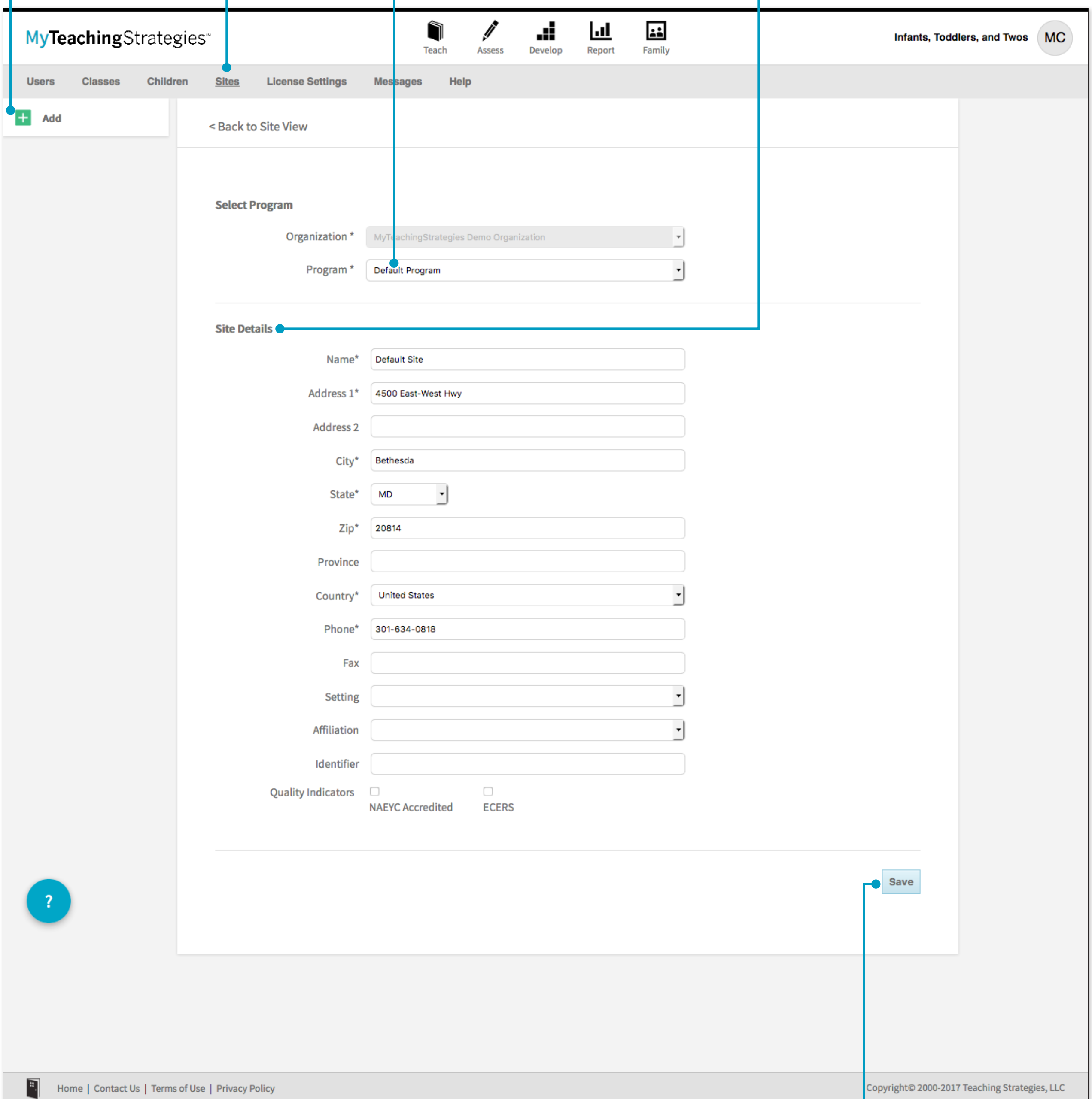
The Sites area enables you to add new sites, and manage or delete your existing sites. The main Sites screen provide an overview of the sites in your organization.



Site	Site ID	Program	Organization	Number of Users	Number of Classes	Number of Children
Default Site	92528	Default Program	MyTeachingStrategies Demo Organization	2	4	46
Customer Success Demo Site	92531	Customer Success Demo Program	MyTeachingStrategies Demo Organization	19	51	612
Professional Development Demo Site	92549	Professional Development Demo Program	MyTeachingStrategies Demo Organization	3	6	72
Marketing Demo Site	92551	Marketing Demo Program	MyTeachingStrategies Demo Organization	8	21	252
Public Policy Demo Site	92578	Public Policy Demo Program	MyTeachingStrategies Demo Organization	1	0	0
Sales Demo Site	92579	Sales Demo Program	MyTeachingStrategies Demo Organization	32	93	1116
Content Demo Site	92580	Content Demo Program	MyTeachingStrategies Demo Organization	1	0	0
Business Operations Demo Site	92581	Business Operations Demo Program	MyTeachingStrategies Demo Organization	1	0	0
Technology Demo Site	92582	Technology Demo Program	MyTeachingStrategies Demo Organization	2	1	16
PDN Site	92583	Professional Development Demo Program	MyTeachingStrategies Demo Organization	2	3	36

Adding Sites

1. To add a site, select SITES from the sub-navigation and select ADD from the left-hand navigation.
2. Select the program in which the site will be set up.
3. Add the specific site details including site address and contact information.



4. Select SAVE to add the new site.

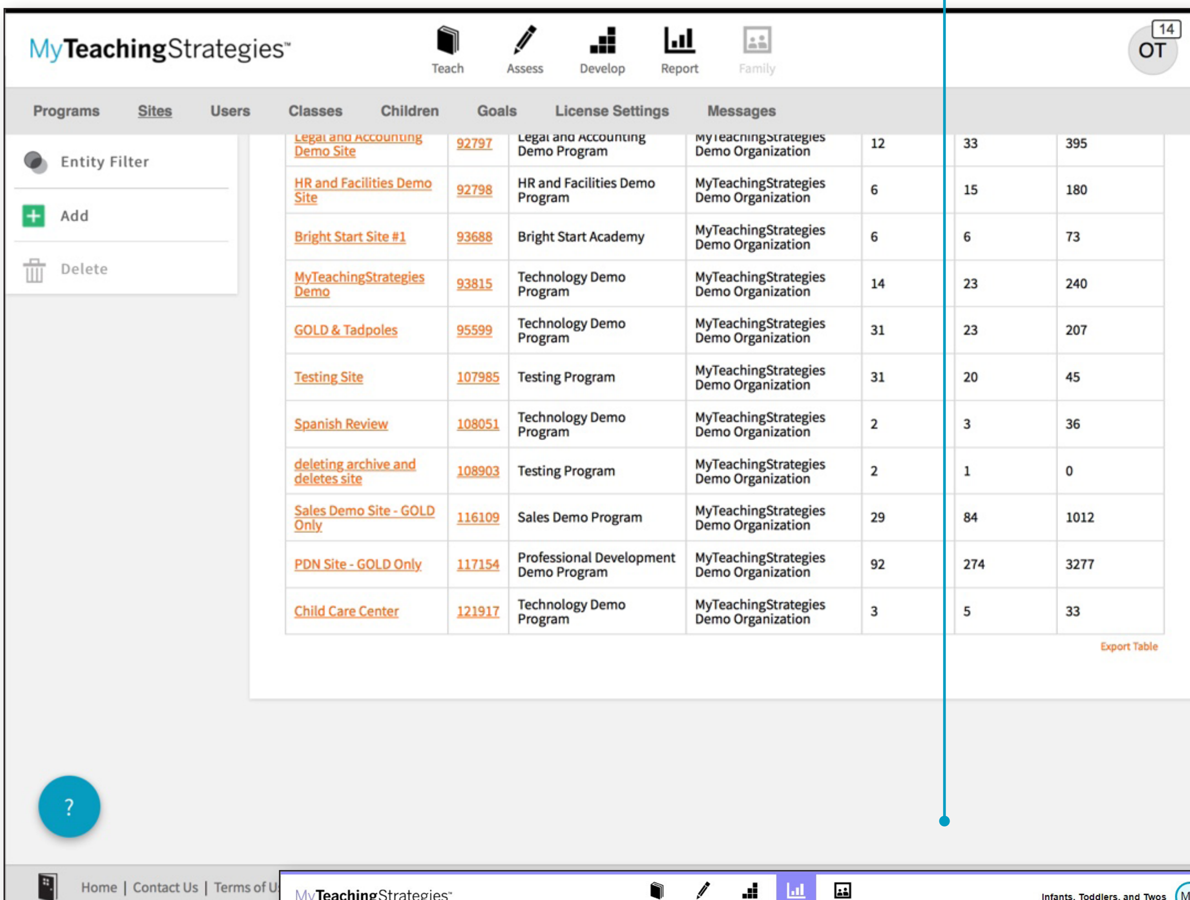
Managing Sites

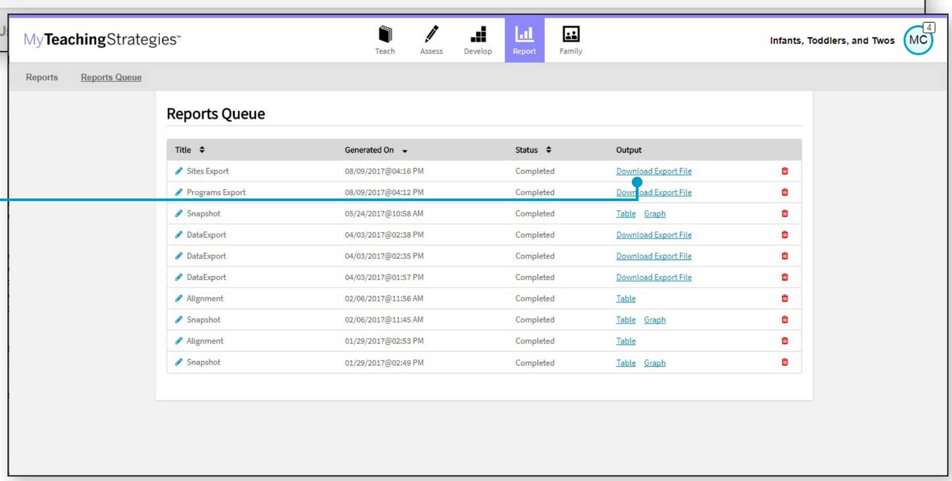
Within a site profile, you can update site information, change its affiliated program, and more. To edit information for an existing site, select the site name from the main Sites screen.

Exporting Site Information

You can export all of your site information into Excel using the export table option.

1 Select EXPORT TABLE from the bottom of the site list. You will be taken to the Reports Queue, where your export will generate.

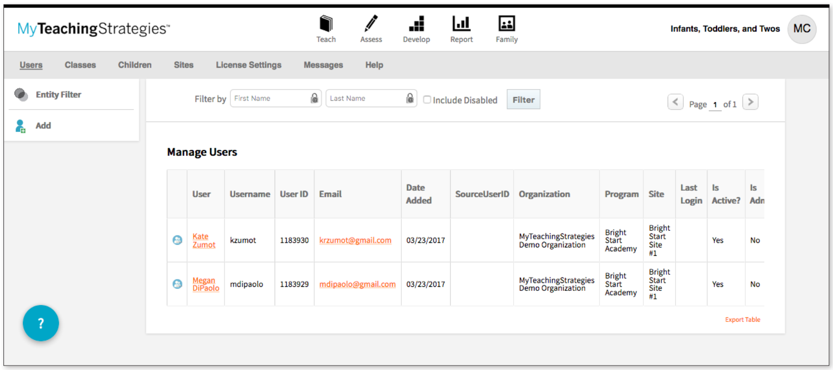




2 Select DOWNLOAD EXPORT FILE to download the Excel file.

Users

The Users area enables you to add users, reset their passwords, manage their profile data, and access their *MyTeachingStrategies*™ account as that user. The main Users screen provides an overview of your users including the date and time of each user's last login.



MyTeachingStrategies™ User Types

In *MyTeachingStrategies*™ you'll find several user types to choose from when adding a new user:

Teacher – this user can have access to classes, allowing them to create weekly plans, add documentation, access professional development, and generate reports. Primary and co-teachers will have the ability to enter and finalize checkpoint ratings, while assistant teachers can view checkpoints but cannot edit.

Administrator – this user can have administrative access over an organization, a program or multiple programs, or a site or multiple sites. As an administrator, this user can have standard access, which allows the user to manage the entities they have access over, view-only (can see child level data) access, which allows the user to view the entities they have access to and generate reports down to the child level, and view-only (cannot see child level data) access, which allows the user to view the entities they have access to and generate aggregate reports down to the class level.

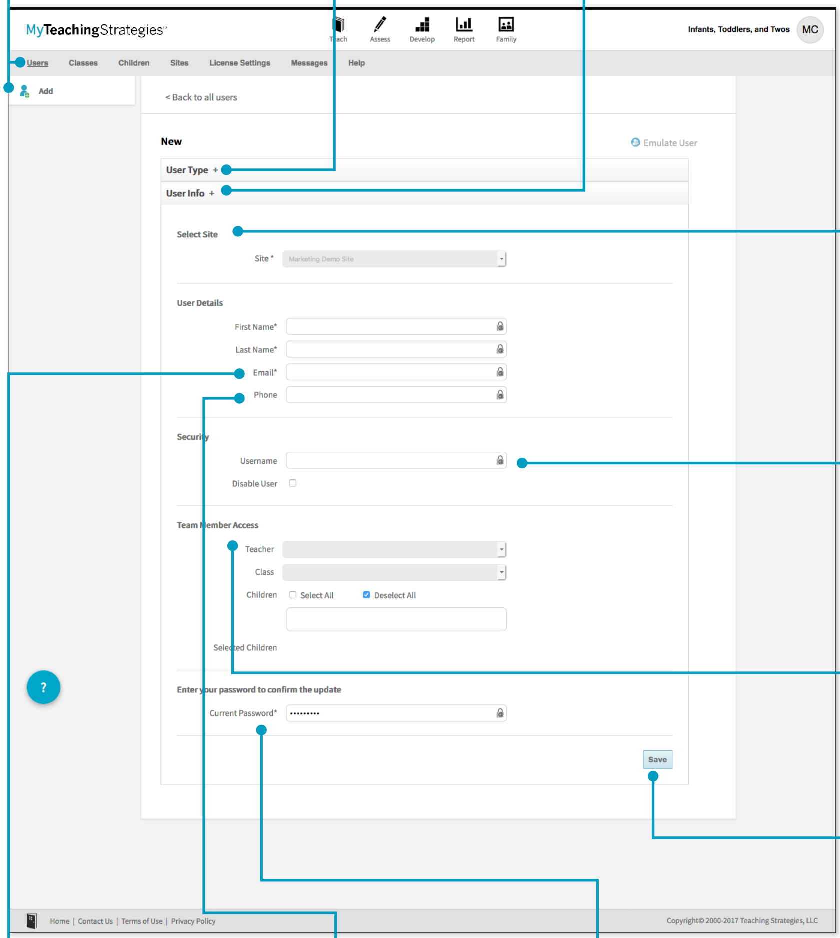
Team Member – this user can have access to individual children, spanning multiple classrooms. Team Members are often specialists that work with specific children instead of entire classrooms.

Adding User Accounts

1 To add a new user, select USERS from the sub-navigation and select ADD from the left-hand navigation.

2 Expand USER TYPE to select which type of account this user can access.

3 Expand USER INFO to input the specific user information.



4 Select the SITE the user account should be assigned to.

7 Assign a USERNAME that is different from all other usernames in the *MyTeachingStrategies*™ online system, not just in your program. If the username is already taken, an alert will appear after you click SAVE.

8 With access to Team Central, you can assign this user children who are in their caseload.

10 Select SAVE to add the new user.

5 Enter the EMAIL you would like to use for this account. It is recommended that each user have a separate email address to which he or she has easy access to. All *MyTeachingStrategies*™ communications will be sent to the user using this email, including messages about forgotten passwords.

6 PHONE is not a required field, but a phone number is useful when an administrator who does not work directly with the teacher needs their contact information.

9 Enter your password to verify your credentials. Please note this is YOUR password. You are not setting a password for the new users.

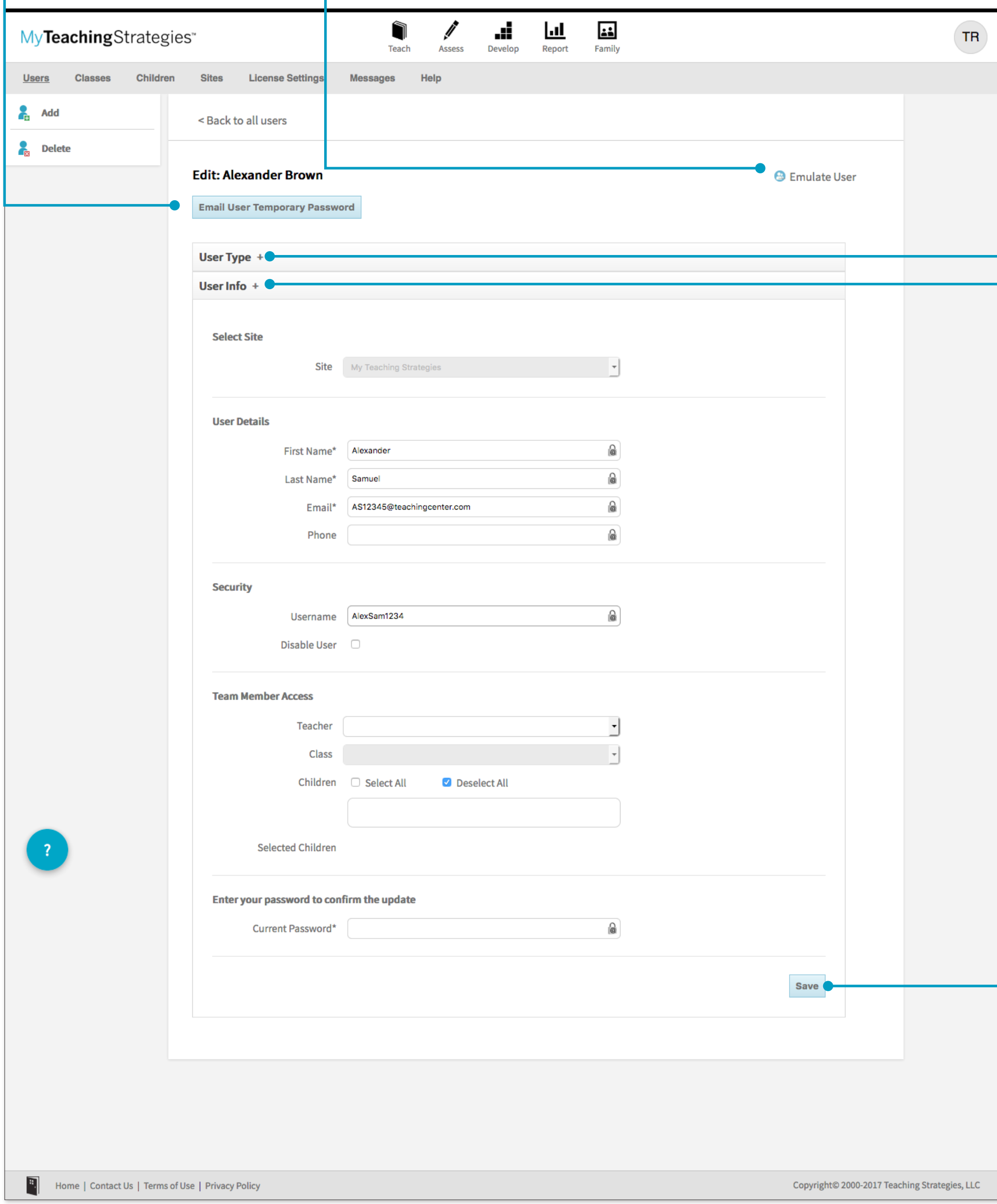
Once the new user account has been created, that user will receive an email from Teaching Strategies providing their username, a temporary password, and information on how to log in to *MyTeachingStrategies*™.

Managing User Accounts

Within a user profile, you can update user information, provide administrative access, send a user a temporary password, access *MyTeachingStrategies*™ as that user, and more. To update or manage a user account, select USERS from the sub-navigation and select the user's name from the User column.

Select EMAIL USER TEMPORARY PASSWORD to help a user reset their password.

Select EMULATE USER to access *MyTeachingStrategies*™ from this user's account perspective so you can see screens exactly as that user sees them. This will help you troubleshoot any problems. To go back to your administrator account, select the Profile Icon from the top right of your screen and select STOP EMULATING.



Expand the USER TYPE menu to update the user type, admin type, and/or organizations.

Expand the USER INFO menu to update user information including username and email address.

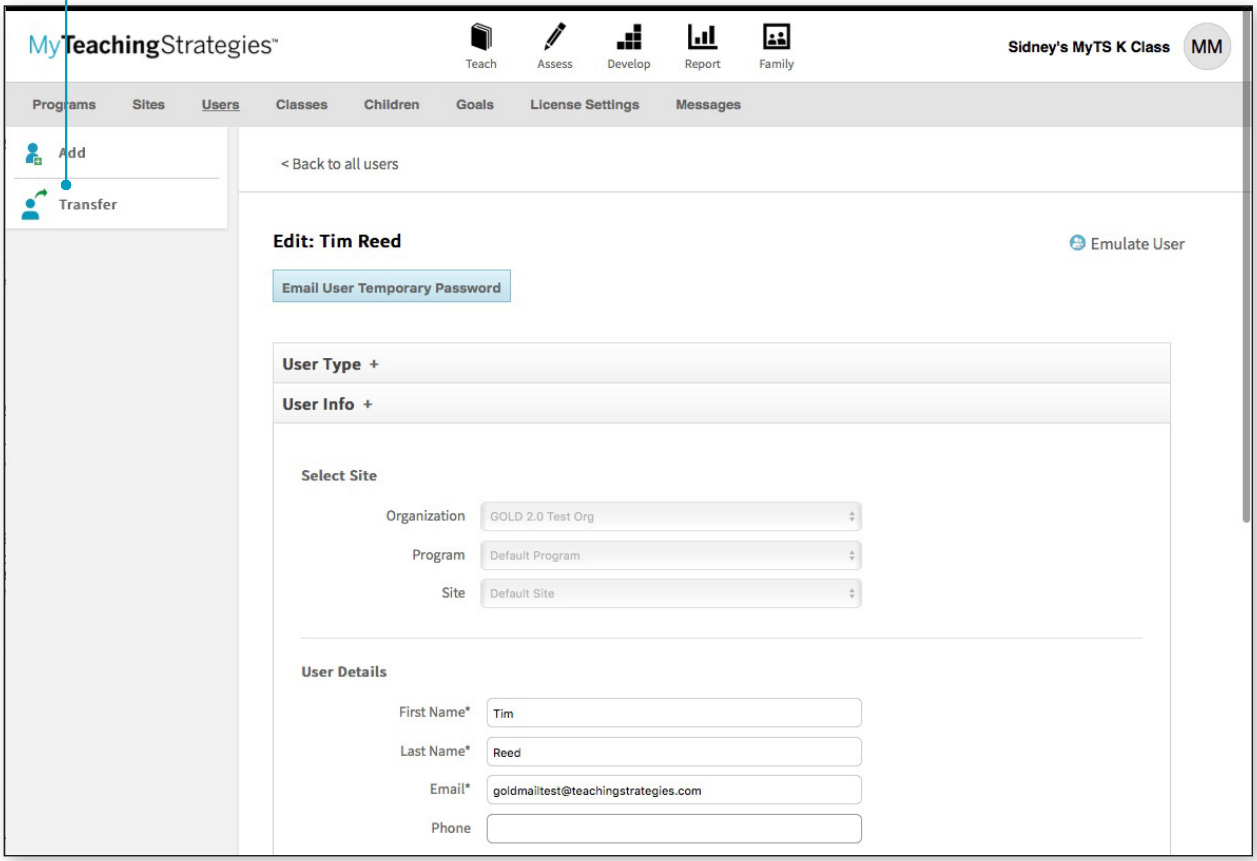
Select SAVE to save your changes.

Transfer User

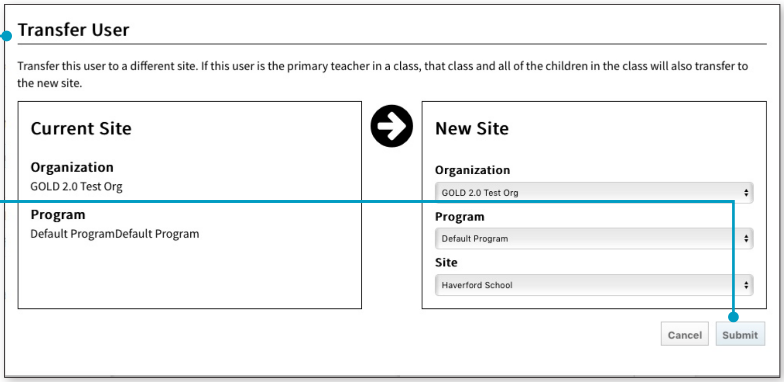
Administrators can transfer users from one site to another by selecting Users in the Administration sub-navigation.

Please note: Users will need to be removed as a co-teacher or as an assistant teacher prior to transferring the user. When transferred, any classes the user is a primary teacher for will transfer with them, along with all child records in that class.

1. Select a USER record.
2. Select TRANSFER in the left navigation.



3. The Transfer User window will appear. Select a SITE, or select a different PROGRAM and SITE to transfer the user to.
4. Select SUBMIT. User will then be transferred to the selected site.

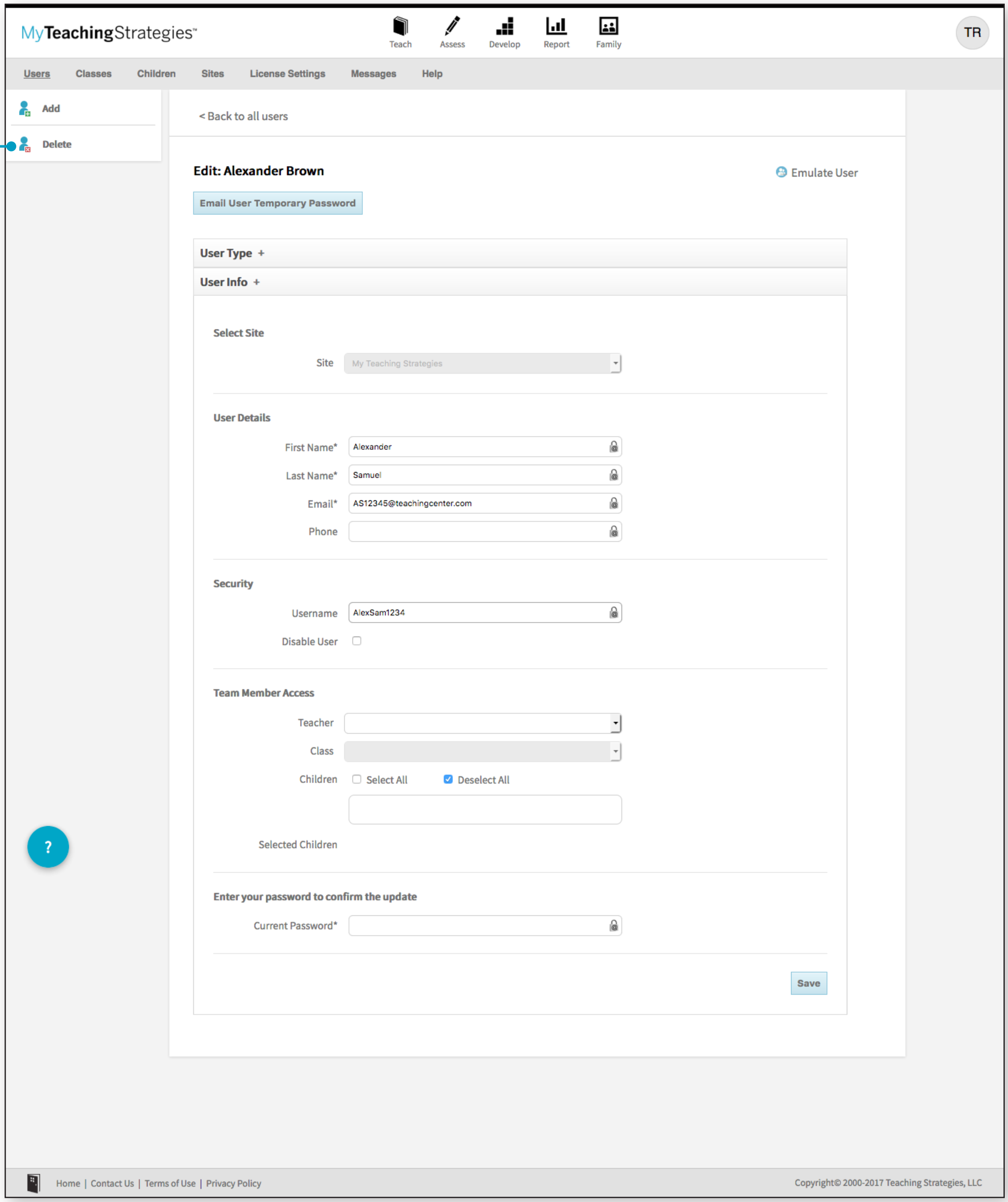


Deleting User Accounts

You can delete users if they are not associated with children or classes in *MyTeachingStrategies*™.

Before deleting a user, first reassign all children in the user's class to a different user. Then delete classes for which the user was the primary teacher.

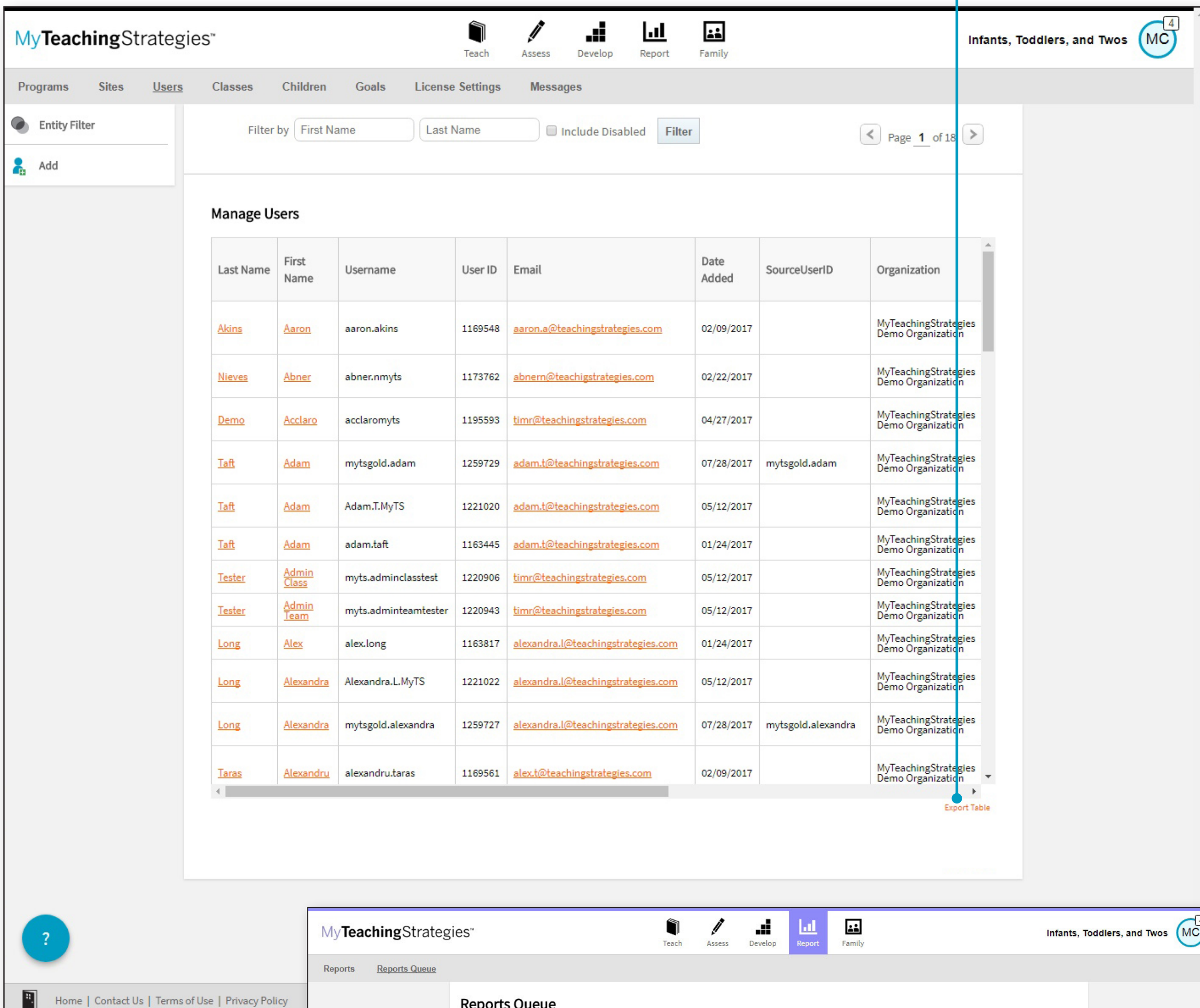
Once the user is unaffiliated with a class, select the DELETE button from the left-hand navigation to delete the user.

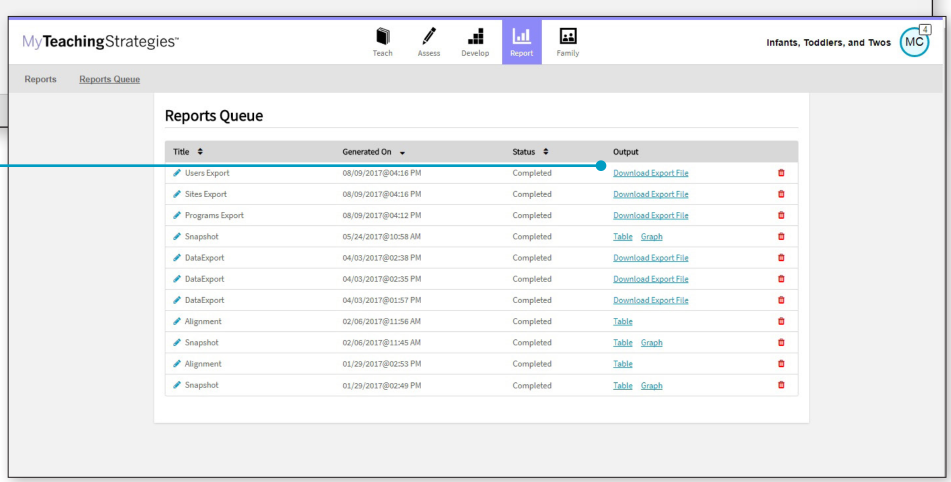


Exporting User Information

You can export all of your user information into Excel using the export table option.

1 Select EXPORT TABLE from the bottom of the user list. You will be taken to the Reports Queue, where your export will generate.



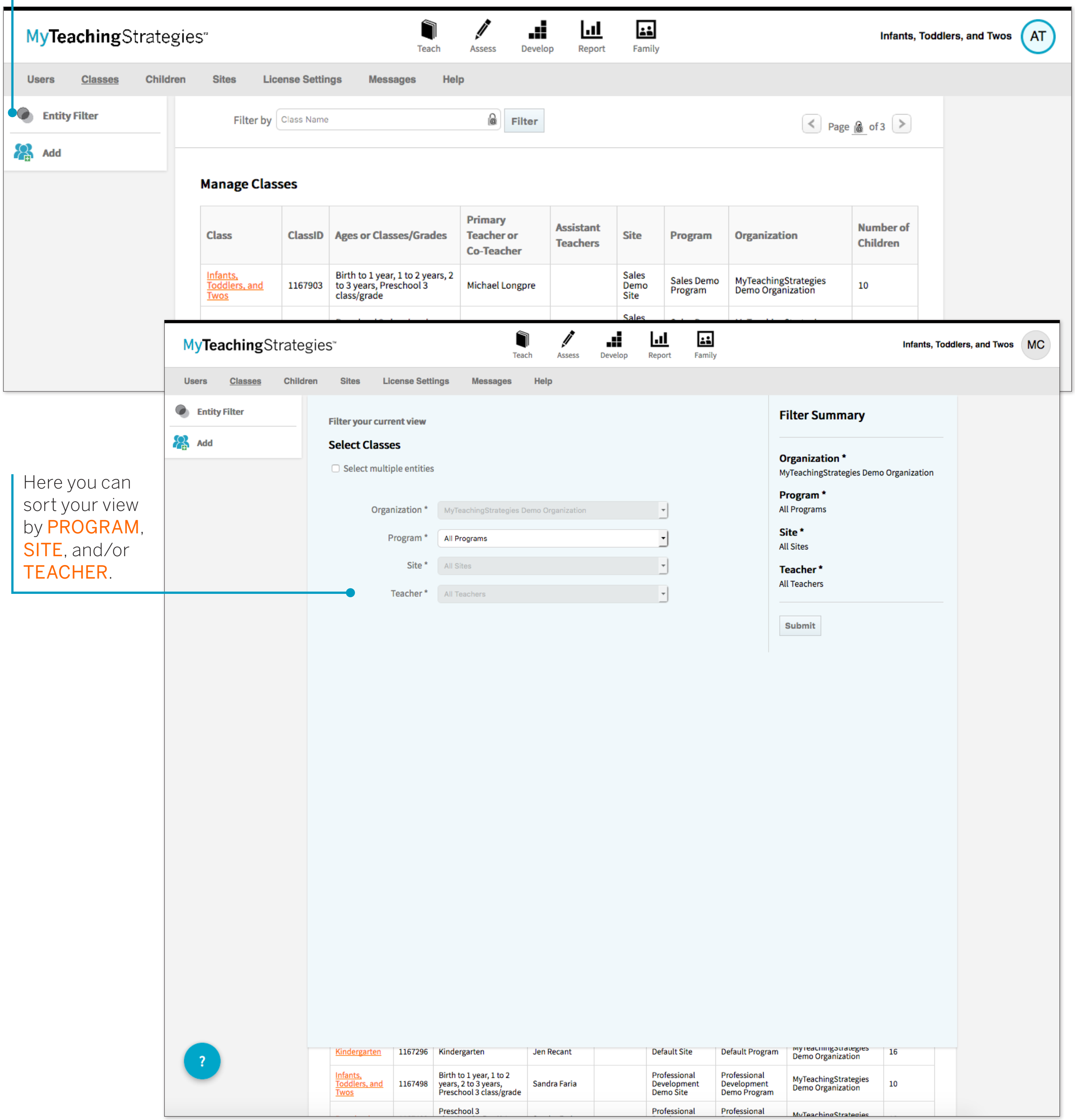


2 Select DOWNLOAD EXPORT FILE to download the Excel file.

Classes

The Classes area enables you to add classes, and manage or delete your existing classes. The main Classes screen provides an overview of your classes including the ClassID and Number of Children.

Filter the main Classes screen by selecting ENTITY FILTER from the left-hand navigation.



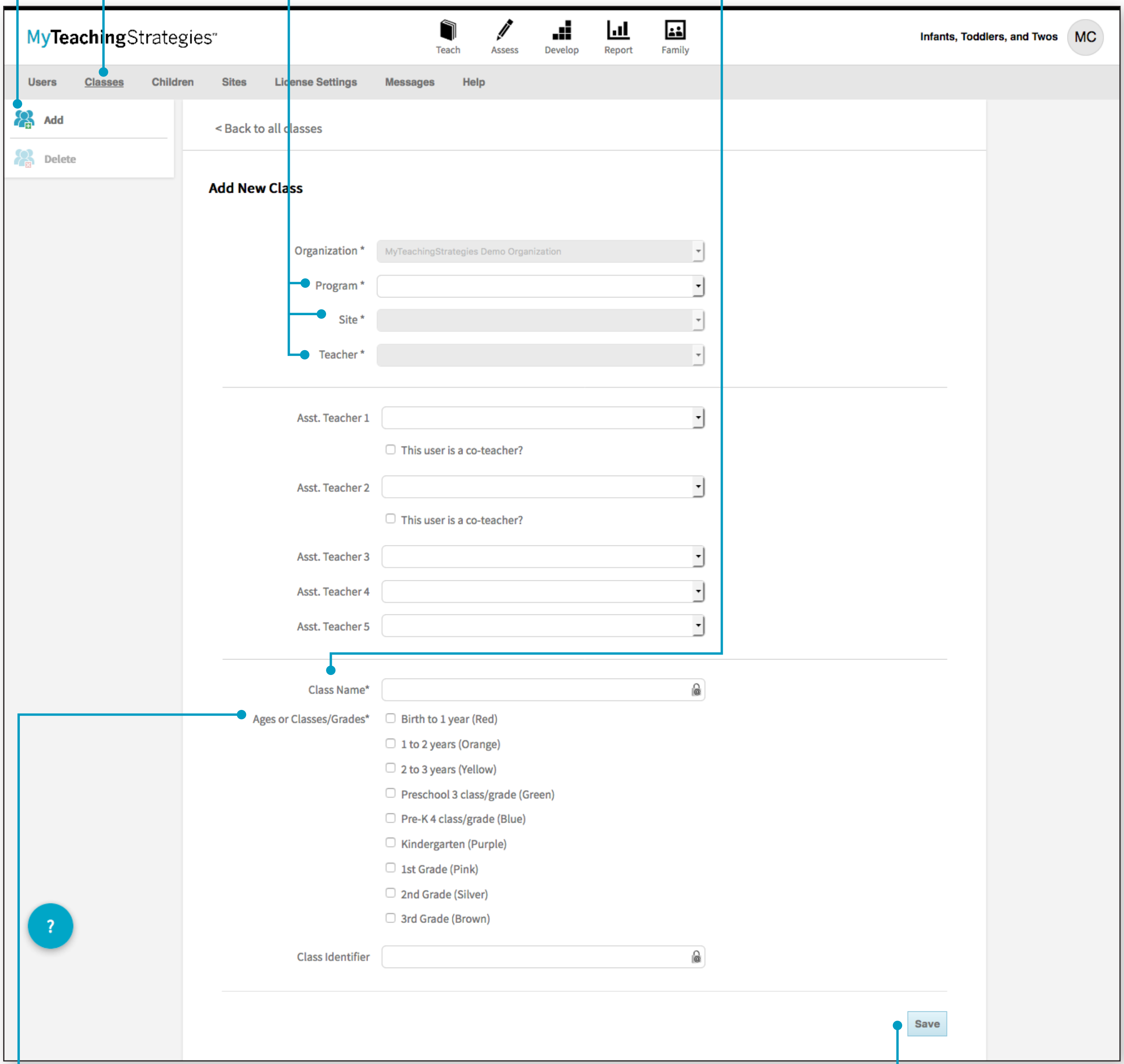
Here you can sort your view by PROGRAM, SITE, and/or TEACHER.

Adding Classes

1. To add a new class, select CLASSES from the sub-navigation and select ADD from the left-hand navigation.

2. Select the PROGRAM, SITE, and TEACHER for which the class is to be set up.

3. Enter a CLASS NAME that is appropriate for reporting purposes.



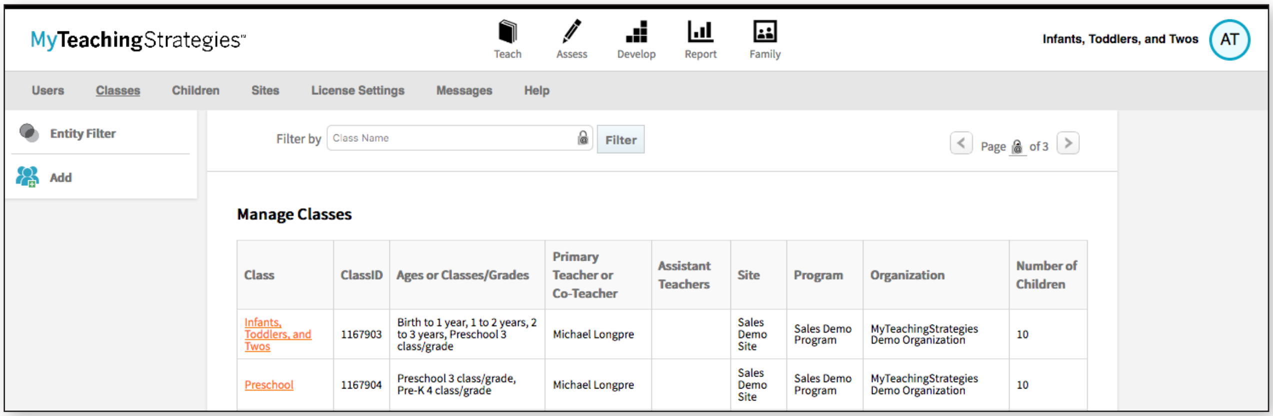
4. Then select the appropriate age or classes/grades that applies to your class. If adding a mixed-age class, base your selection(s) to include the ages or grades in that class.

Placement in infants, toddlers, and twos classes depends on the child's birth date. Preschool, Pre-K, Kindergarten, 1st Grade, 2nd Grade, and 3rd Grade classes are identified according to the curriculum you are teaching rather than the children's ages.

5. Select SAVE to add the new class.

Managing Classes

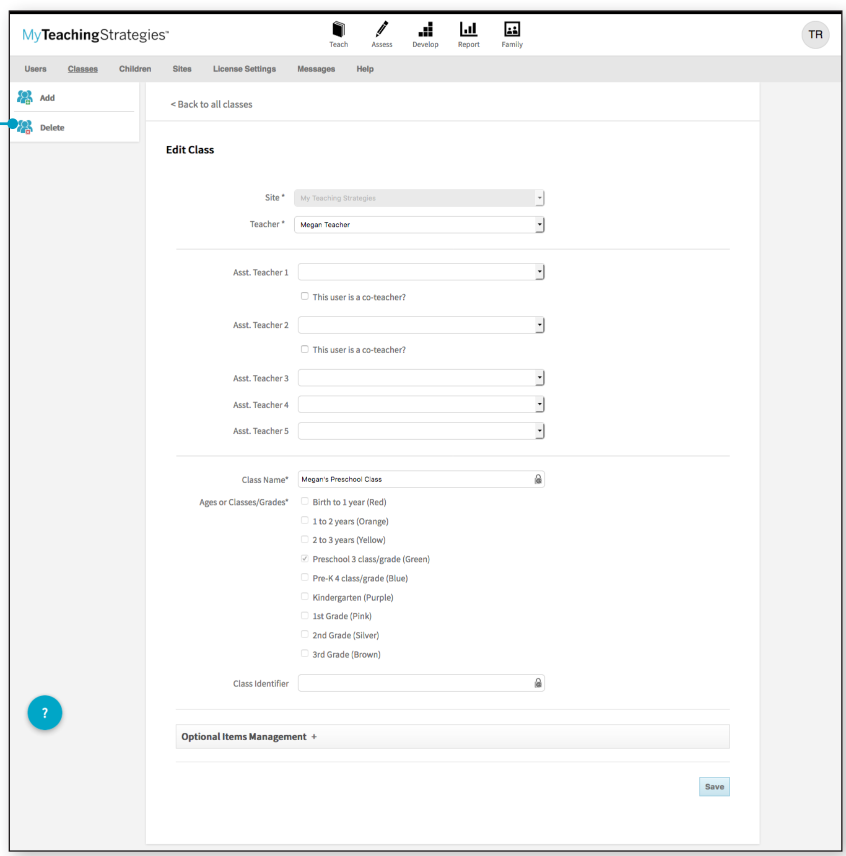
Within a class profile, you can update class information, change the primary teacher, assign co-teachers, and more. To edit information for an existing class, select the class name from the main Classes screen.



Deleting Classes

You can delete empty classes not associated with any children in *MyTeachingStrategies*™. Before deleting a class, first reassign all children in the class to a different class.

Once the class is unaffiliated with any children, select the DELETE button from the left-hand navigation to delete the class.



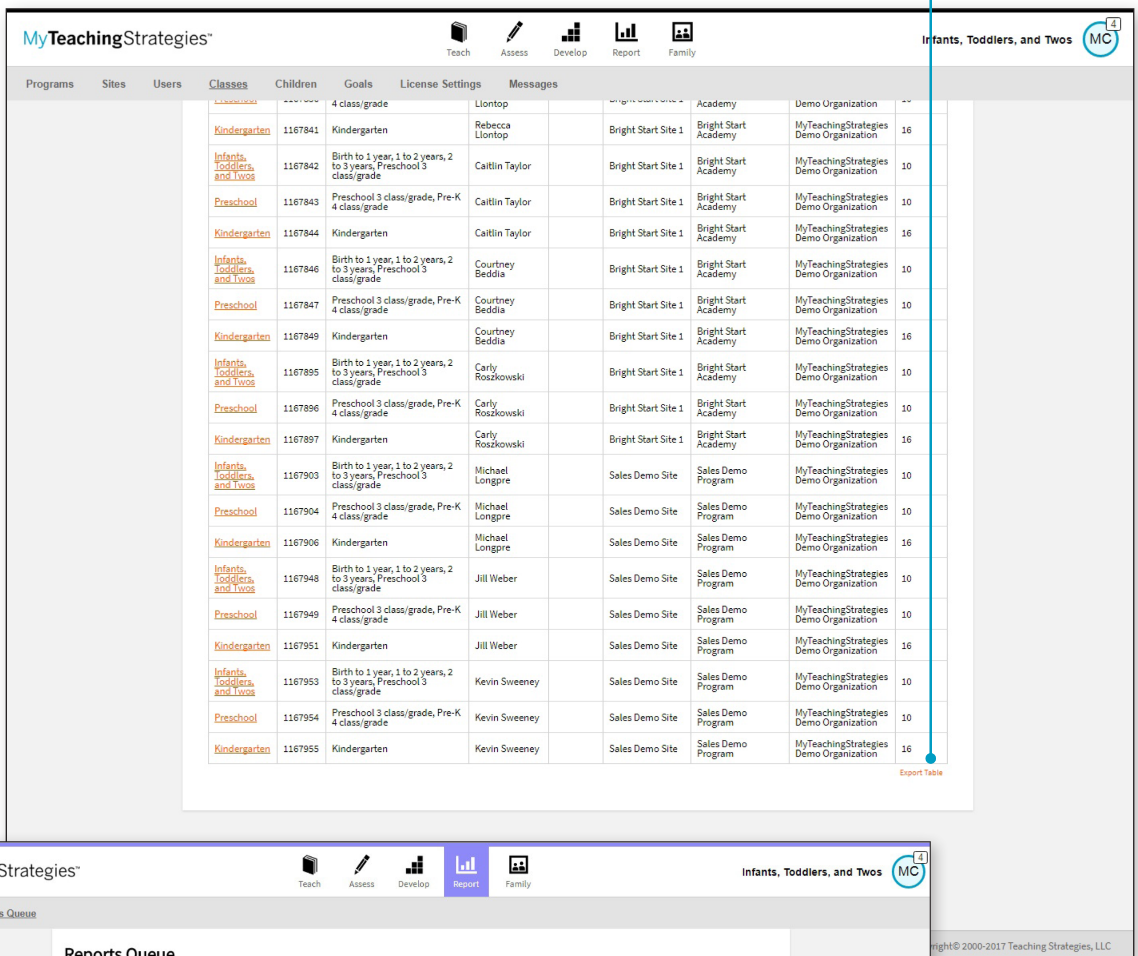
Archiving vs. Deleting

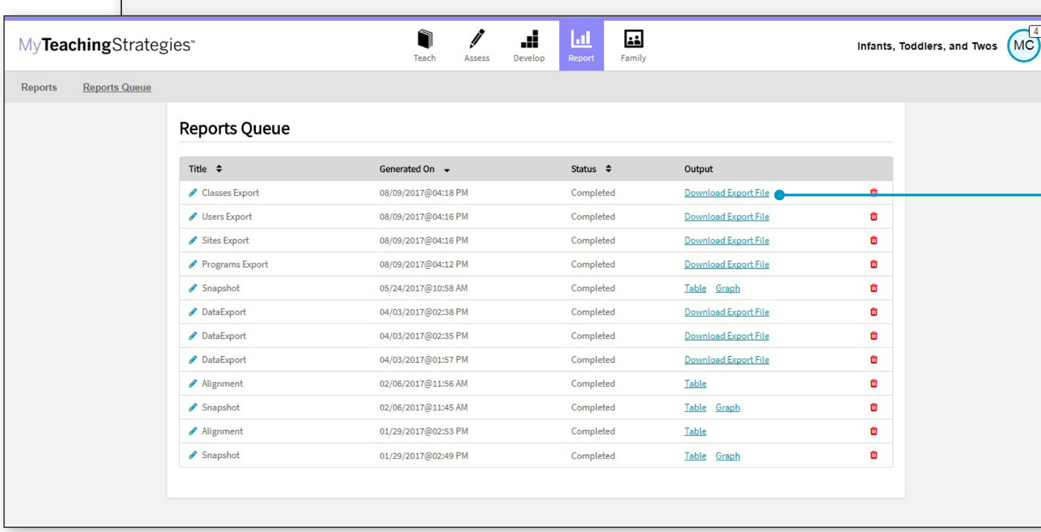
Archiving children's files allows you to store and reactivate the data at any time. Additionally, many administrative reports can include archived files. Records may be deleted if children are permanently leaving your organization and you do not wish to retain their data. If there is a possibility of a child returning to your organization, or if you wish to report on this year's data in the future, you may want to archive his or her file instead of deleting it.

Exporting Class Information

You can export all of your class information into Excel using the export table option.

1 Select EXPORT TABLE from the bottom of the class list. You will be taken to the Reports Queue, where your export will generate.

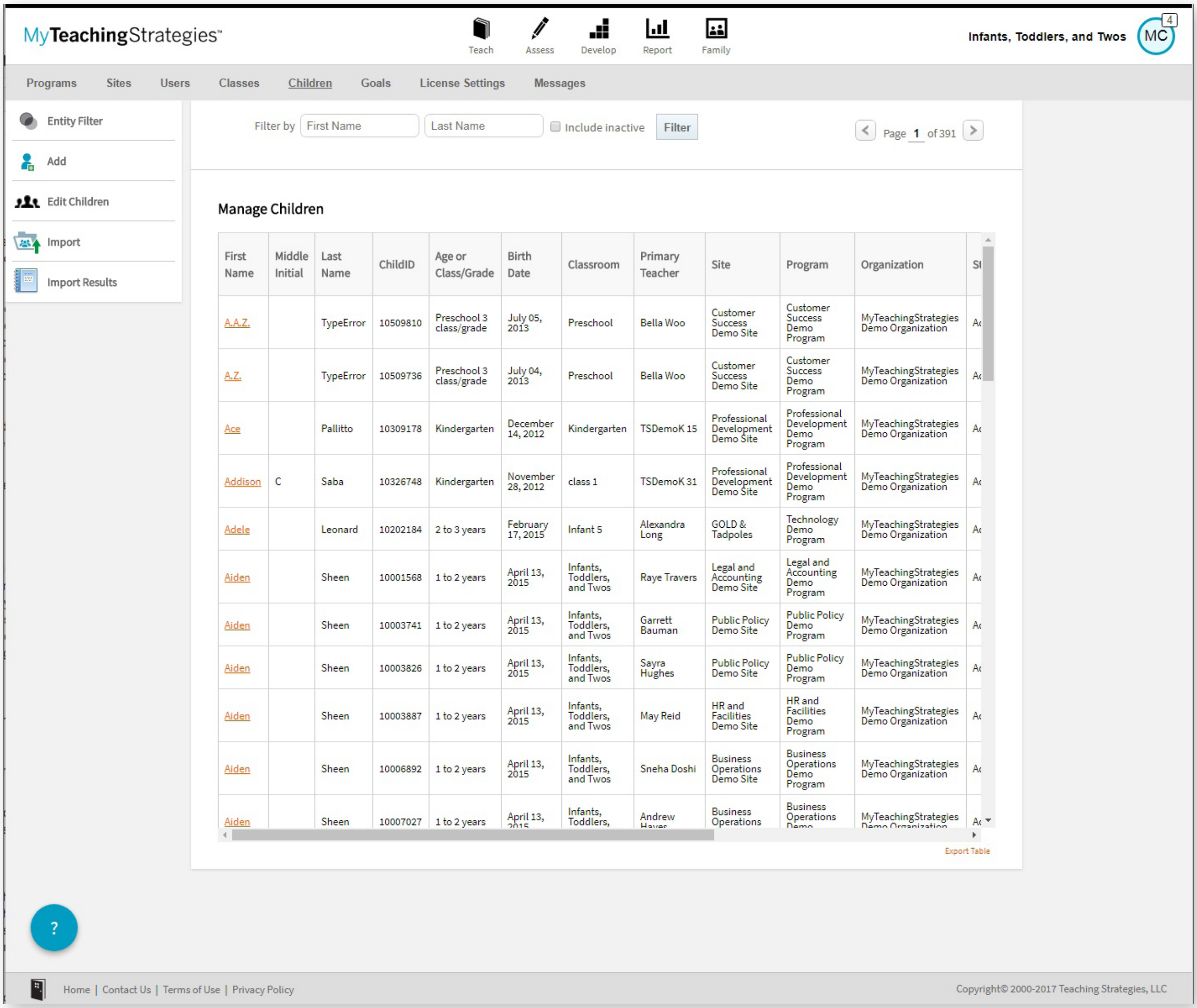




2 Select DOWNLOAD EXPORT FILE to download the Excel file.

Children

The Children area enables you to add new children, and manage, transfer, archive, or delete your existing child records. The main Children screen provides an overview of the children in your organization, program, or site.

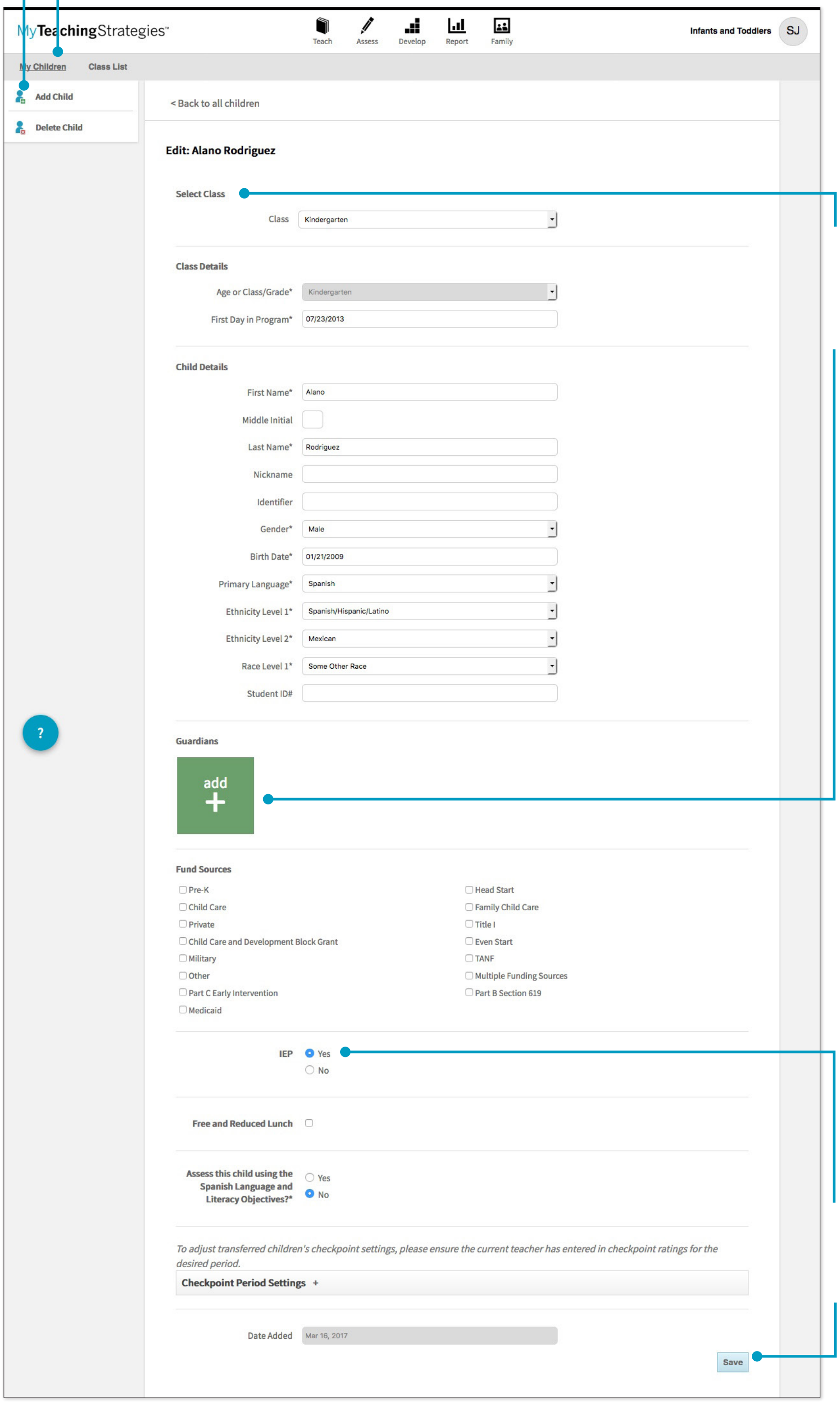


Adding Children

There are two ways to add new children to your organization, program, or site: Manual Add or Import.

Manual Add

1. To add a child manually, select MY CHILDREN from the sub-navigation and select ADD from the left-hand navigation.



2. Expand the SELECT CLASS menu to choose the PROGRAM, SITE, TEACHER, and CLASS to add the child to.

3. Select ADD+ to add a family member to the child's profile. The family member can now set up an account at family.teachingstrategies.com using the email address provided to access documentation shared by you or your teachers.

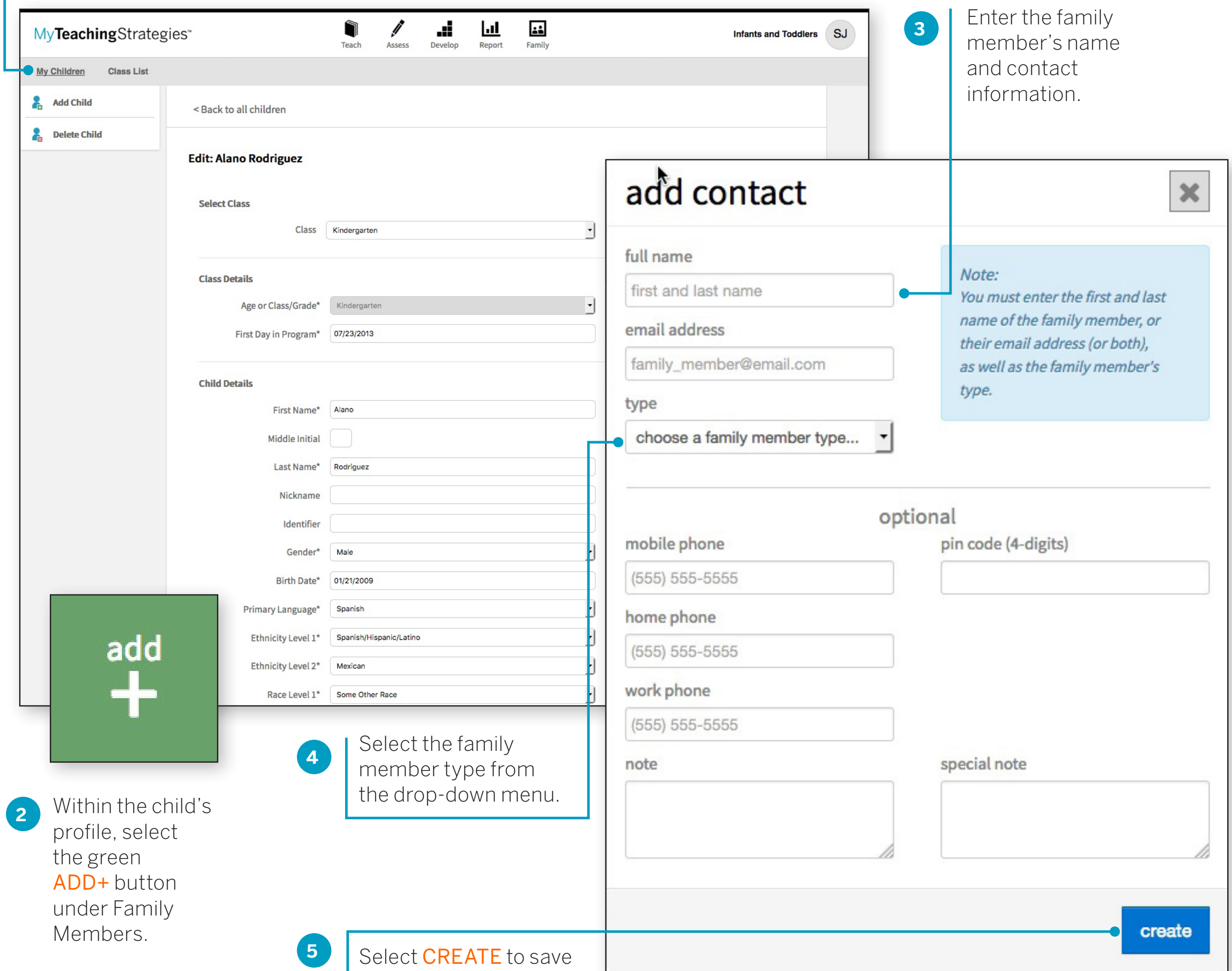
4. If the child has an IEP, select YES next to IEP.

5. Add additional child information and select SAVE to add the new child.

Adding a Family Member

You can add family members to a child's profile. Adding a family member will give you easy access to their contact information through the child's profile, and allow you and your teachers to share documentation, lesson plans, and more!

1. To add a family member, select ADMINISTRATION from your Settings menu, select CHILDREN from the sub-navigation, and open a child's profile by selecting a child's name from the list.



2. Within the child's profile, select the green ADD+ button under Family Members.

3. Enter the family member's name and contact information.

4. Select the family member type from the drop-down menu.

5. Select CREATE to save the family member to the child's profile.

The family member will then be able to set up their account by visiting family.teachingstrategies.com and entering their email address. They will then receive a pin number from Teaching Strategies via email to verify their account. Once verified, the family member will be able to access their *MyTeachingStrategies*™ Family account where they will have access to any shared information.

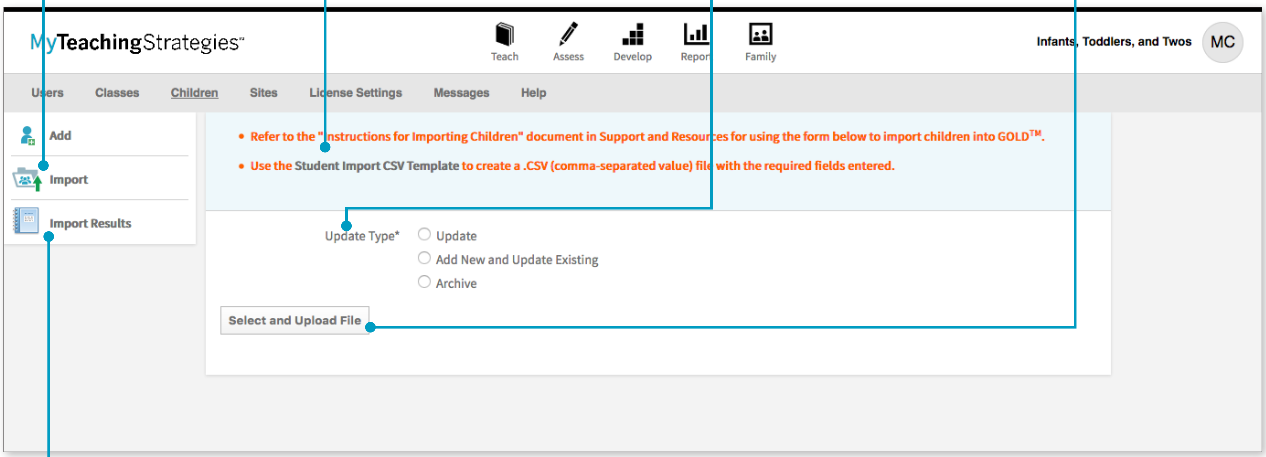
Import Children

1. To import new children, select IMPORT from the left-hand navigation.

2. Select STUDENT IMPORT CSV TEMPLATE to download a template for your child data. Once you've added the required fields to the template, save the file as a .CSV (comma-separated values) file.

3. Use the UPDATE TYPE area to indicate whether you are updating existing records, adding new records and updating existing records, or archiving records.

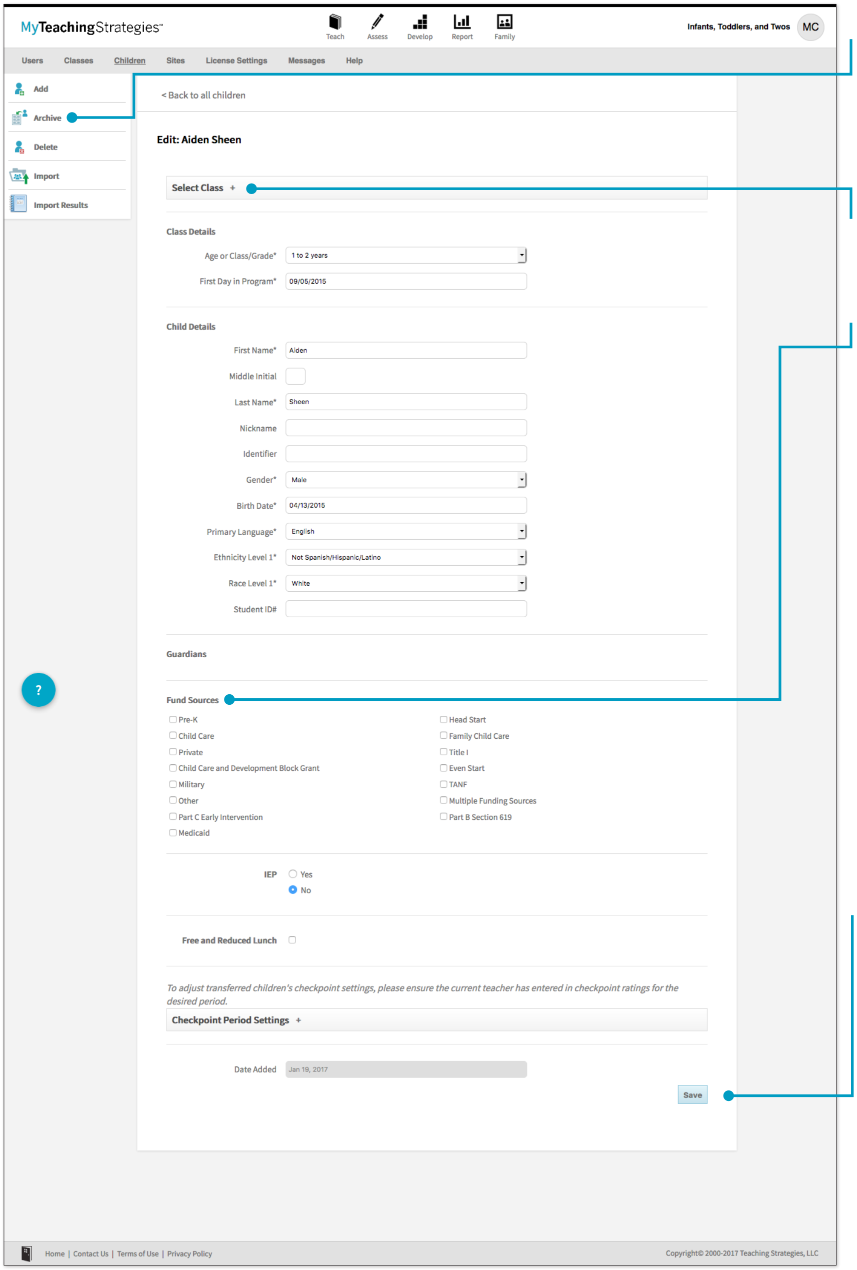
4. Select SELECT AND UPLOAD FILE to upload your list.



5. Select IMPORT RESULTS from the left-hand navigation to see information on your past imports.

Managing Children

Within a child profile, you can update child information, transfer, archive, or delete a child record, and more. To edit information for an existing child, select the child's name from the main Children screen.



Select ARCHIVE from the left-hand navigation to archive a child who is no longer in the program.

To transfer a child to another class, expand the SELECT CLASS menu, and select a new teacher and/or class.

Use the FUND SOURCES area to update the child's funding source(s).

To update demographic information tied to previous checkpoint periods, expand the CHECKPOINT PERIOD SETTINGS option, make any needed changes to colored bands, funding sources, and additional objectives/dimensions associated with the child for a specific checkpoint period, then select SAVE.

Editing Multiple Child Records at Once

You can edit multiple child records at once, including transferring child records to different classrooms, reactivating archived or deleted child records, archiving active or deleted child records, or deleting active or archived child records.

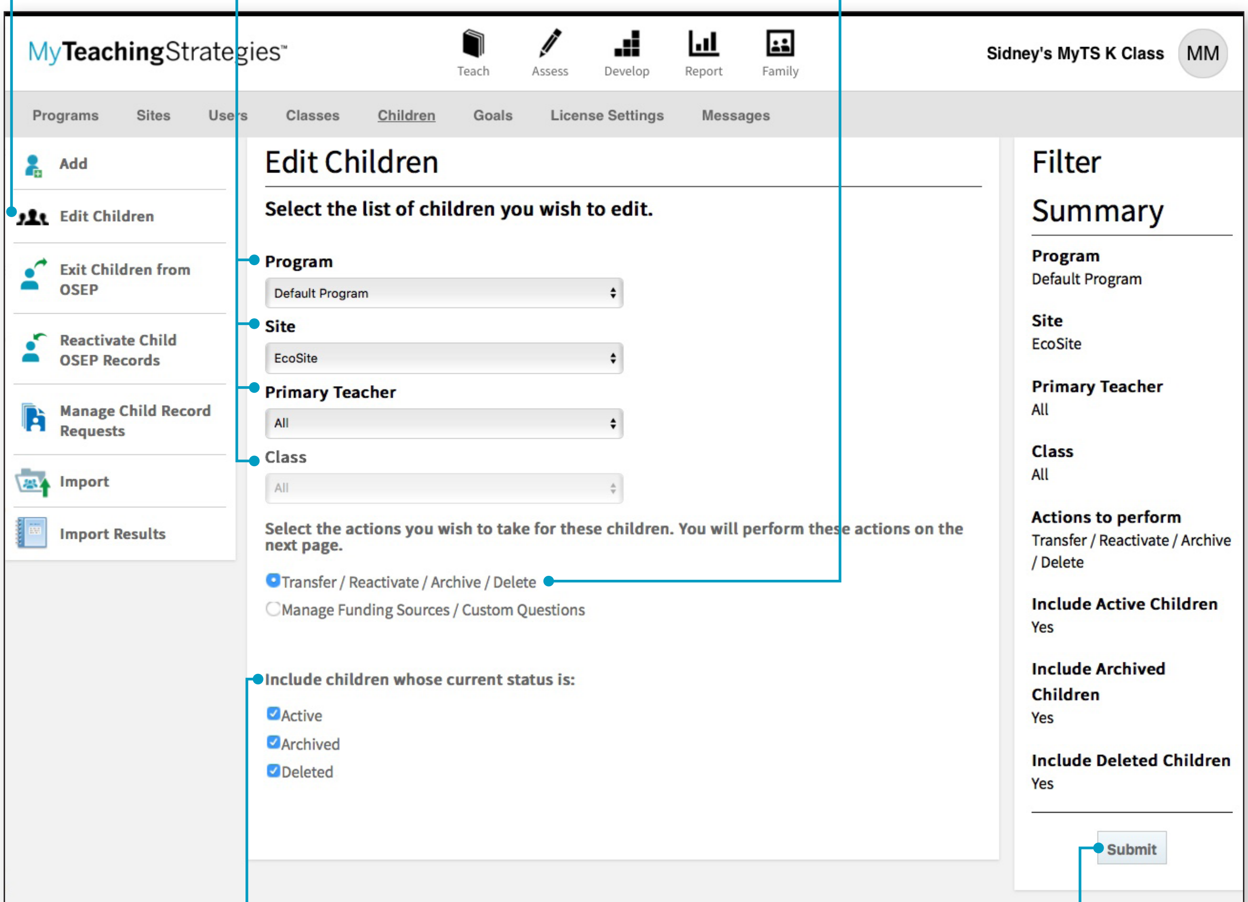
To edit child records, select CHILDREN from the Administration sub-navigation.

Transfer / Reactivate / Archive / Delete

1. Select EDIT CHILDREN from the left-hand navigation.

2. Select a PROGRAM and a SITE. You also have the option to select a TEACHER and/or a CLASS.

3. Select TRANSFER / REACTIVATE / ARCHIVE / DELETE.



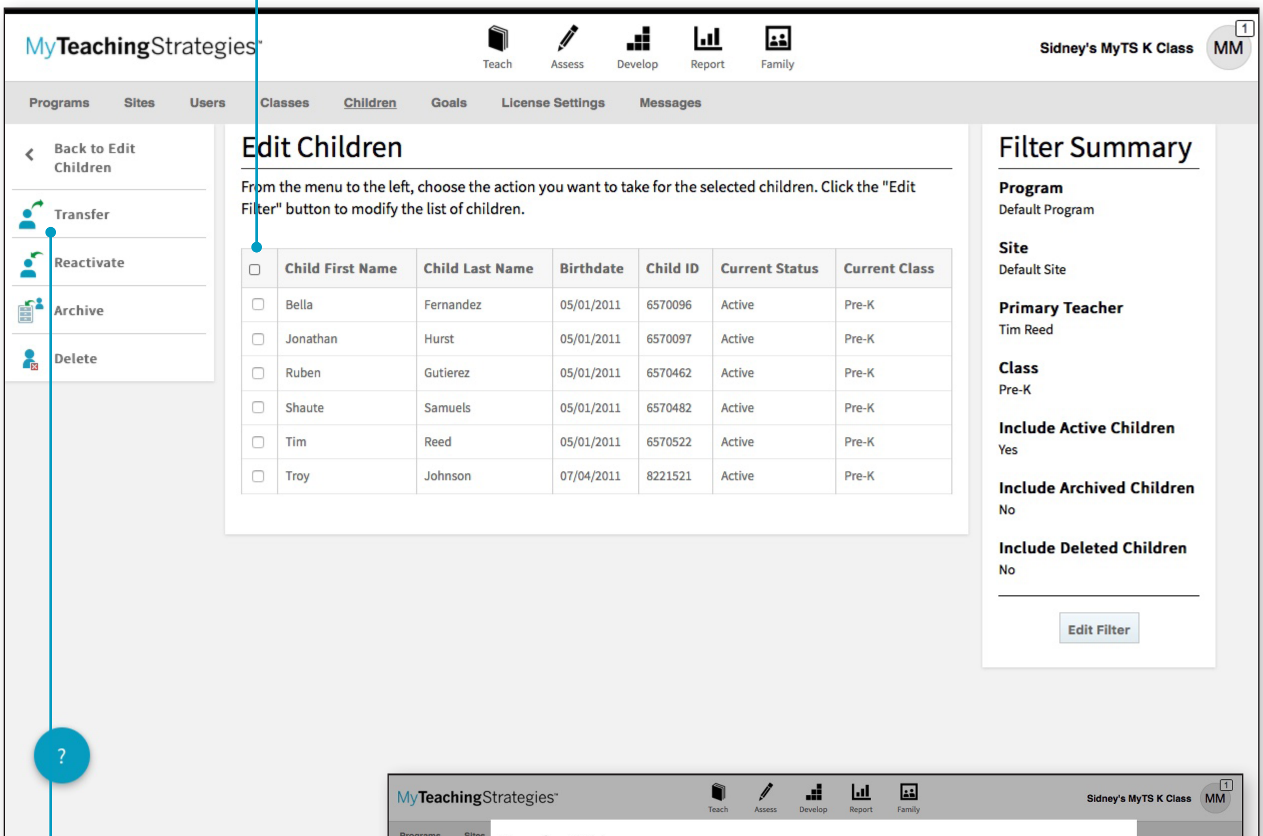
4. Select the checkbox(es) next to ACTIVE, ARCHIVED, and/or DELETED to include these types of child records.

5. Select SUBMIT.

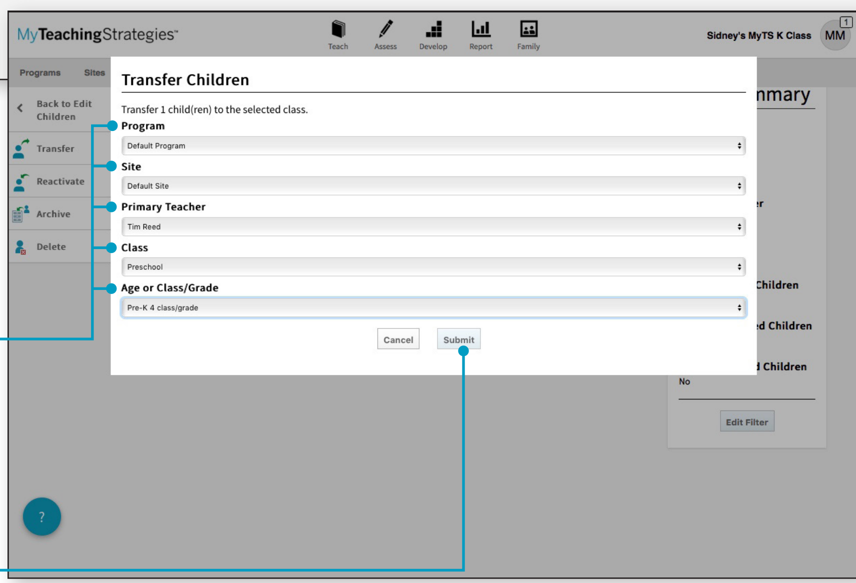
A list of child records will appear in a table with several columns displaying demographic information.

To Transfer

1. Select the child records (or all child records) to transfer.



2. Select the TRANSFER option in the left-hand navigation.

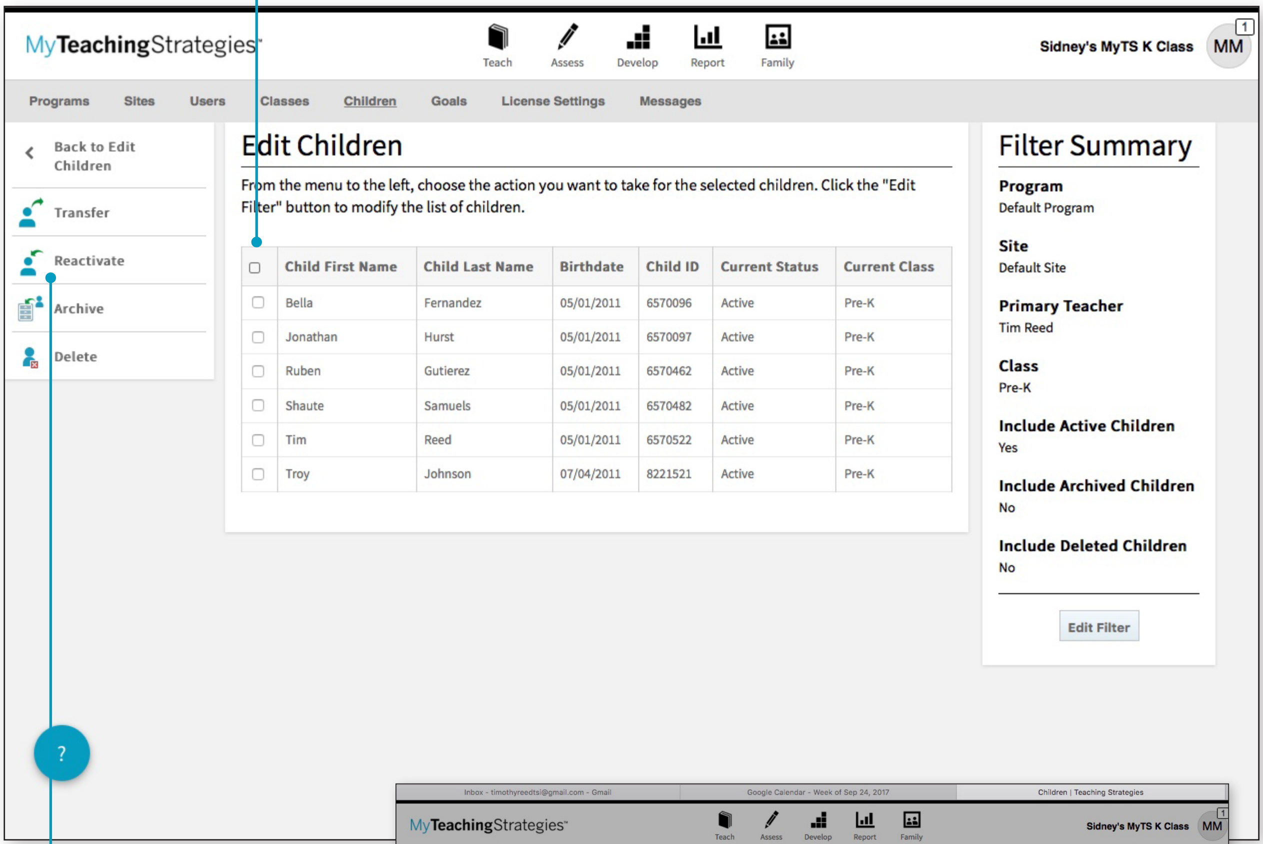


3. A pop-up box will appear where you can choose the PROGRAM, SITE, PRIMARY TEACHER, and then the CLASS the child or children are transferring to. Verify the colored band the child or children will be on.

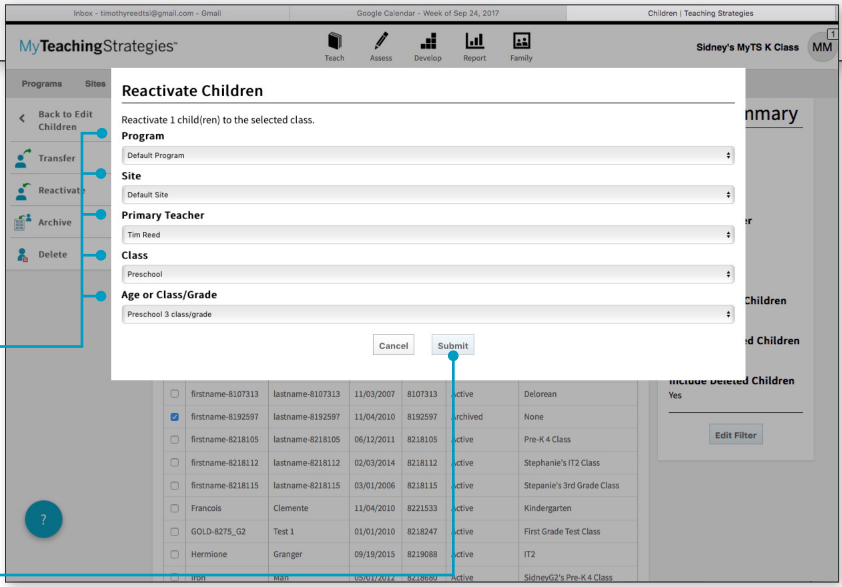
4. Select SUBMIT.

To Reactivate

1. Select the child records (or all child records) to transfer.



2. Select the REACTIVATE option in the left-hand navigation.

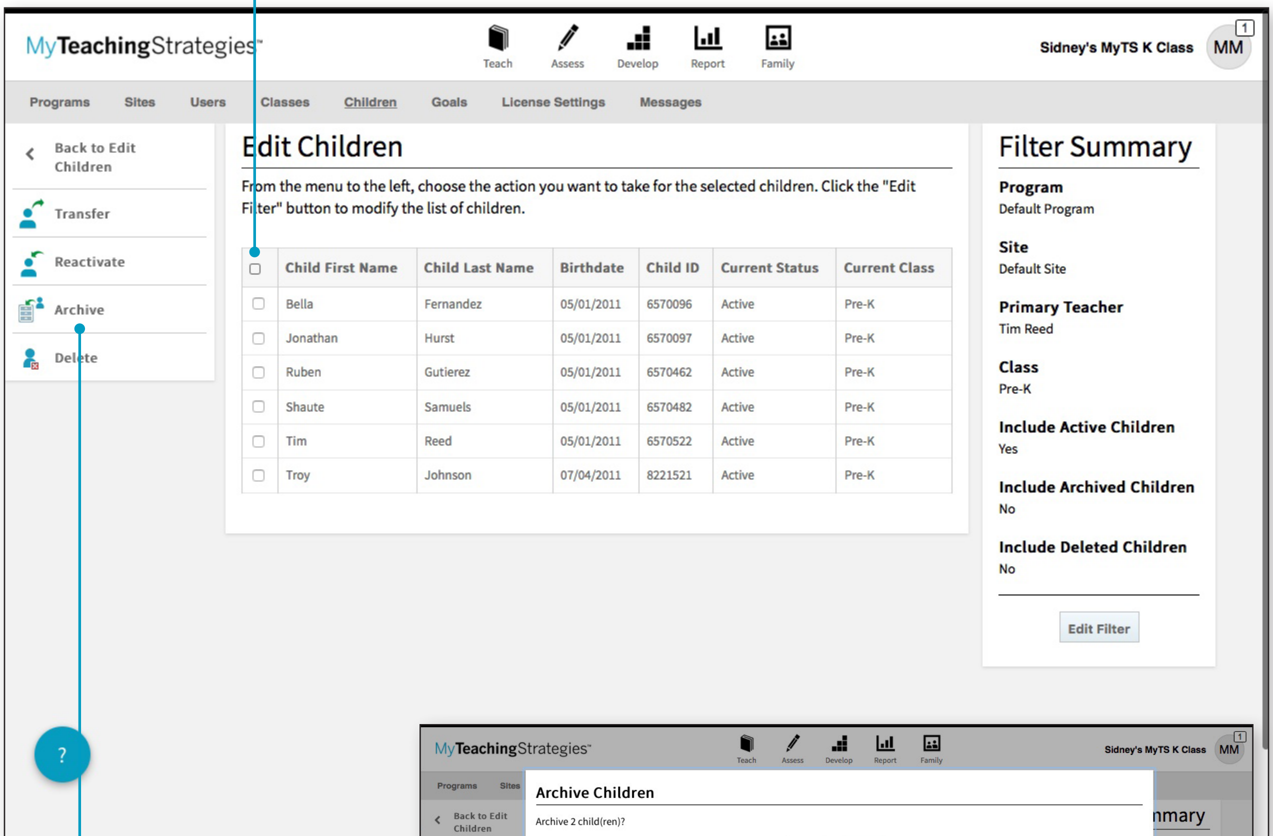


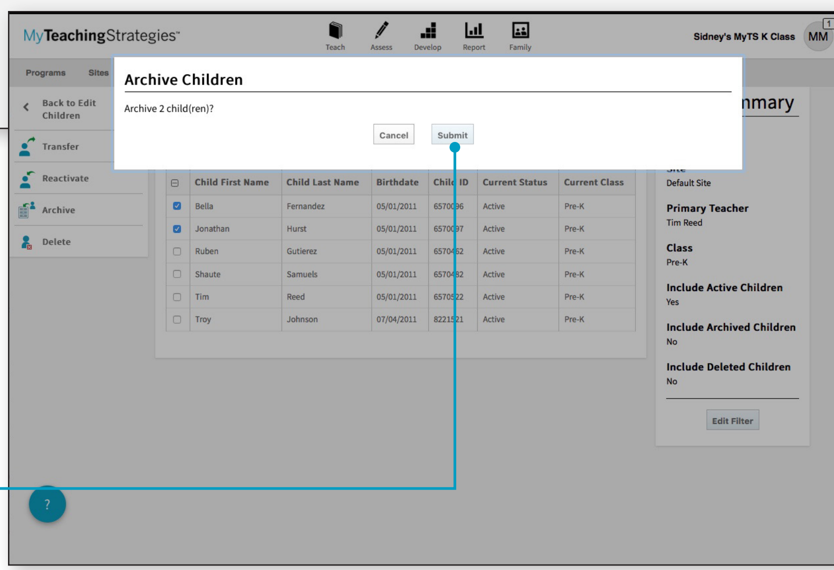
3. A pop-up box will appear where you can choose the PROGRAM, SITE, PRIMARY TEACHER, and then the CLASS the child or children are transferring to. Verify the colored band the child or children will be on.

4. Select SUBMIT.

To Archive

1. Select a child record or all child records to archive.



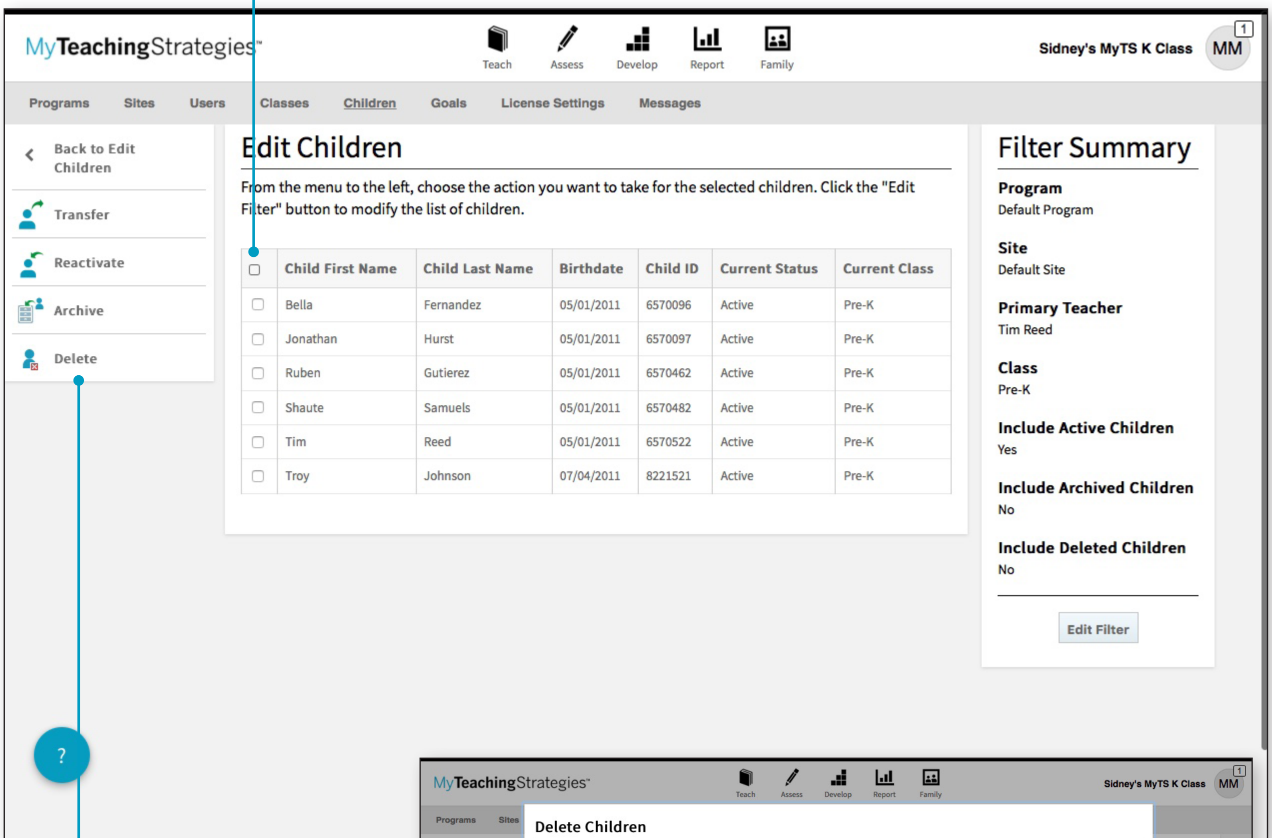


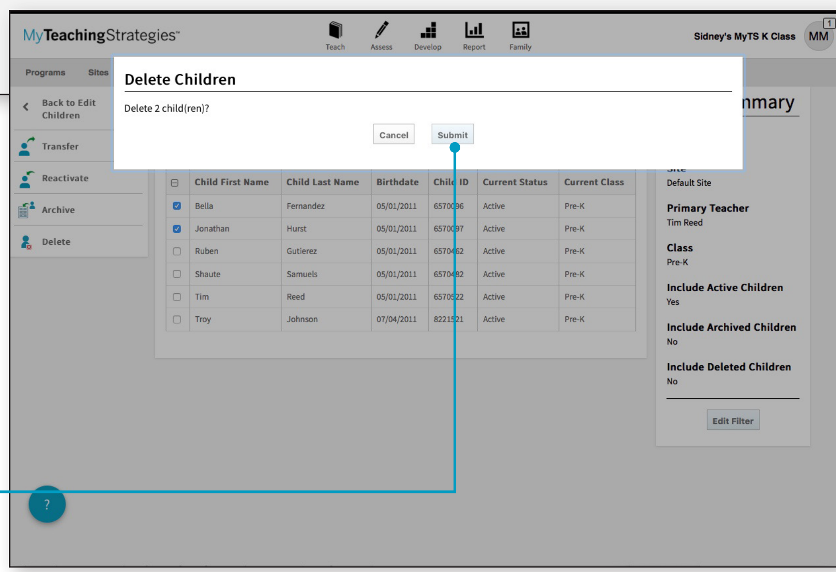
2. Select the ARCHIVE option in the left-hand navigation.

3. A pop-up box will appear where you verify your decision to archive. Select SUBMIT.

To Delete

1. Select a child record or all child records to delete.





2. Select the DELETE option in the left-hand navigation.

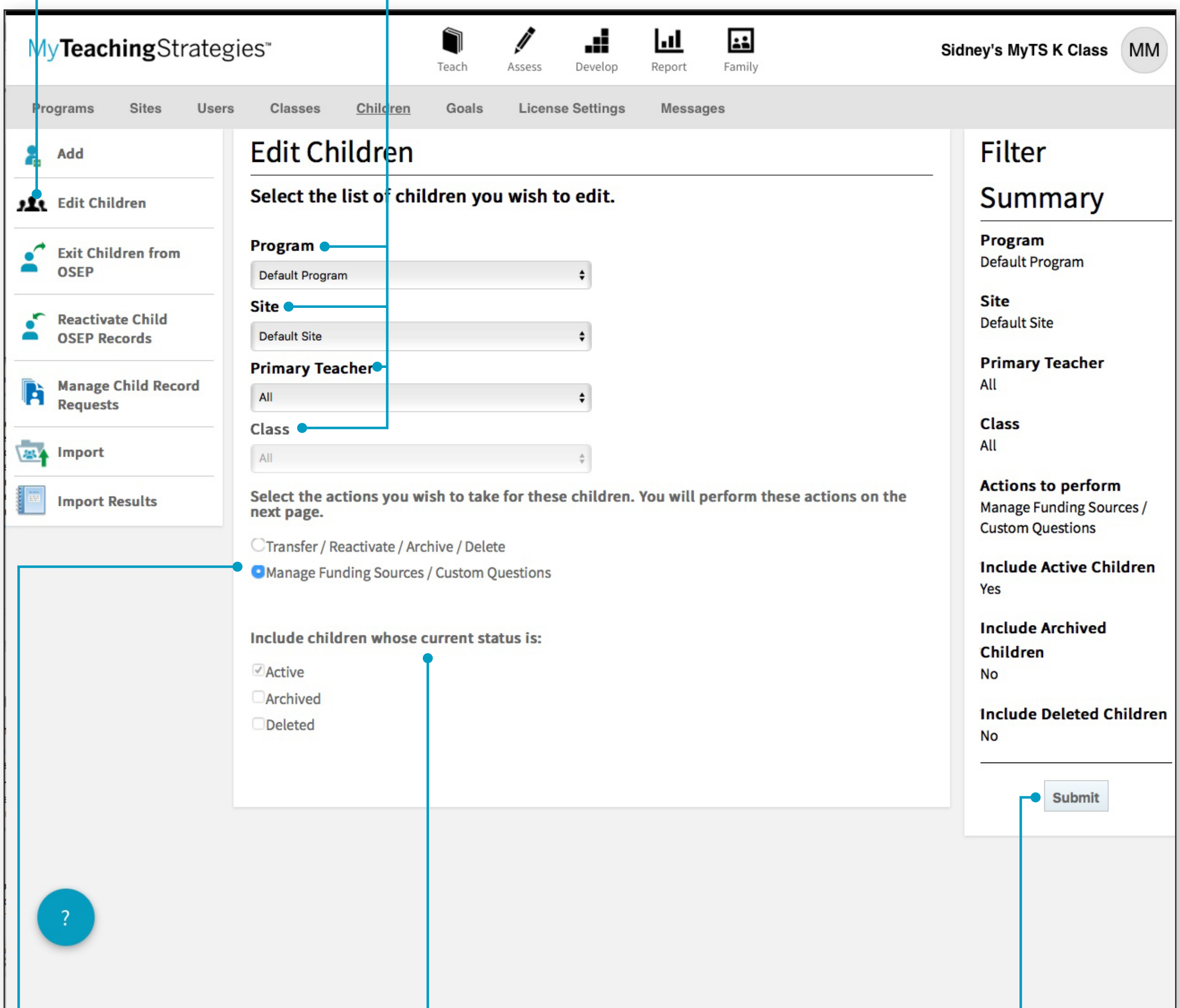
3. A pop-up box will appear where you verify your decision to archive. Select SUBMIT.

Manage Funding Sources / Custom Questions

You can manage funding sources and custom questions for child records for an entire site or classroom at one time.

1. Select EDIT CHILDREN from the left-hand navigation.

2. Select a PROGRAM and a SITE. You also have the option to select a TEACHER and/or a CLASS.



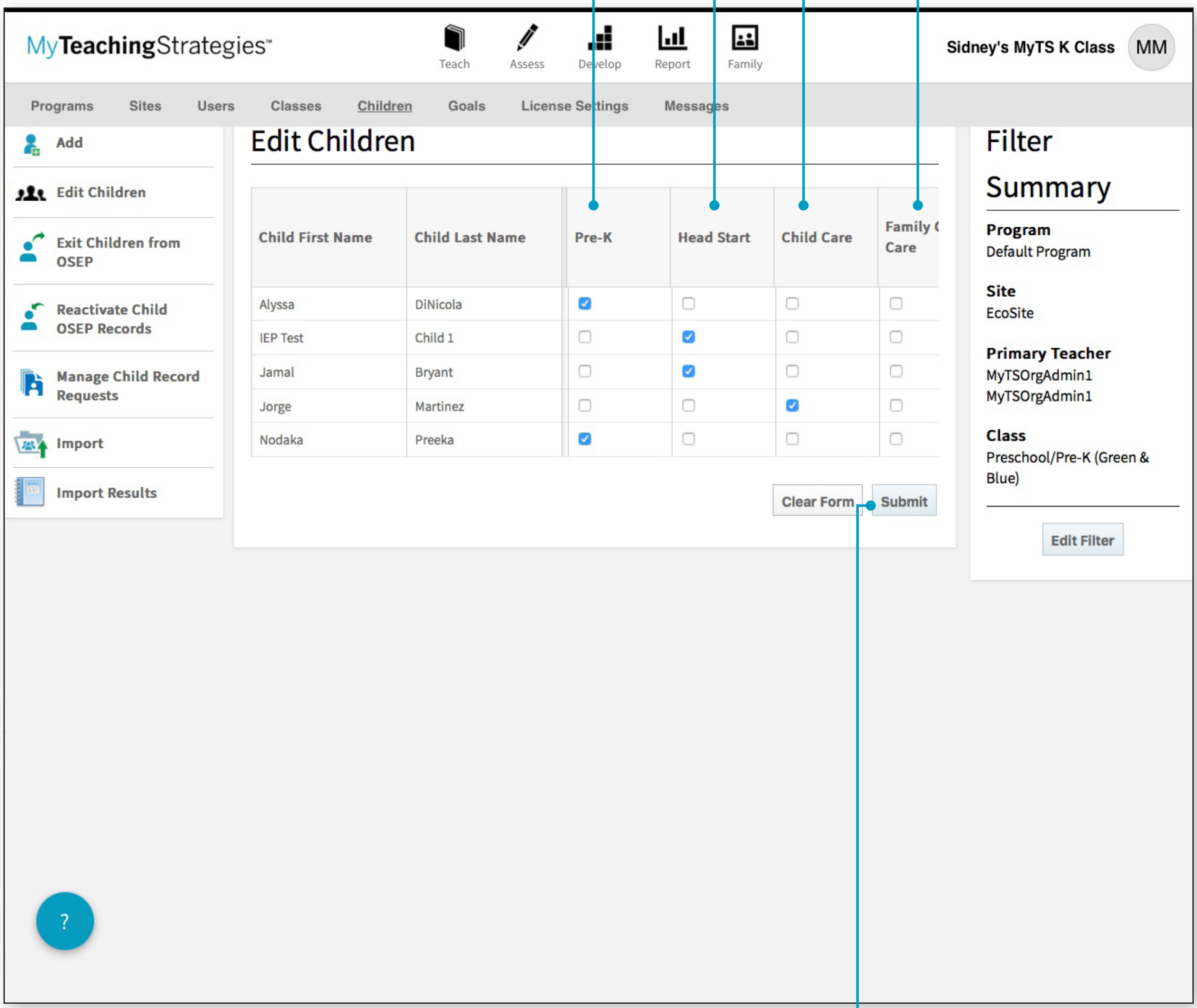
3. Select MANAGE FUNDING SOURCES / CUSTOM QUESTIONS.

4. Select the checkbox(es) next to ACTIVE, ARCHIVED, and/or DELETED to include these types of child records.

5. Select SUBMIT.

A list of child records will appear in a table with several columns displaying the birthdate, current class, and the various funding sources and custom questions available for child records.

1. Any saved funding source and custom question selections will appear checked off. Select or deselect funding sources or custom questions.

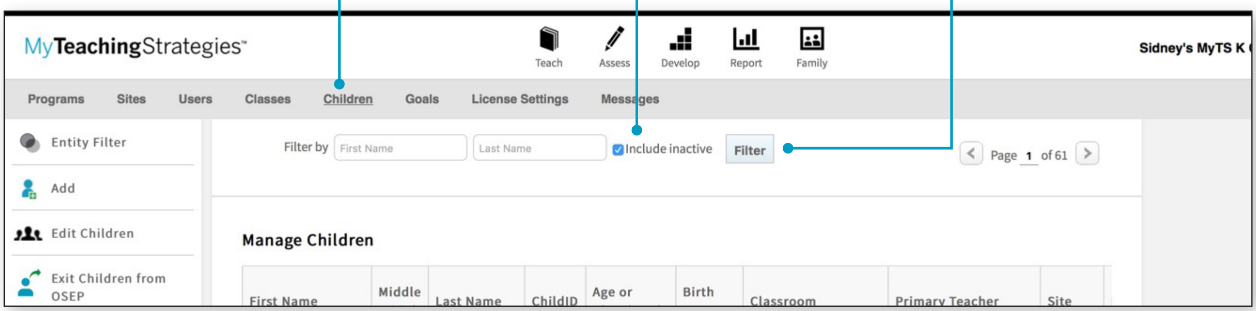


2. Select SUBMIT.

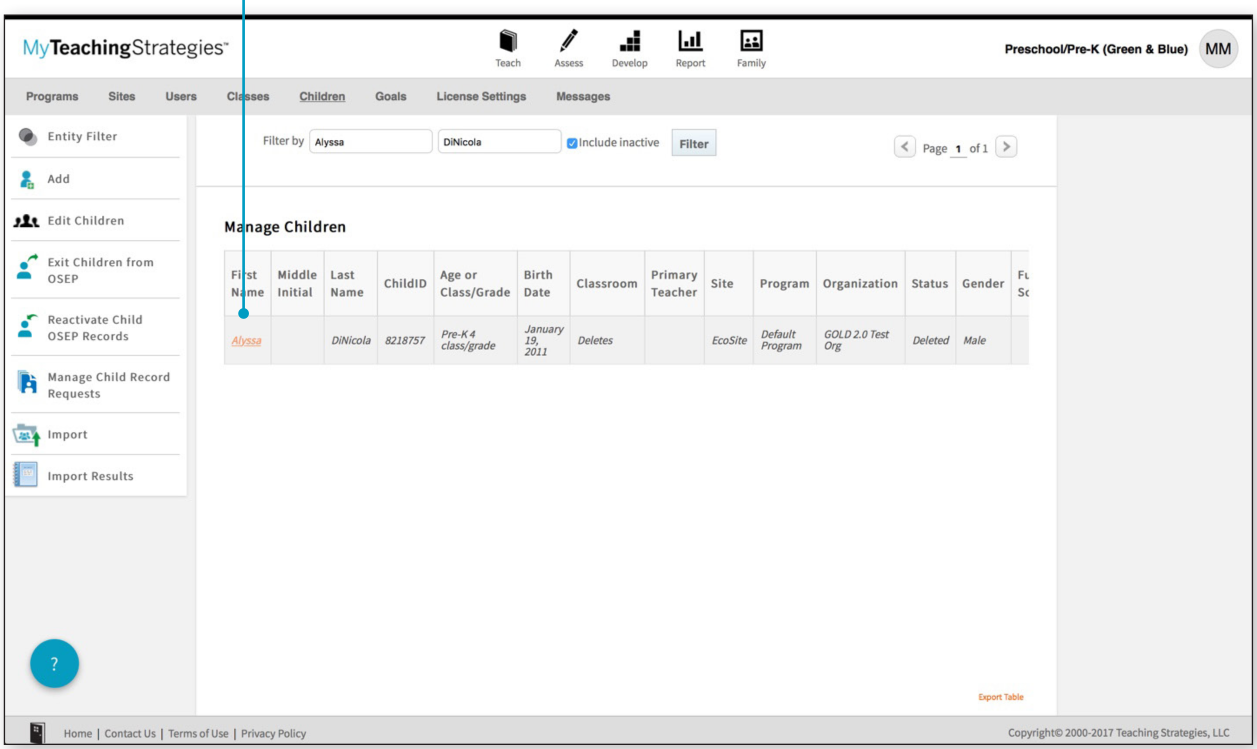
Reactivating Archived and Deleted Child Records

Administrators can reactivate any child records that have been archived or deleted either on the child record's page or by using the Edit Children feature. Below you will find how to reactivate archived or deleted child records from the child records page. For information on how to reactivate archived or deleted child records using the Edit Children feature, see the Edit Children section of this guide.

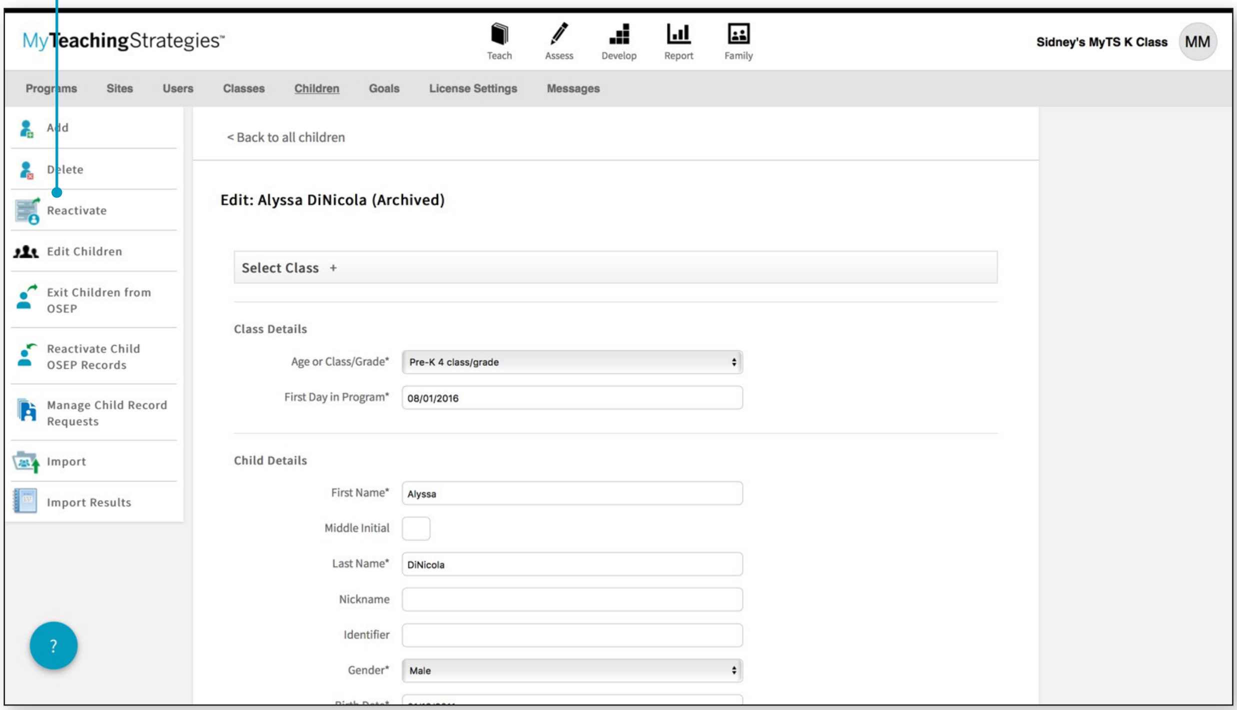
1. Select CHILDREN from the Administration sub-navigation.
2. Select the box next to INCLUDE INACTIVE to search for an archived child record.
3. Select FILTER.

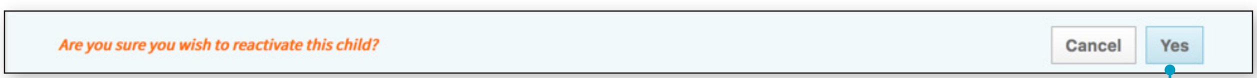


4. The filtered list of child records will appear, showing inactive child records with a gray background. Select the name of the child record you wish to reactivate.



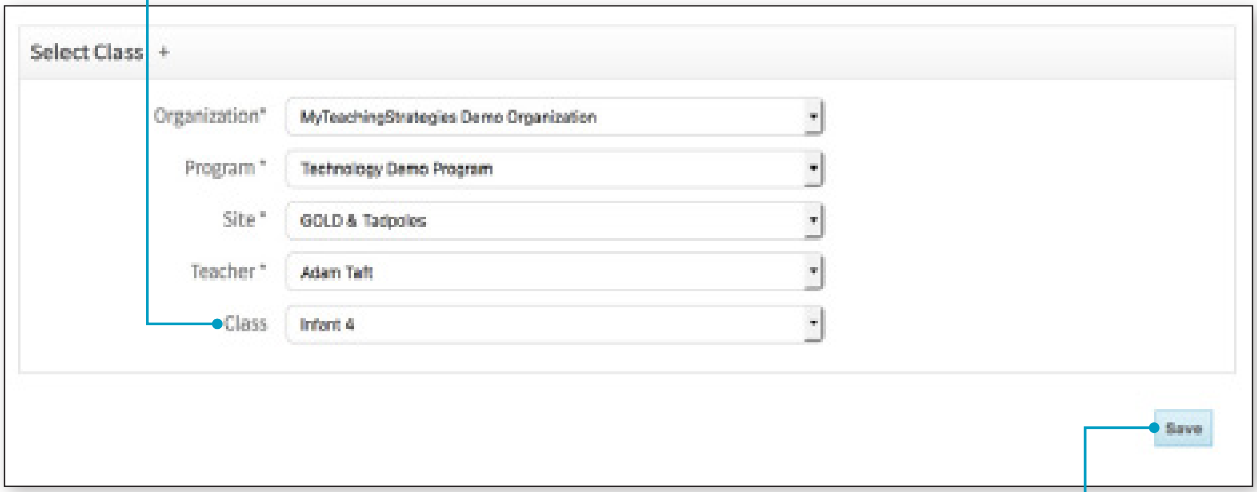
5 Select **REACTIVATE** from the left-hand navigation.





6 Confirm that you wish to reactivate this child record by selecting **YES**.

7 Select the classroom where this child record will be reactivated to and update their information.



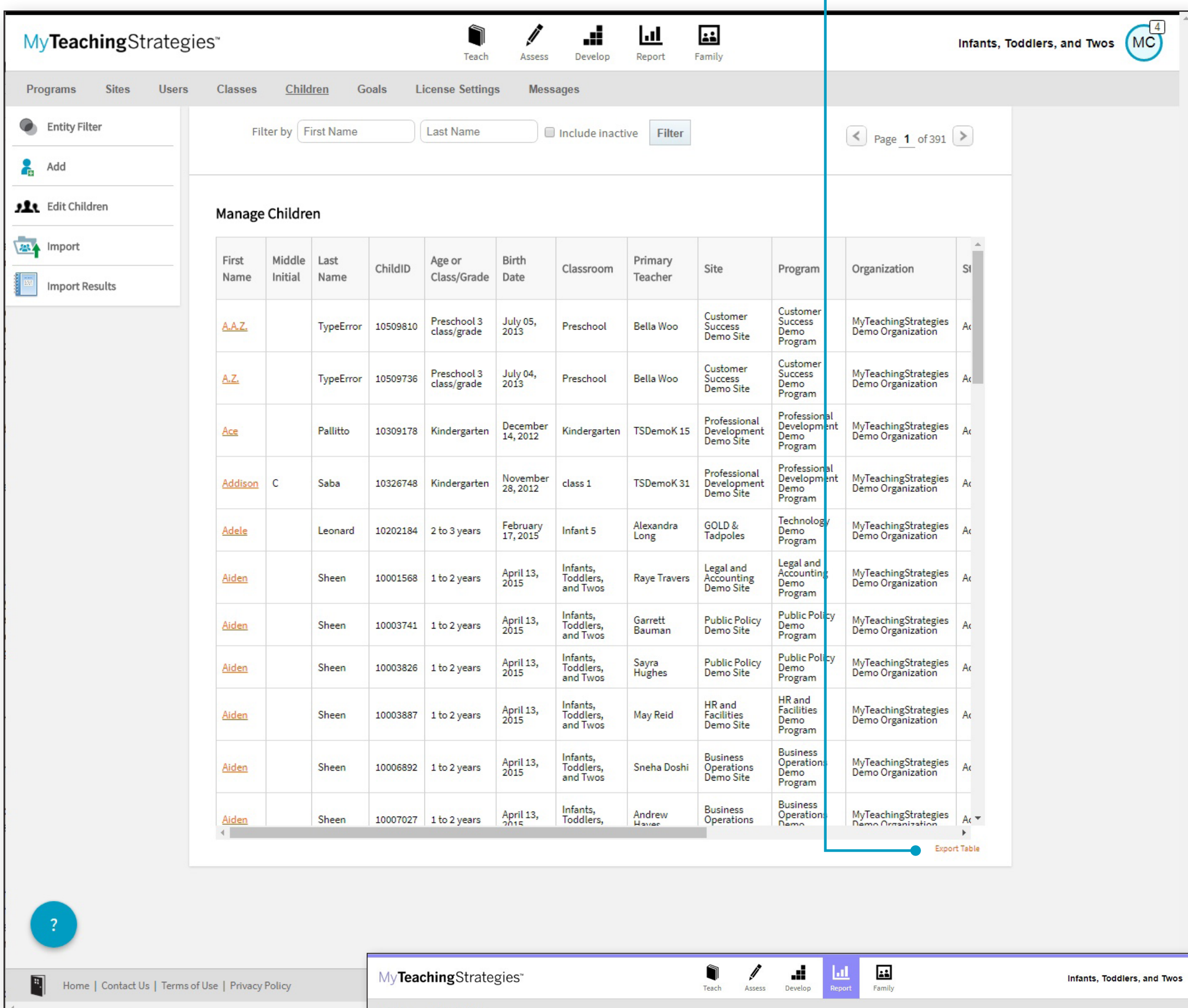
8 Select SAVE.

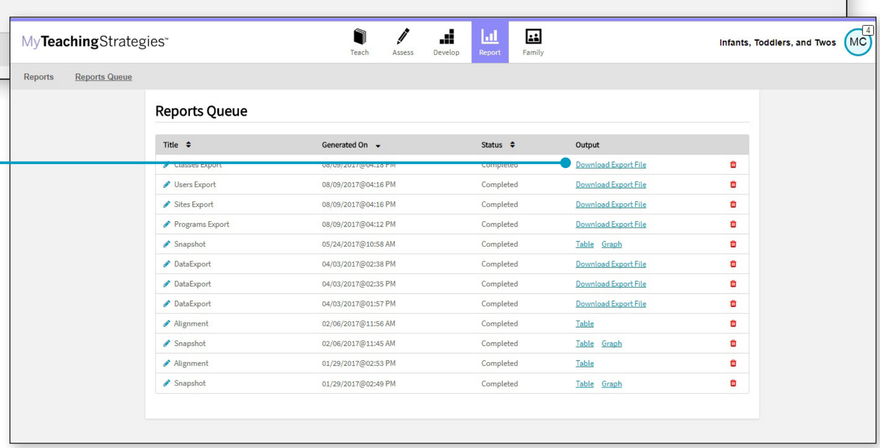
9 Confirm the reactivation by selecting YES.

Exporting Child Information

You can export all of your child information into Excel using the export table option.

1 Select EXPORT TABLE from the bottom of the child list. You will be taken to the Reports Queue, where your export will generate.





2 Select DOWNLOAD EXPORT FILE to download the Excel file.

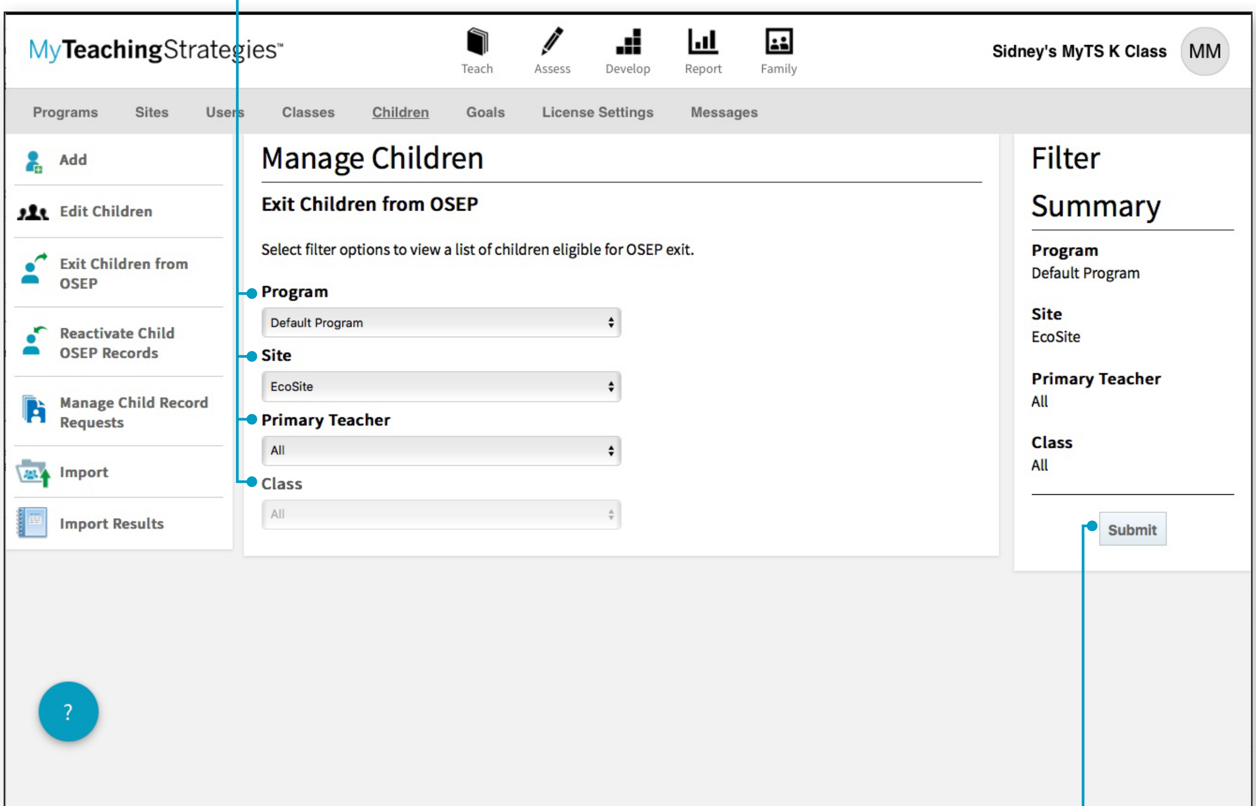
OSEP Management

You can exit child records from IEPs and IFSPs, and reactivate exited child records back into IEPs and IFSPs, using the OSEP management features within the Children section of the Administration area.

Exiting Children from OSEP

To exit a child from OSEP, select EXIT CHILDREN FROM OSEP from the Children left-hand navigation.

1 Select a PROGRAM and a SITE. You also have the option to select a TEACHER and/or a CLASS.

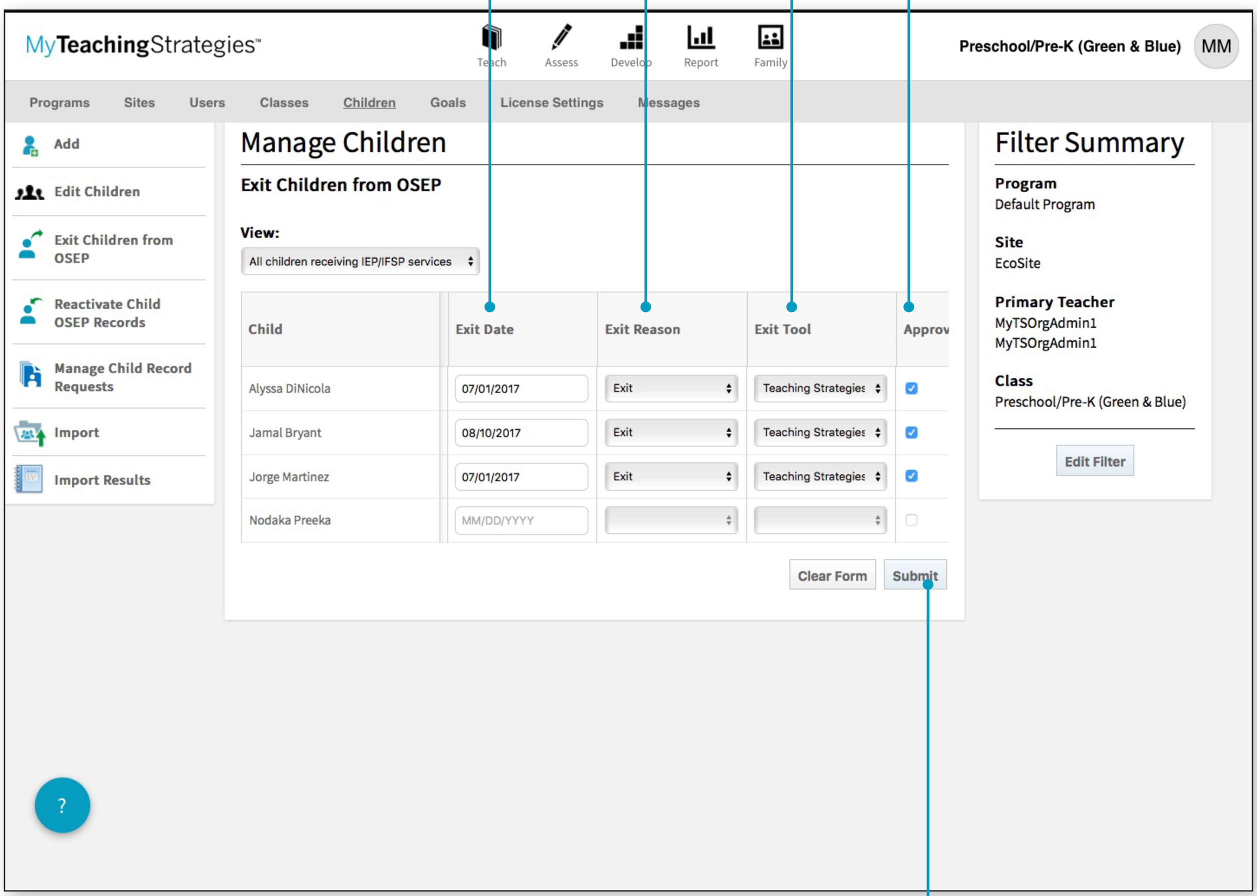


2 Select SUBMIT.

A list of child records that are on IEPs or IFSPs will appear. Those child records who have "Yes" listed in the Exit Requested column have sufficient data to be exited and have had an exit requested by their teacher.

1 For any child record with an exit request made, review the EXIT DATE, EXIT REASON, and EXIT TOOL, and make any necessary revisions.

2 Select APPROVE EXIT for the child record.



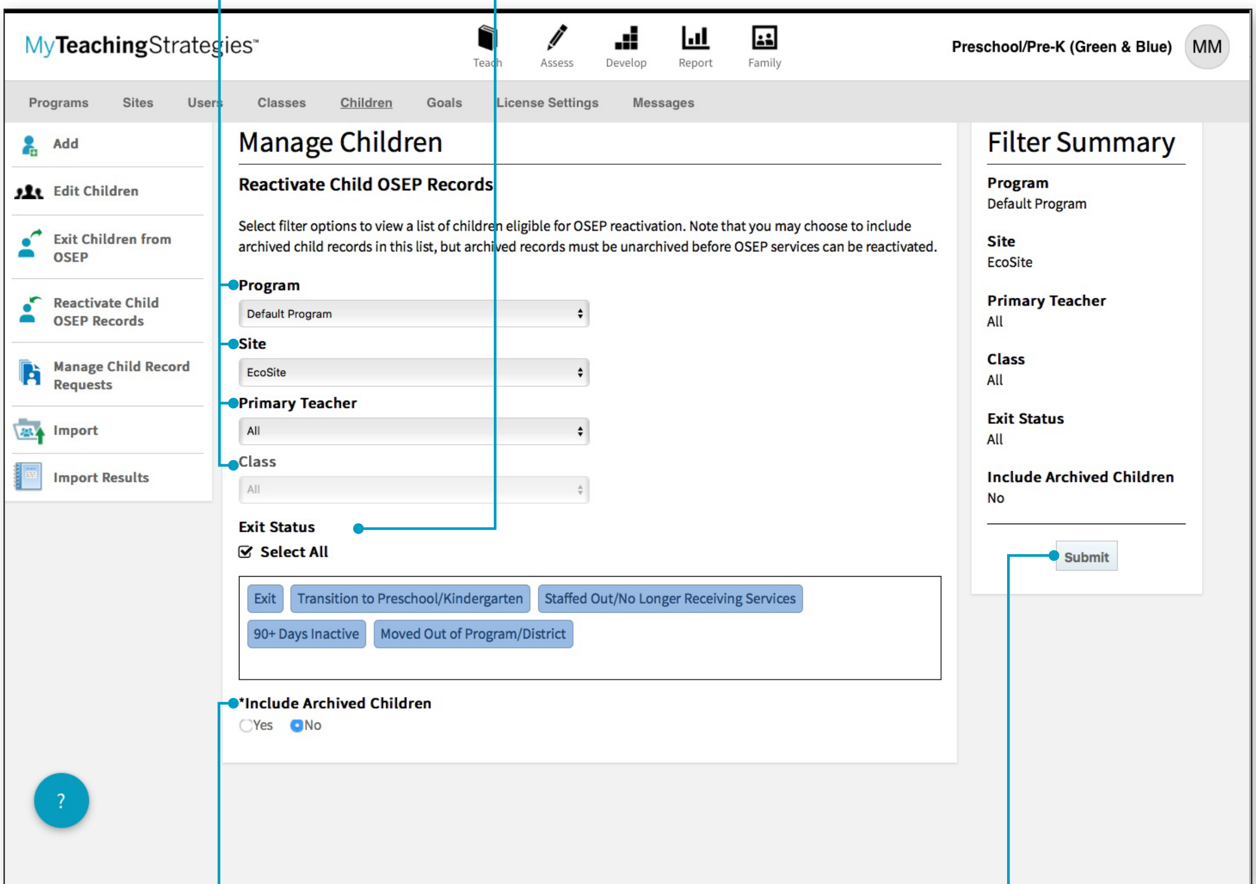
3 Select SUBMIT. That child record will then be exited from OSEP.

Reactivate Child OSEP Record

To reactivate a child from OSEP, select REACTIVATE CHILD OSEP RECORDS from the Children left-hand navigation.

1. Select a PROGRAM and a SITE. You also have the option to select a TEACHER and/or a CLASS.

2. All EXIT STATUSES are included by default – deselect any that are not needed.

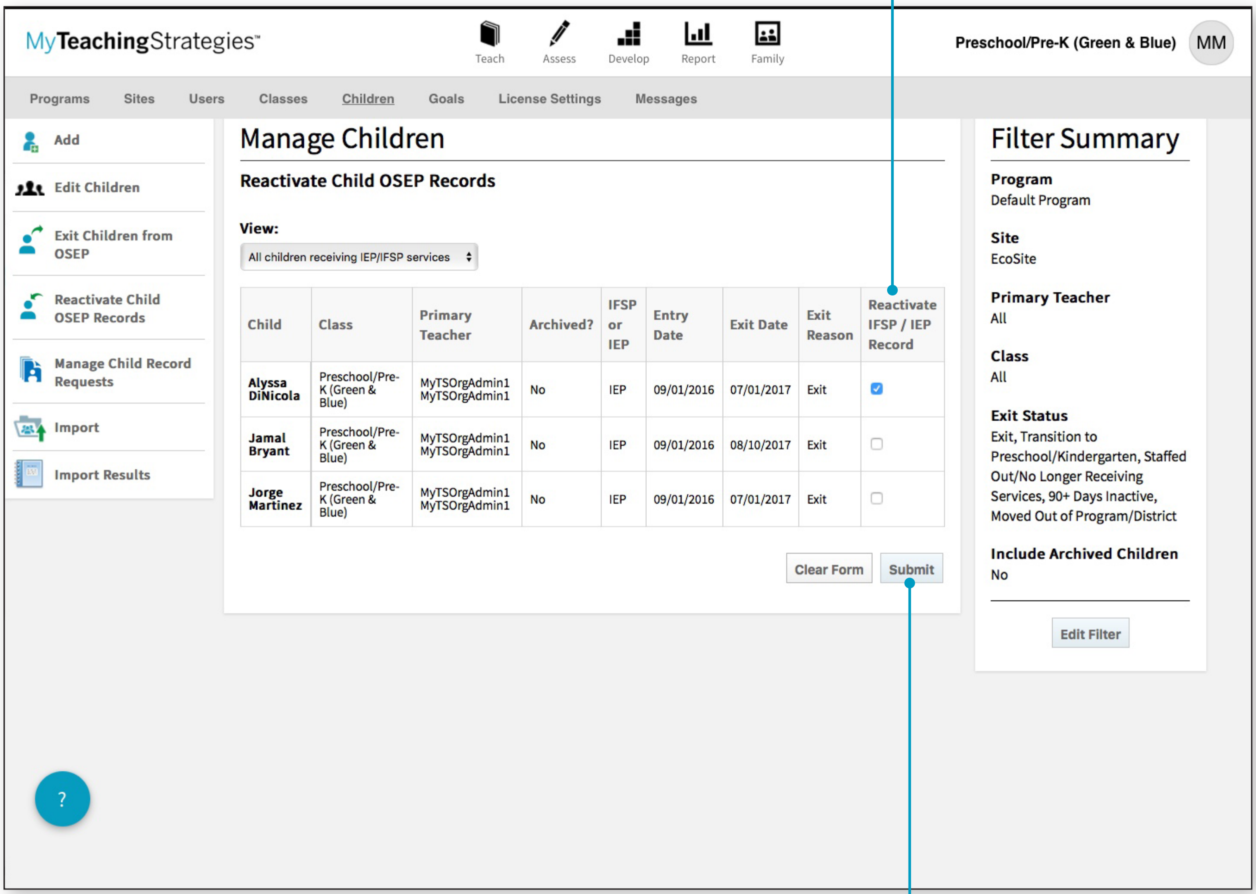


3. Choose whether or not to include ARCHIVED CHILDREN.

4. Select SUBMIT.

A list of child records will appear that have been exited from an IEP or IFSP.

1 Select REACTIVATE IFSP / IEP RECORD for one or more child records.



2 Select SUBMIT. Those IEP or IFSP records will be reactivated.

Administrator Quick Links

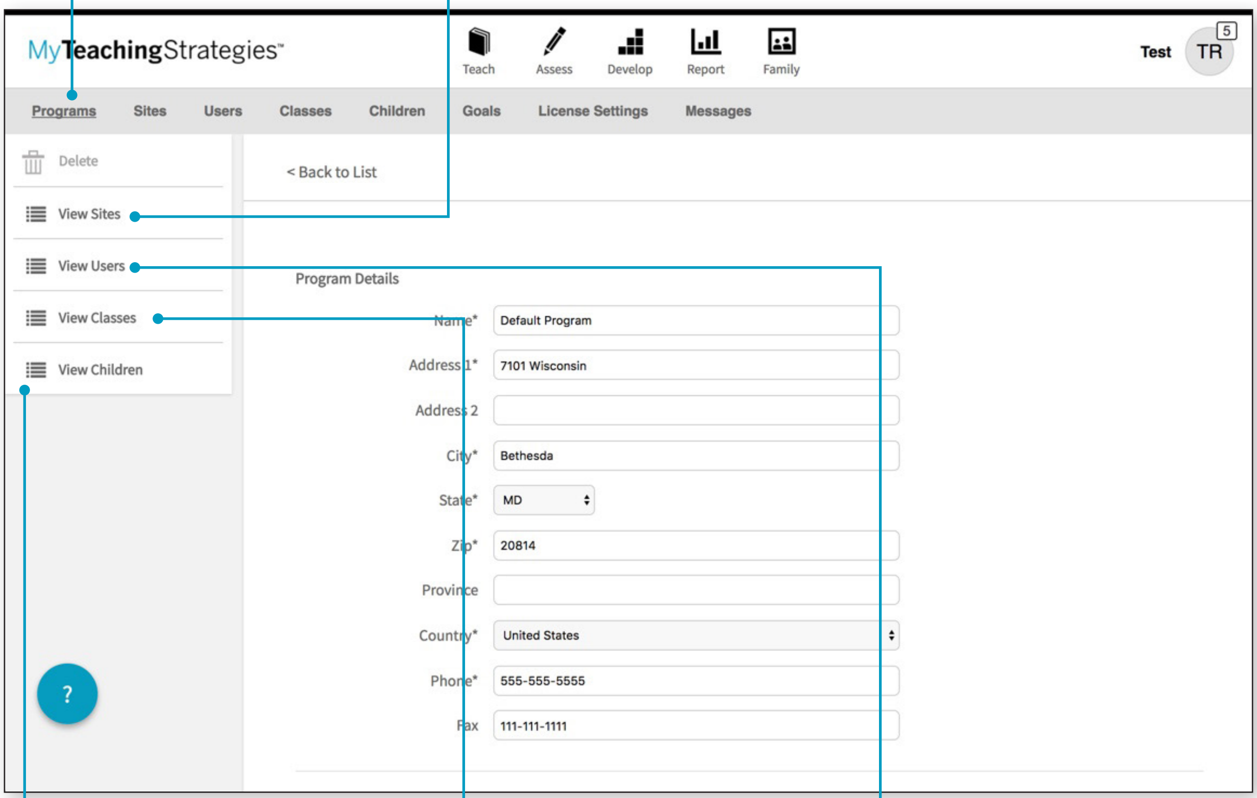
Administrators can easily jump to a list of available sites, users, classes, and children when viewing a program, site, user, or class.

When Viewing a Program

Select PROGRAMS from the Administration sub-navigation.

Select the specific program you wish to view.

If you wish to view a list of all the sites in that specific program, select VIEW SITES in the left-hand navigation.



If you wish to view a list of all the children in that specific program, select VIEW CHILDREN in the left-hand navigation.

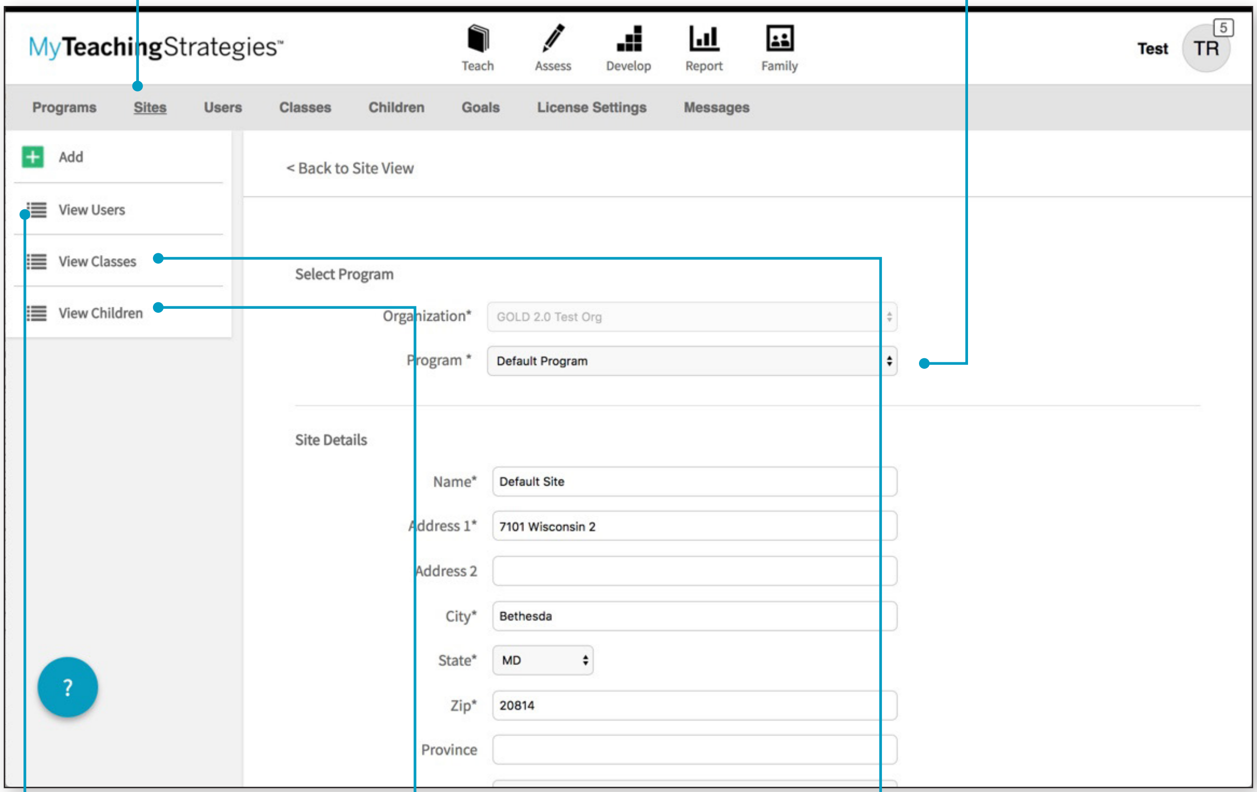
If you wish to view a list of all the classes in that specific program, select VIEW CLASSES in the left-hand navigation.

If you wish to view a list of all the users in that specific program, select VIEW USERS in the left-hand navigation.

When Viewing a Site

Select SITES from the Administration sub-navigation.

Select the specific program you wish to view.



If you wish to view a list of all the users in that specific site, select VIEW USERS in the left-hand navigation.

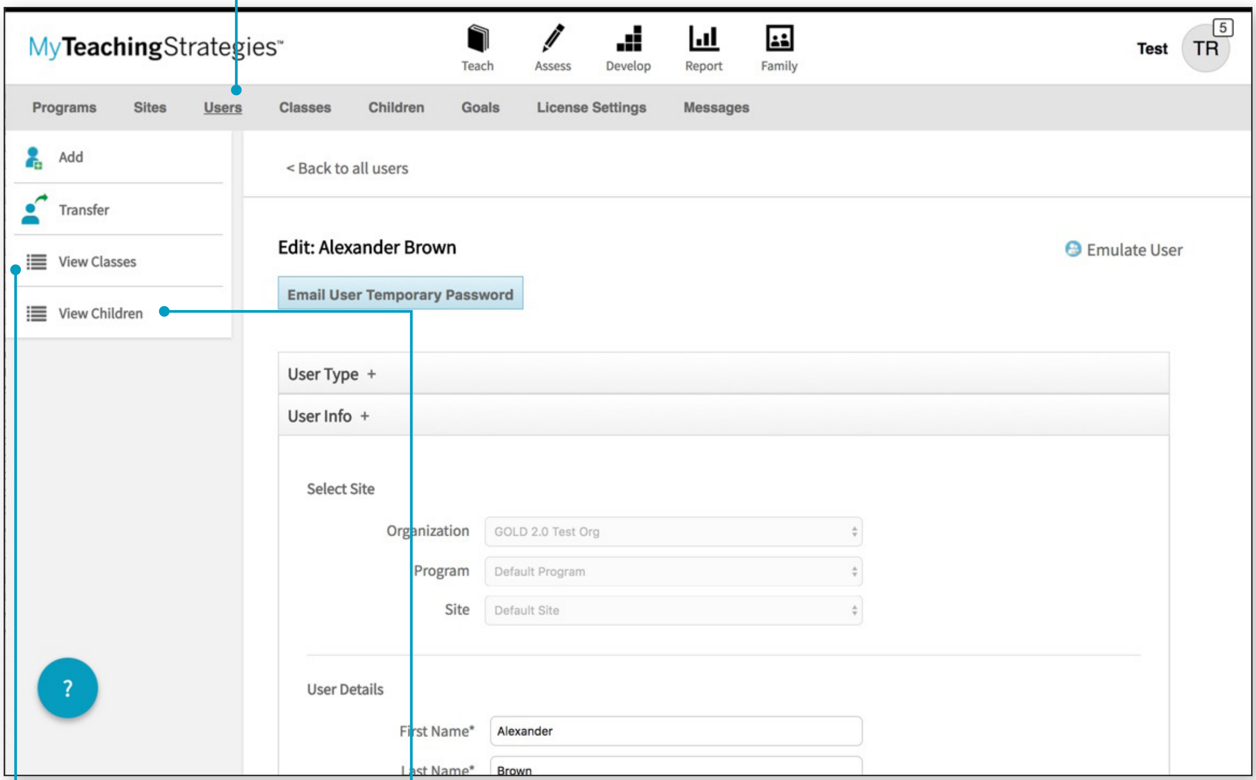
If you wish to view a list of all the children in that specific site, select VIEW CHILDREN in the left-hand navigation.

If you wish to view a list of all the classes in that specific site, select VIEW CLASSES in the left-hand navigation.

When Viewing a User

Select USERS from the Administration sub-navigation.

Select the specific user you wish to view.



If you wish to view a list of all the classes for that specific user, select VIEW CLASSES in the left-hand navigation.

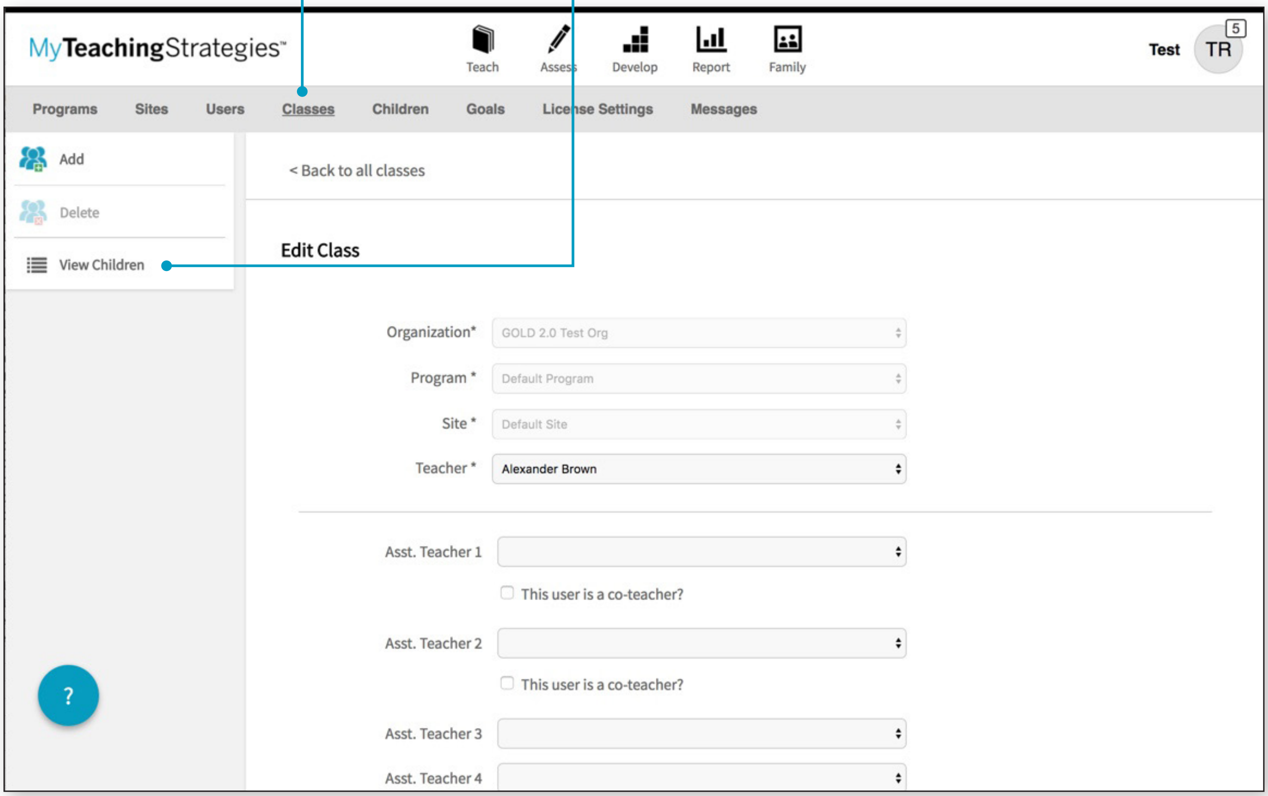
If you wish to view a list of all the children for that specific user, select VIEW CHILDREN in the left-hand navigation.

When Viewing a Class

Select CLASSES from the Administration sub-navigation.

Select the specific class you wish to view.

If you wish to view a list of all the children for that specific class, select VIEW CHILDREN in the left-hand navigation.



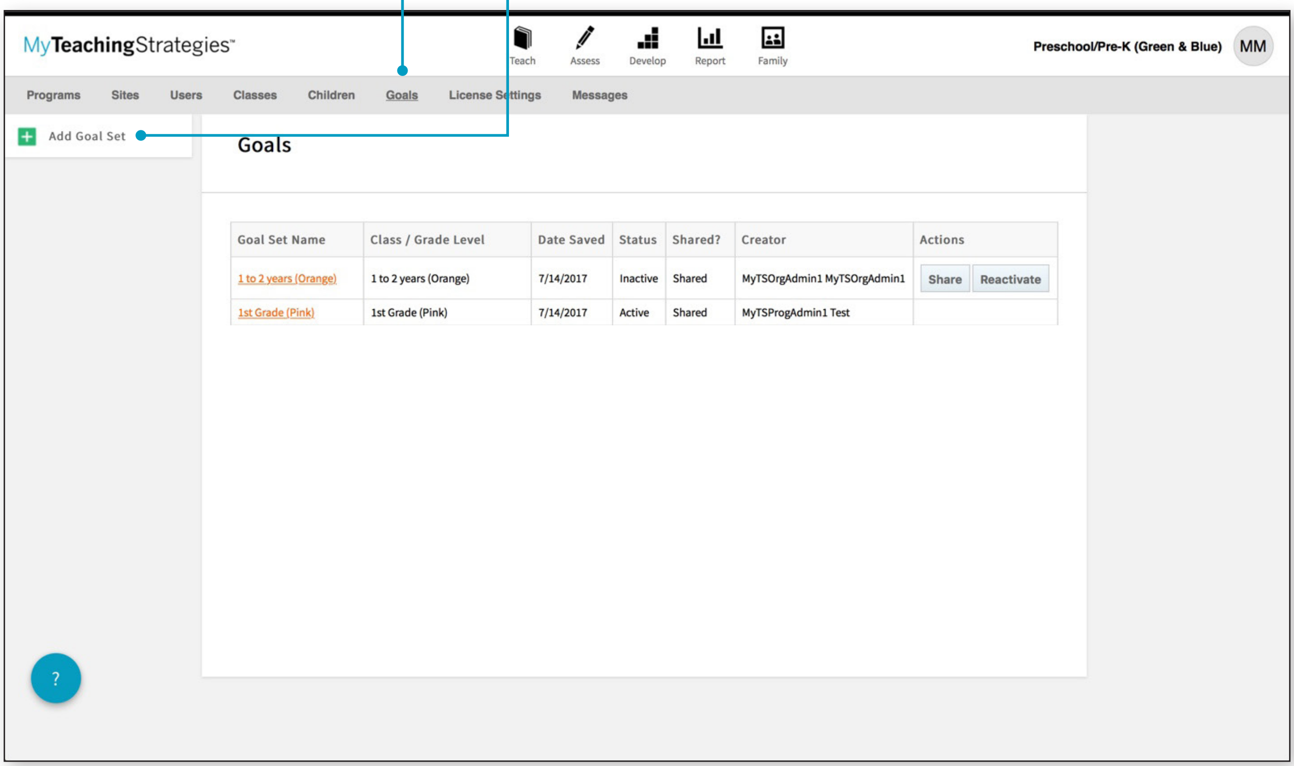
Goals

You can create, edit, and share goal sets to be used on the Goals report. The Goals report allows you to compare child outcomes data to specific year-end goals for your program.

Adding or Editing a Goal Set

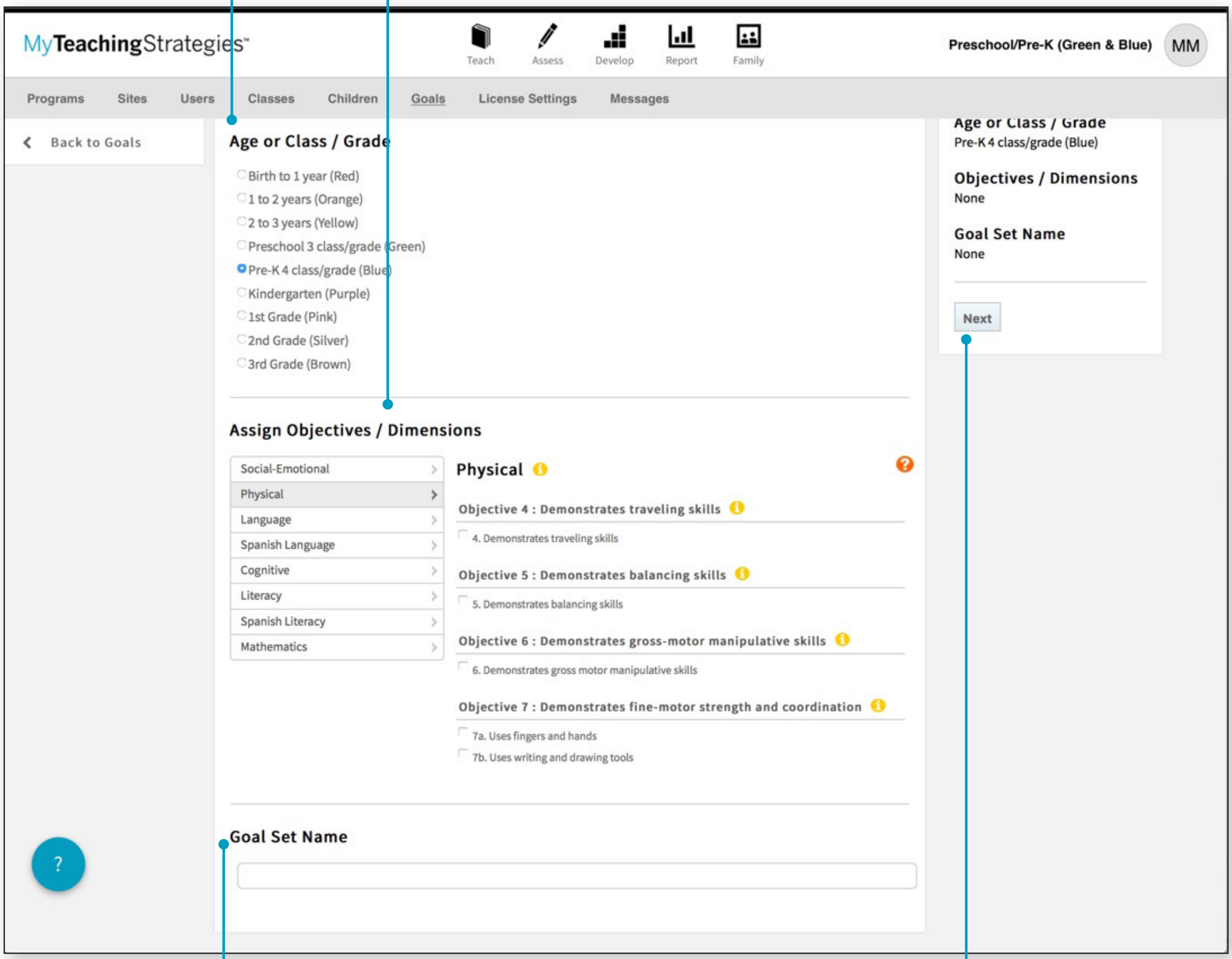
1. Select GOALS from the Administration sub-navigation.

2. Select ADD GOAL SET in the left-hand navigation.



1 Select an AGE or CLASS/GRADE.

2 Assign the specific OBJECTIVES/ DIMENSIONS you wish to be a part of the goals set.

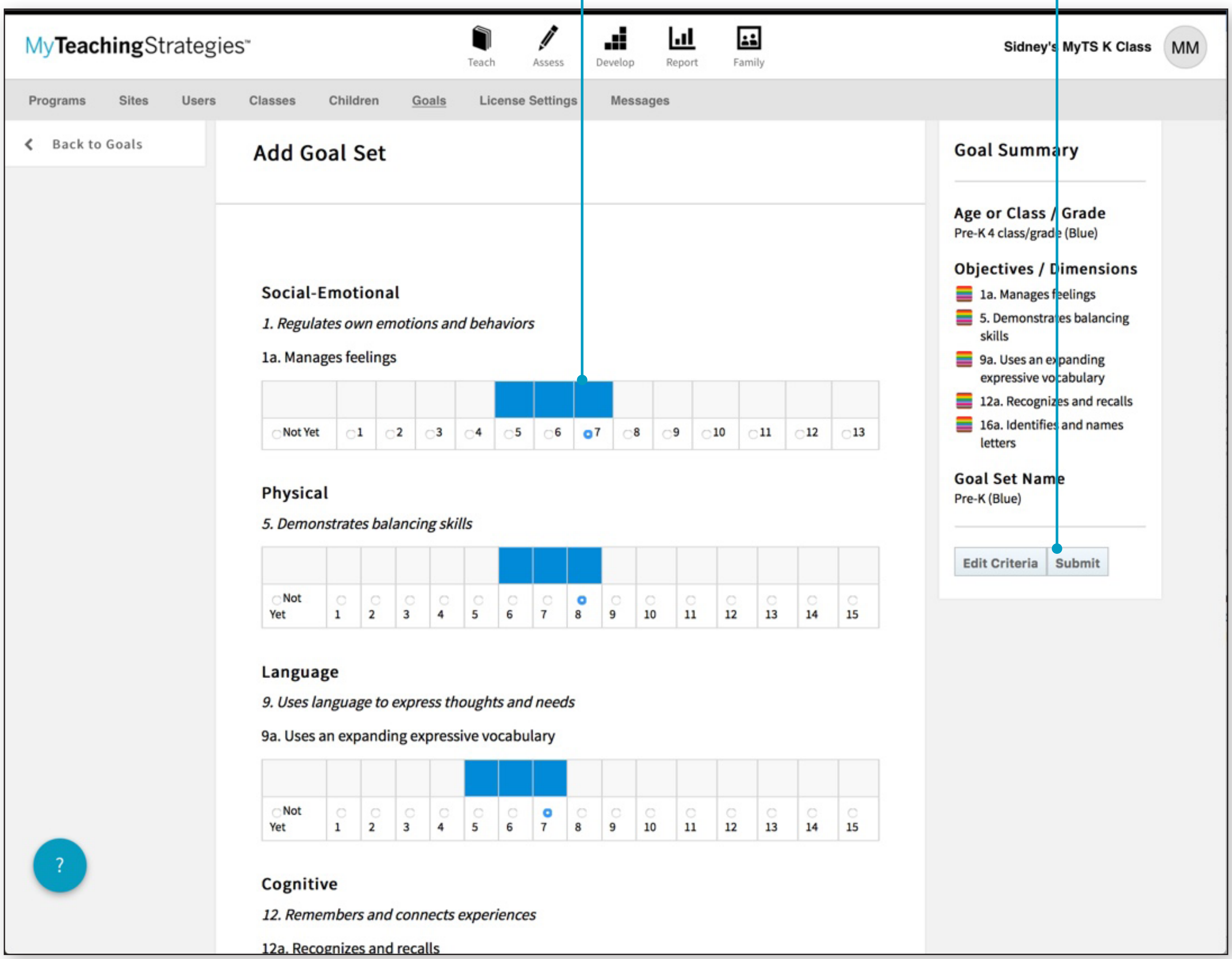


3 Type in a name for the goals set under GOAL SET NAME.

4 Select NEXT.

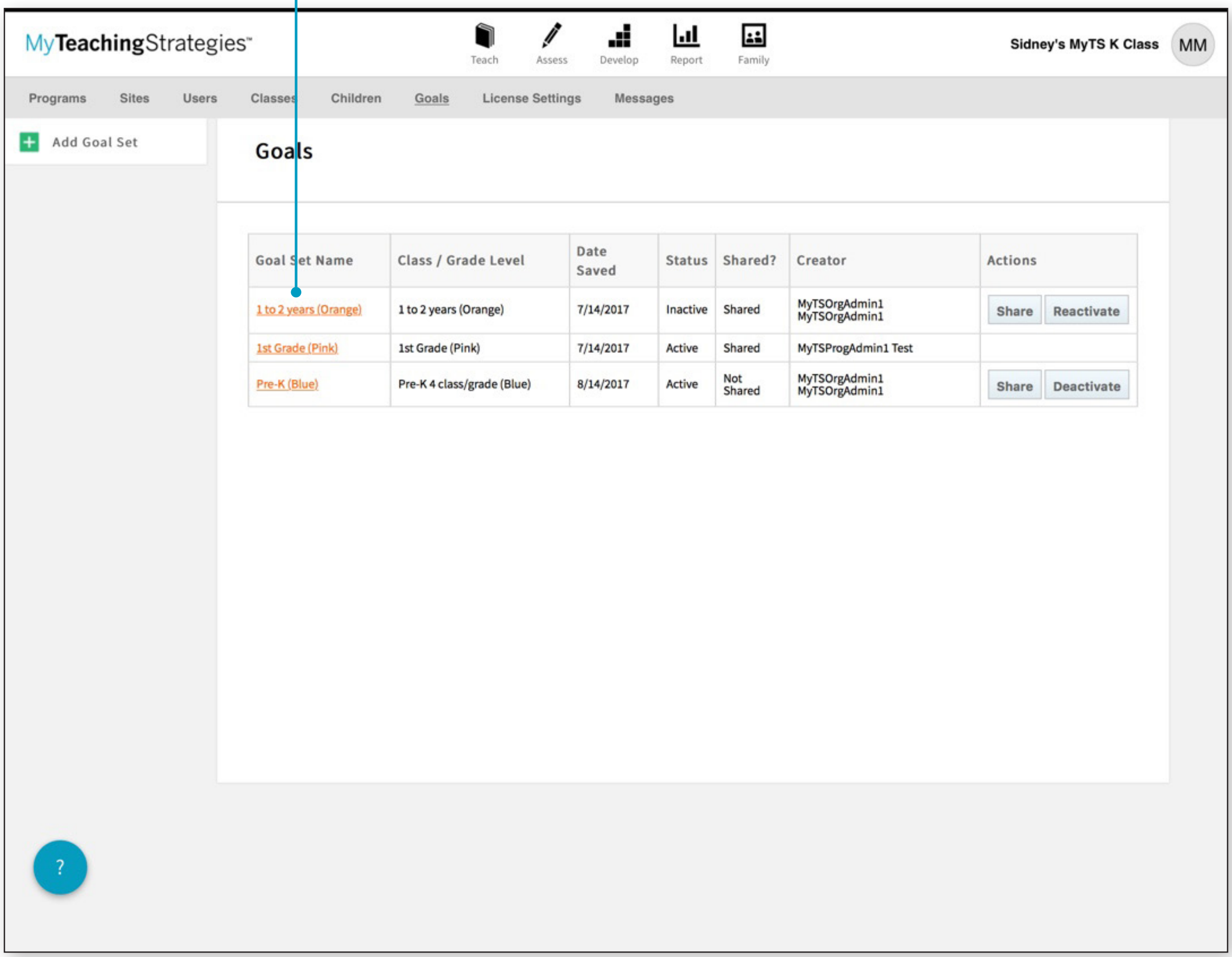
5 Assign a year-end goal for each of the selected objectives/dimensions by selecting a level along each progression. The colored sections of the progression indicate the widely held expectations range for the selected age or class/grade. The default level selected for each progression is the last level along the widely held expectations for that item.

6 Select SUBMIT.



You will now find your new goal set listed on the Goals main page.

To edit this goal set, select the name of the goal set to adjust objectives/dimensions or selected levels.

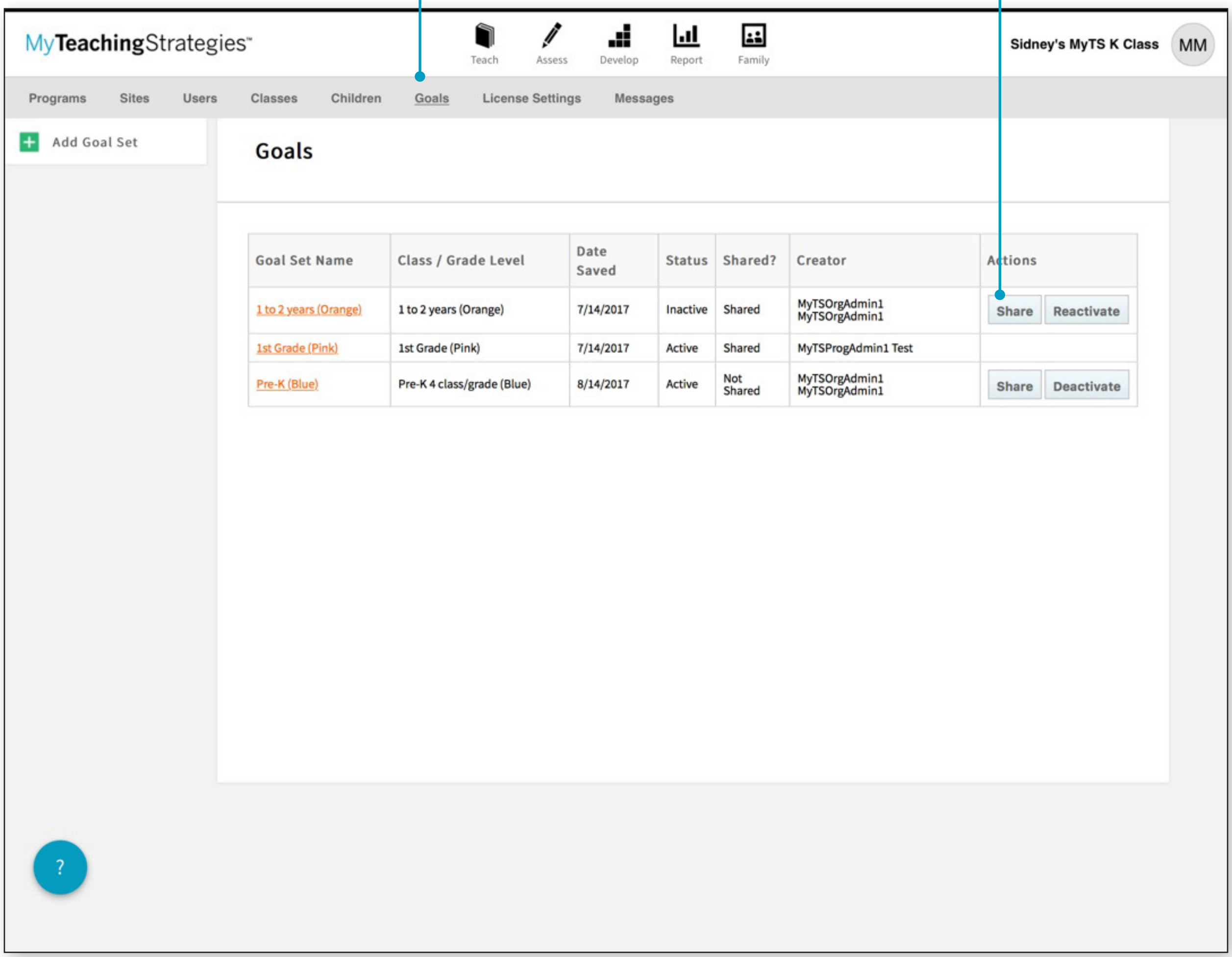


Sharing a Goal Set

You can share goal sets so that other administrators in the license can use the same goal sets when generating the Goals report.

1. Select GOALS from the Administration sub-navigation.

2. Select SHARE to the right of a listed goal set.



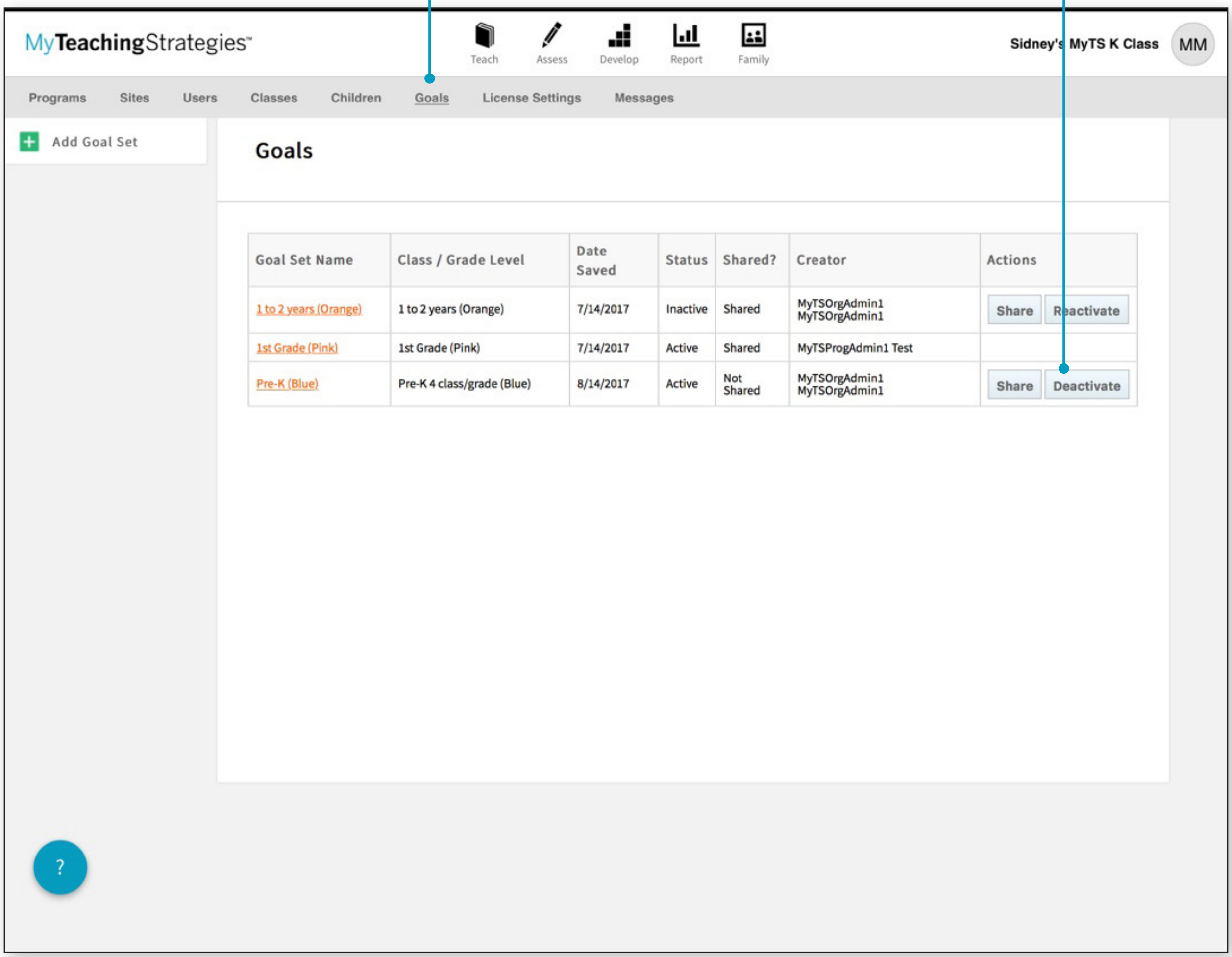
The goal set will be shared with all other administrators in your license, and will be visible on the Goals main page and accessible when generating a Goals report.

Deactivating a Goal Set

You can deactivate a goal set that you have created so that the goal set is no longer accessible in the Goals report.

1. Select GOALS from the Administration sub-navigation.

2. Select DEACTIVATE to the right of a listed goal set.

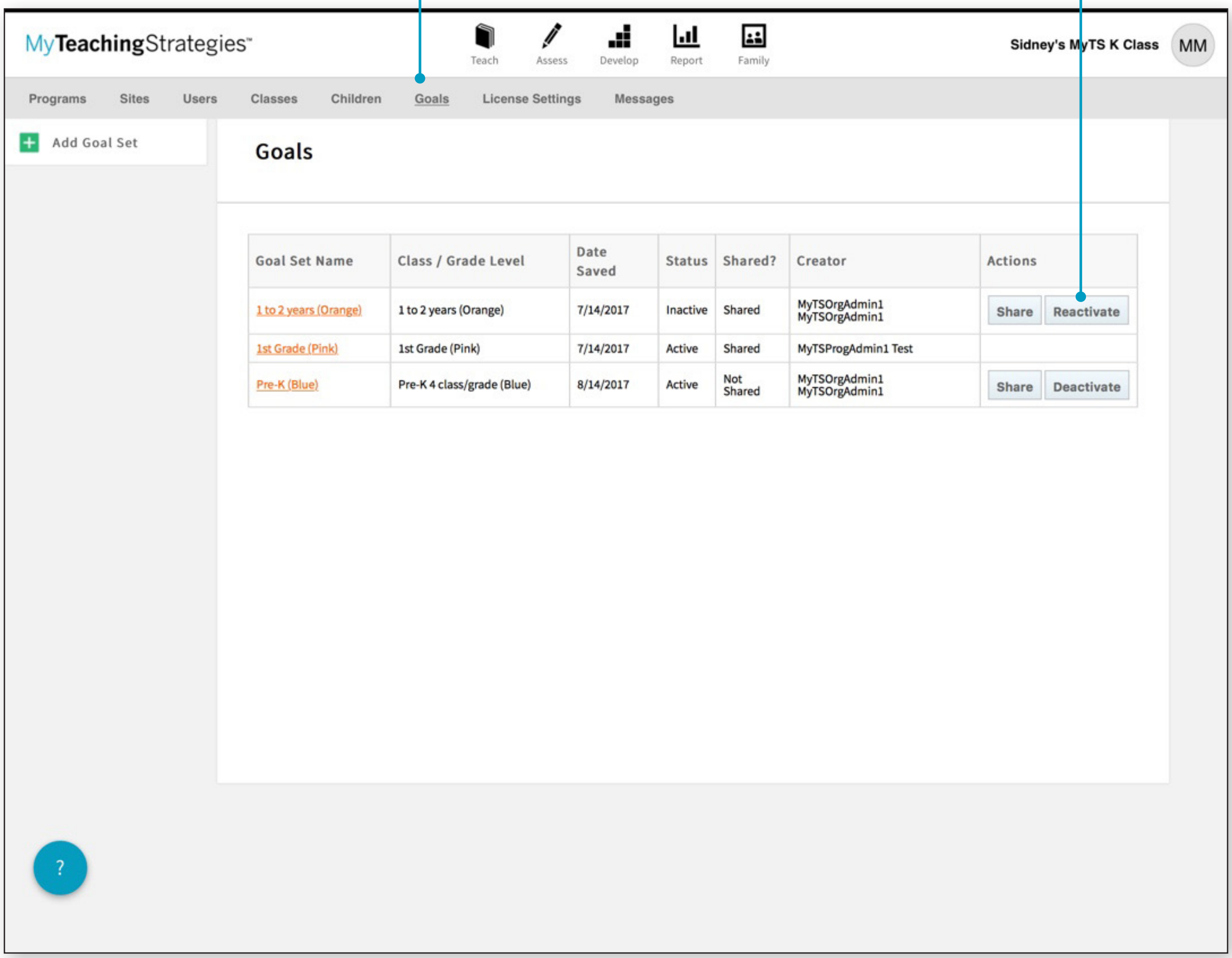


That goal set will be deactivated, and will no longer be accessible in the Goals report. If the goal set had been shared, the goal set will also no longer be accessible in the Goals report for the other administrators in the license.

Reactivating a Goal Set

1 Select GOALS from the Administration sub-navigation.

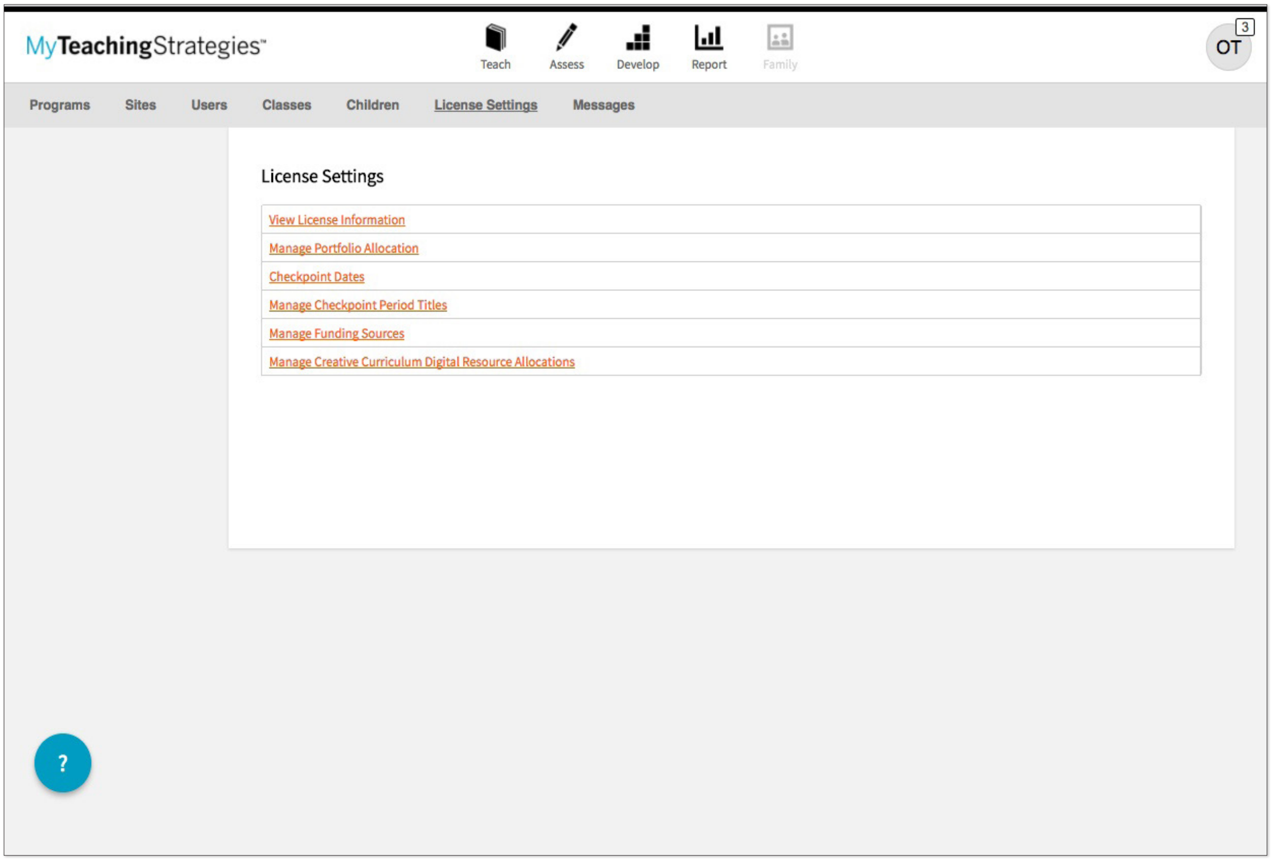
2 Select REACTIVATE to the right of a listed goal set.



The goal set will once again be accessible in the Goals report. If the goal set had been shared, the goal set will return to being accessible in the Goals report for the other administrators in the license.

License Settings

The License Settings area enables you to manage your portfolio allocation, set checkpoint dates, manage checkpoint period titles, manage your funding sources, and view your license information.



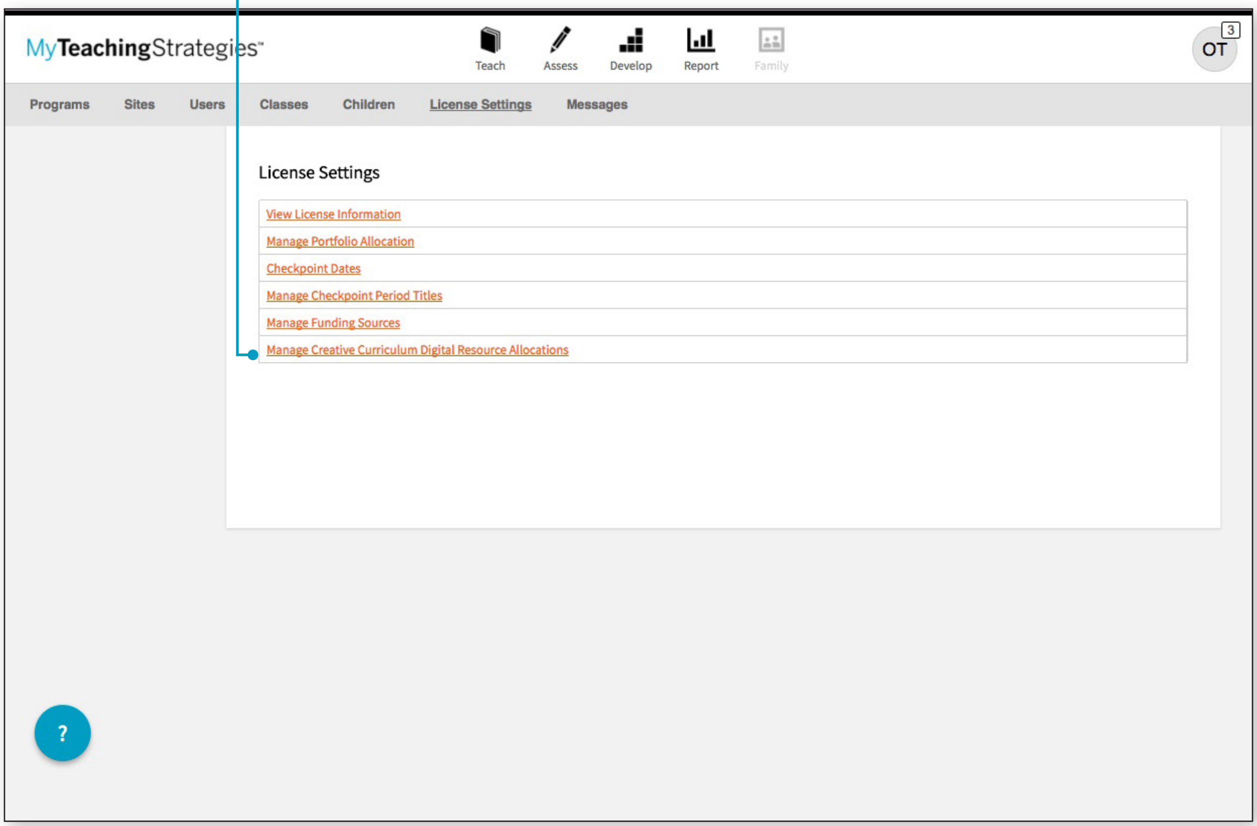
Allocating the *The Creative Curriculum*®, Digital Resources

Subscribers to the *The Creative Curriculum*®, Digital Resources can allocate licenses to programs, sites, and classrooms, granting teachers access to these digital curriculum resources.

To begin allocating licenses, navigate to ADMINISTRATION in the profile menu and select LICENSE SETTINGS in the sub-navigation.

Please note: *The Creative Curriculum*®, Digital Resources are available as a 12-month subscription. *The Creative Curriculum*®, Digital Resources are not included with your *GOLD*® subscription. For more information about *The Creative Curriculum*®, Digital Resources, please visit: https://teachingstrategies.com/solutions/teach/digital-curriculum-resources/.

Select MANAGE CREATIVE CURRICULUM DIGITAL RESOURCE ALLOCATIONS.

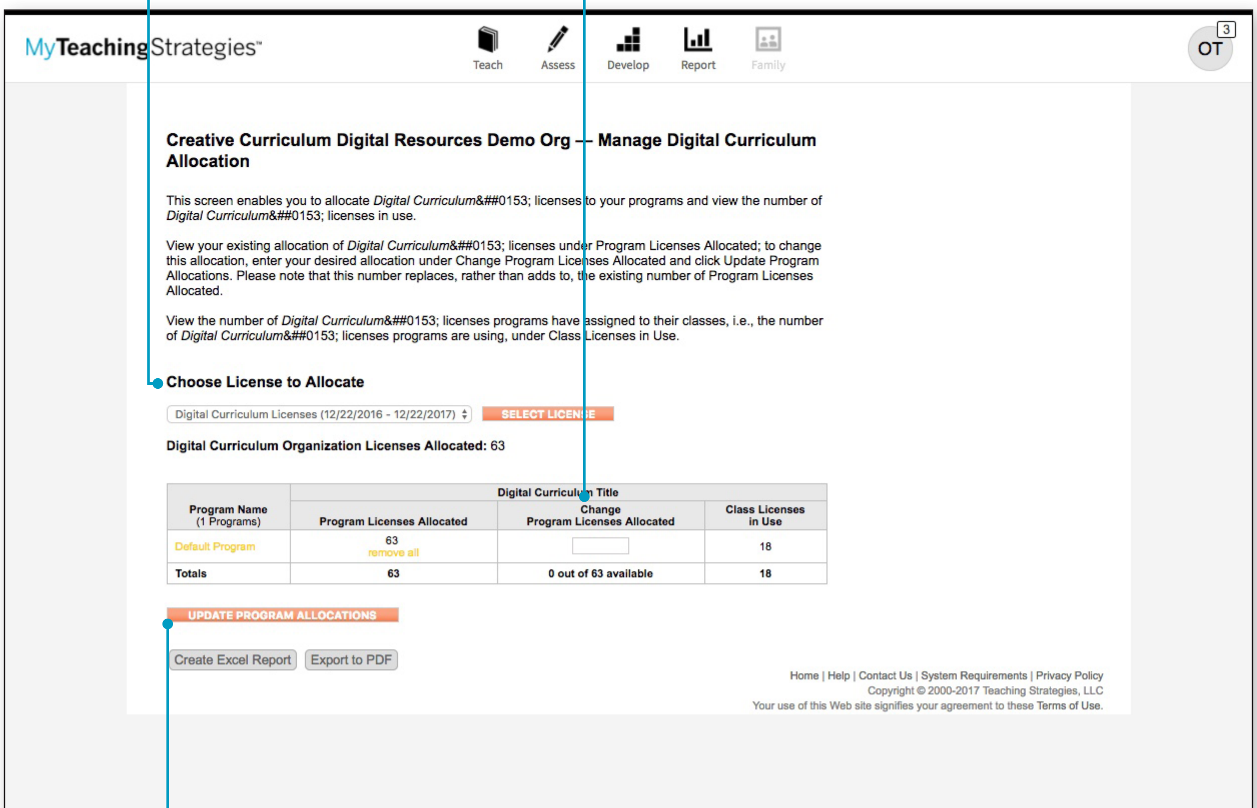


Allocating to Programs

If you are an organization-level administrator, you will start by allocating *The Creative Curriculum®*, Digital Resources licenses to participating programs.

2 Type in the number of total licenses you wish each program to have in the CHANGE PROGRAM LICENSES ALLOCATED column.

1 Select your current license from CHOOSE LICENSE TO ALLOCATE.



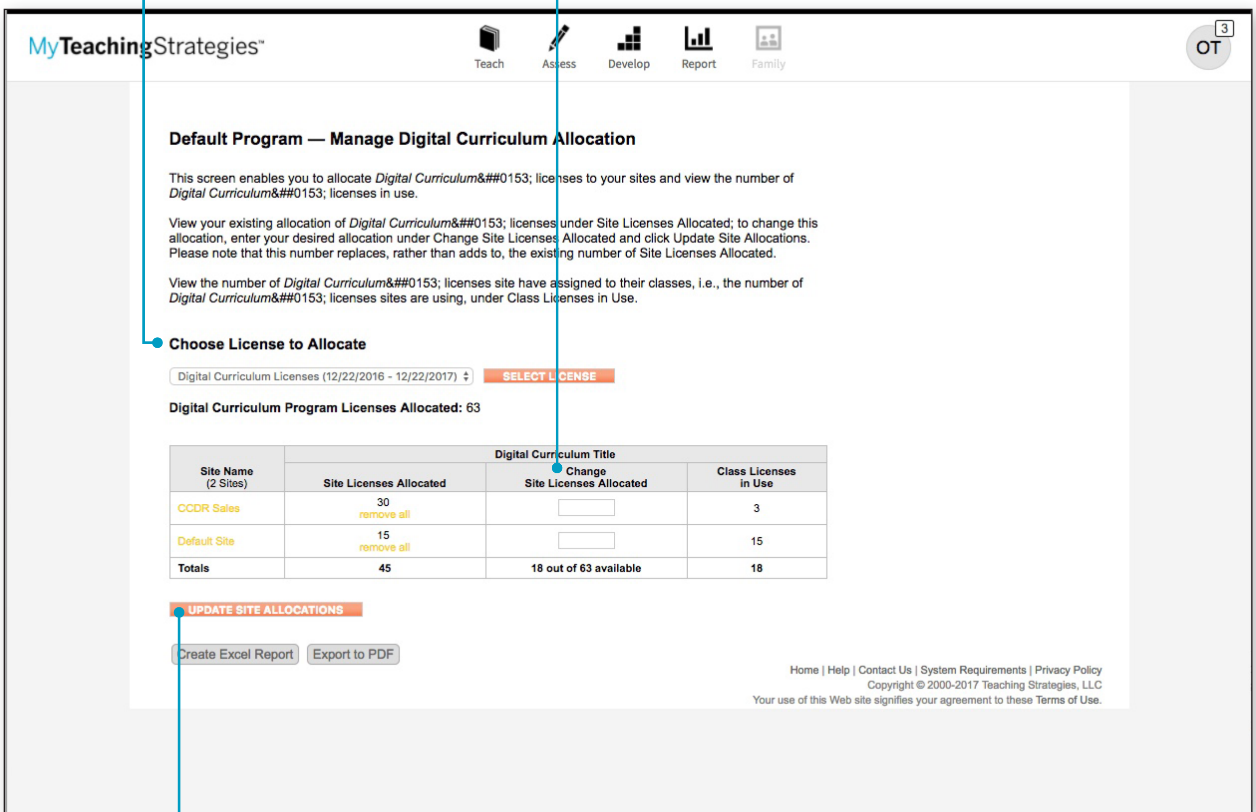
3 Select UPDATE PROGRAM ALLOCATIONS.

Allocate to Sites

If you are a program-level administrator, you can allocate *The Creative Curriculum*®, Digital Resources licenses to participating sites.

1 Select your current license from CHOOSE LICENSE TO ALLOCATE.

2 Type in the number of total licenses you wish each site to have in the CHANGE SITE LICENSES ALLOCATED column.



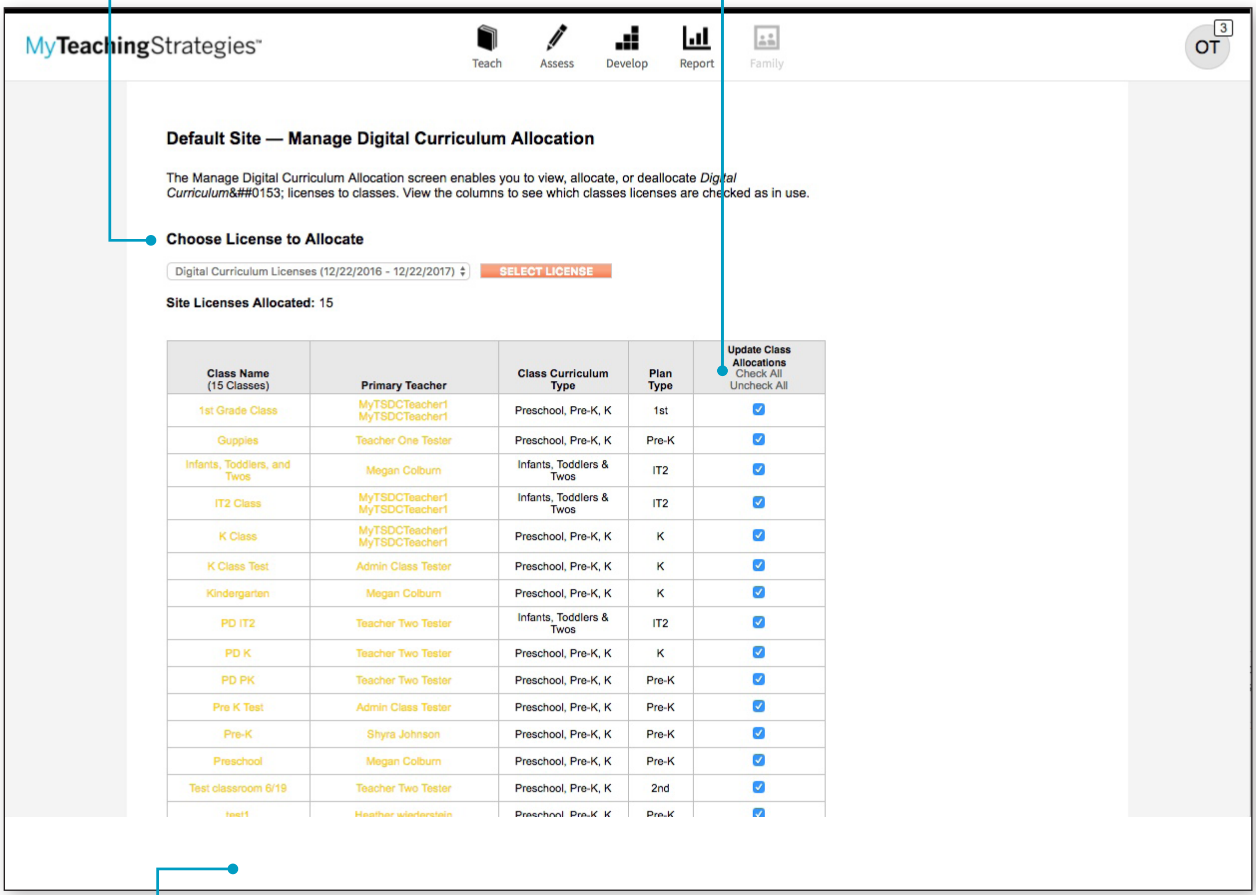
3 Select UPDATE SITE ALLOCATIONS.

Allocate to Classes

If you are a site-level administrator, you can allocate *The Creative Curriculum*®, Digital Resources licenses to participating classrooms.

1. Select your current license from CHOOSE LICENSE TO ALLOCATE.

2. Select the checkbox next to each class that you would like to allocate *The Creative Curriculum*®, Digital Resources to in the UPDATE CLASS ALLOCATIONS column.



3. Select UPDATE CLASS ALLOCATIONS.

Allocating Online Professional Development

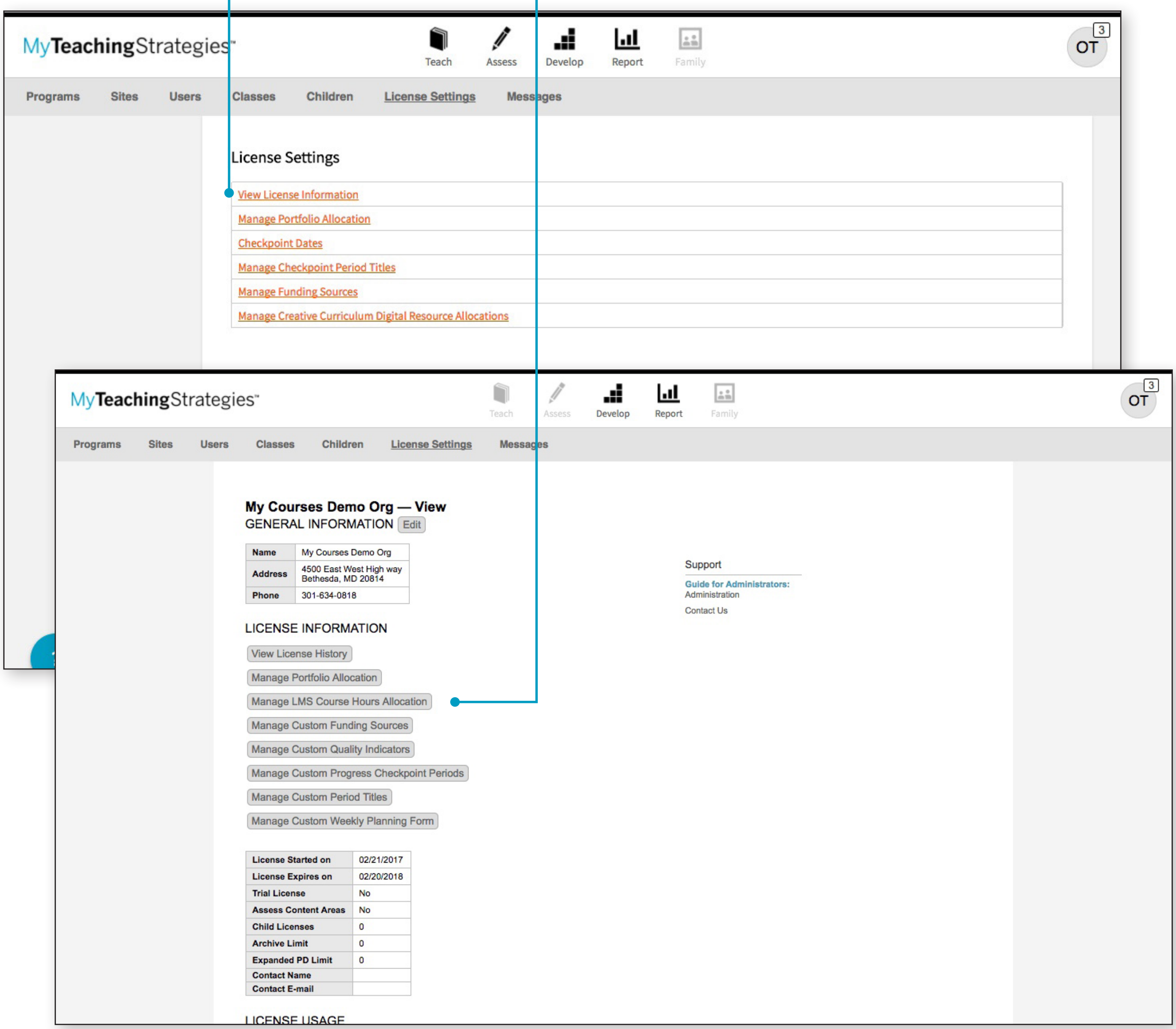
Administrators who have purchased online professional development course credits can allocate credits to programs, sites, and classrooms, granting users access to CEU credit-bearing courses.

To begin allocating licenses, navigate to ADMINISTRATION in the profile menu and select LICENSE SETTINGS in the sub-navigation.

Please note: Online Professional Development course credits are available as an additional 12-month subscription. Credits for CEU-bearing courses are not included with your *GOLD*® subscription. For more information about Online Professional Development opportunities, please visit: https://TeachingStrategies.com/OnlinePD.

1 Select VIEW LICENSE INFORMATION.

2 Select MANAGE LMS COURSE HOURS ALLOCATION.

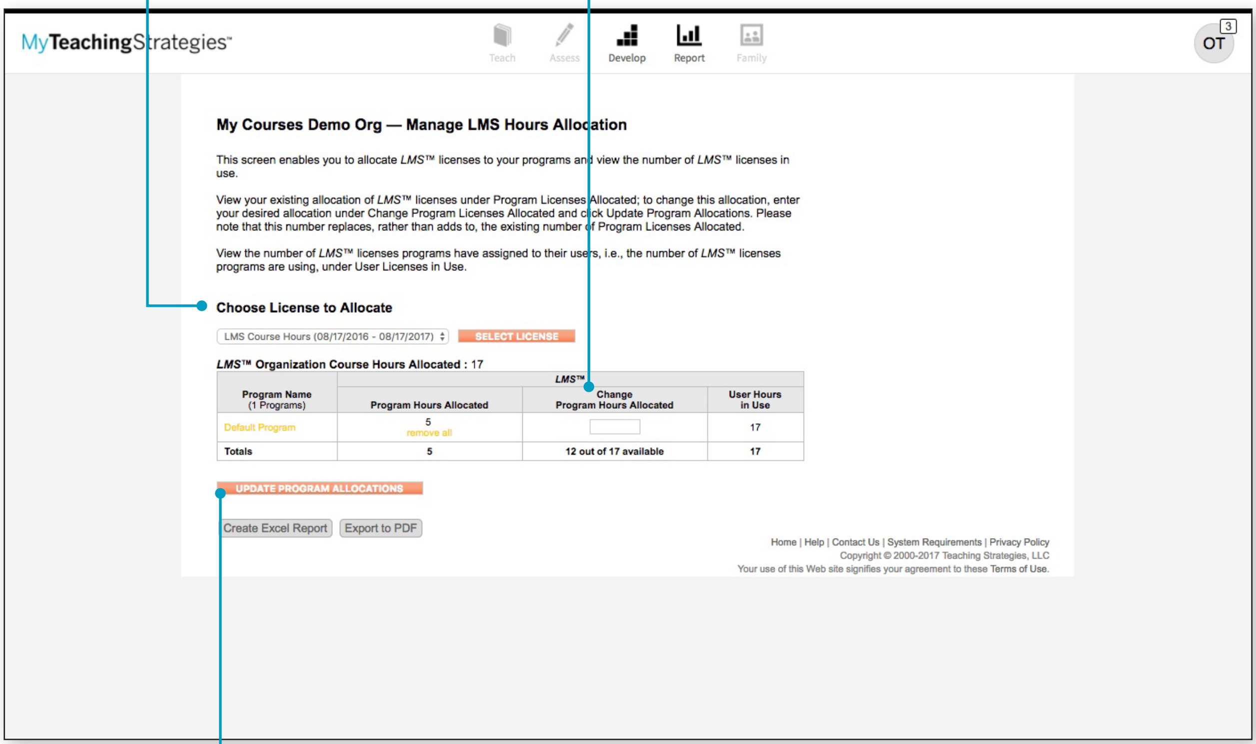


Allocating to Programs

If you are an organization-level administrator, you will start by allocating course credits to participating programs.

1 Select your current license from CHOOSE LICENSE TO ALLOCATE.

2 Type in the number of total course credits you wish each program to have in the CHANGE PROGRAM HOURS ALLOCATED column.



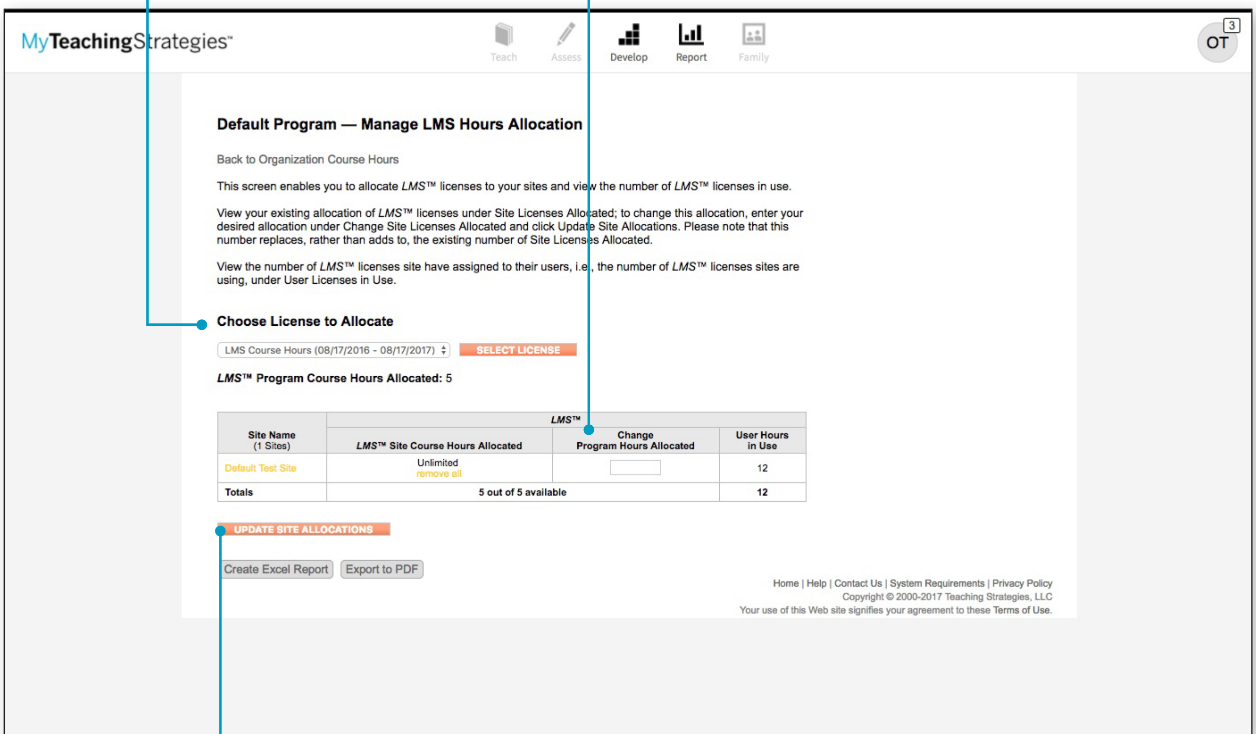
3 Select UPDATE PROGRAM ALLOCATIONS.

Allocating to Sites

If you are a program-level administrator, you can allocate course credits to participating sites.

1. Select your current license from CHOOSE LICENSE TO ALLOCATE.

2. Type in the number of total licenses you wish each site to have in the CHANGE PROGRAM HOURS ALLOCATED column.



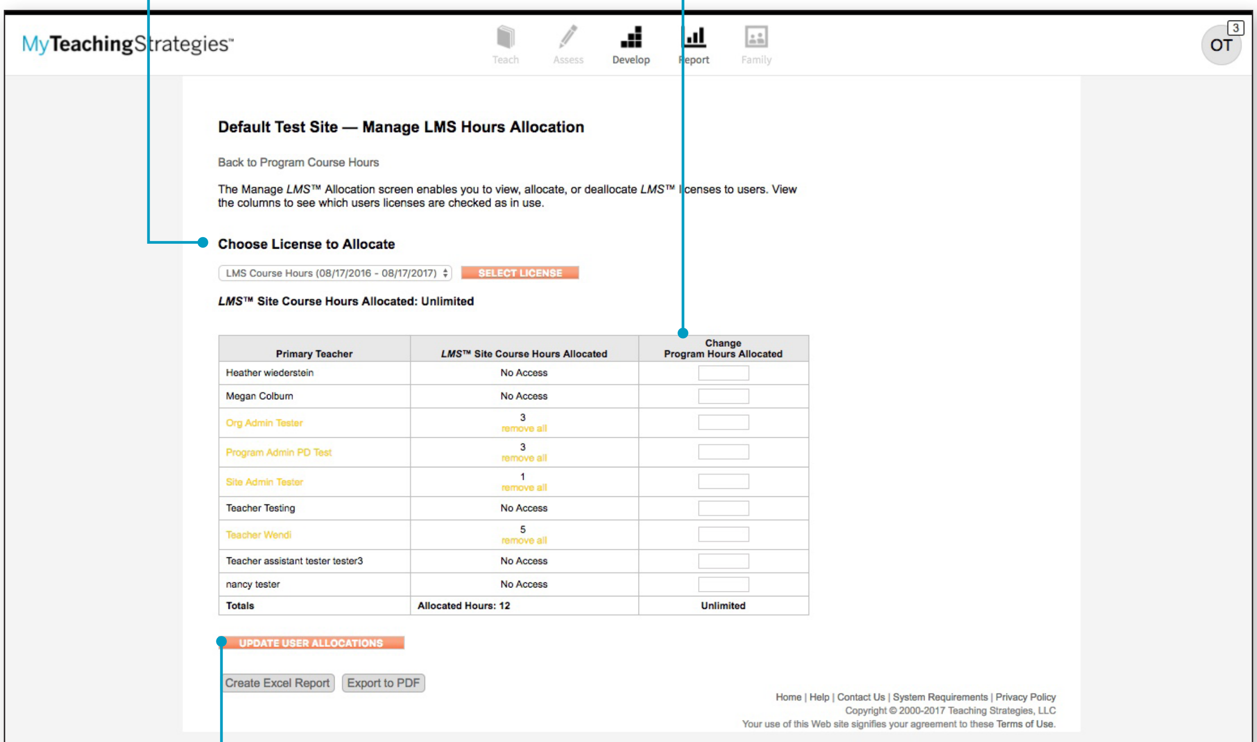
3. Select UPDATE SITE ALLOCATIONS.

Allocate to Users

If you are a site-level administrator, you can allocate course credits to participating users.

1. Select your current license from CHOOSE LICENSE TO ALLOCATE.

2. Type in the number of total course credits you wish each user to have in the UPDATE USER ALLOCATIONS column.

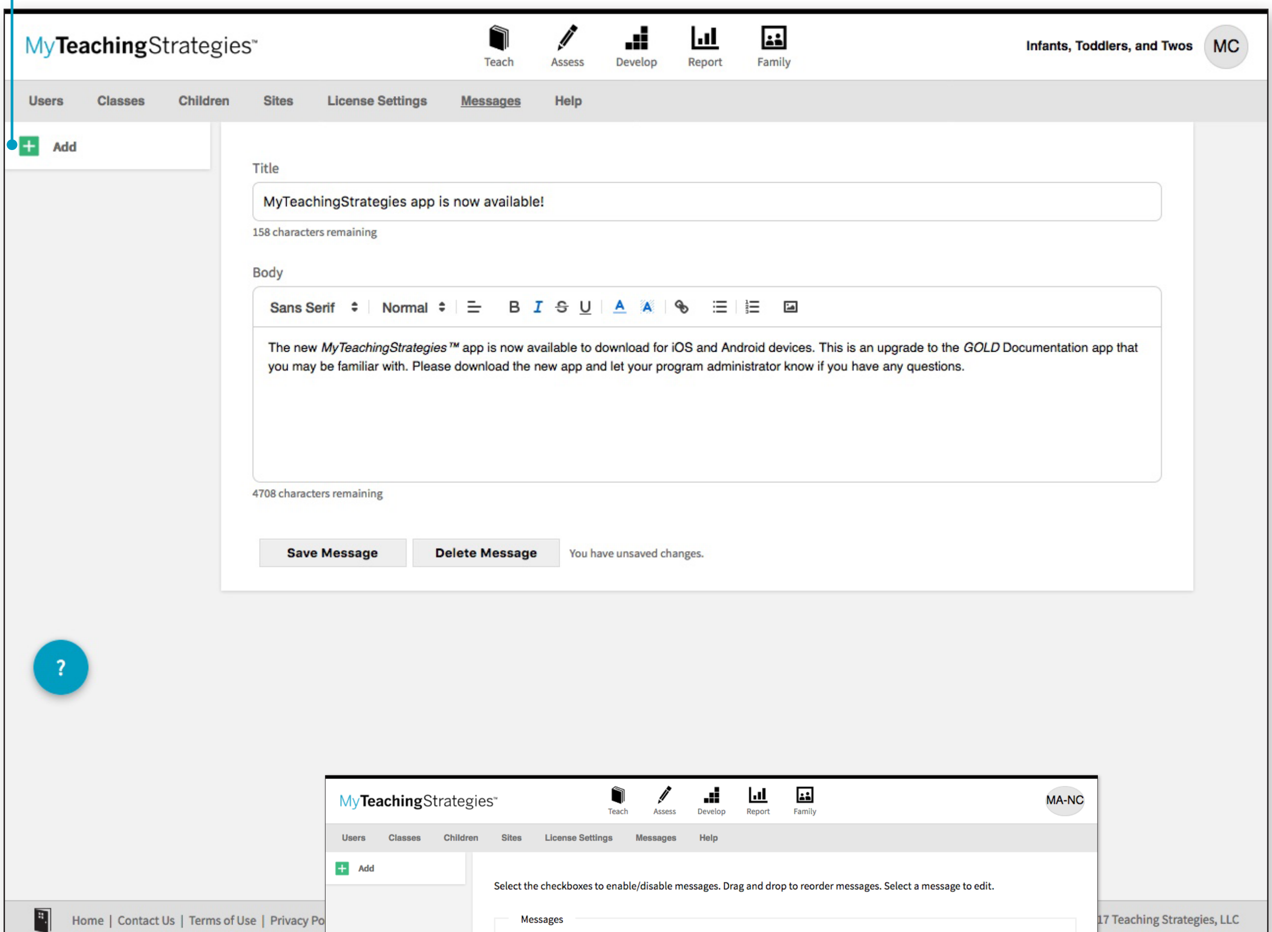


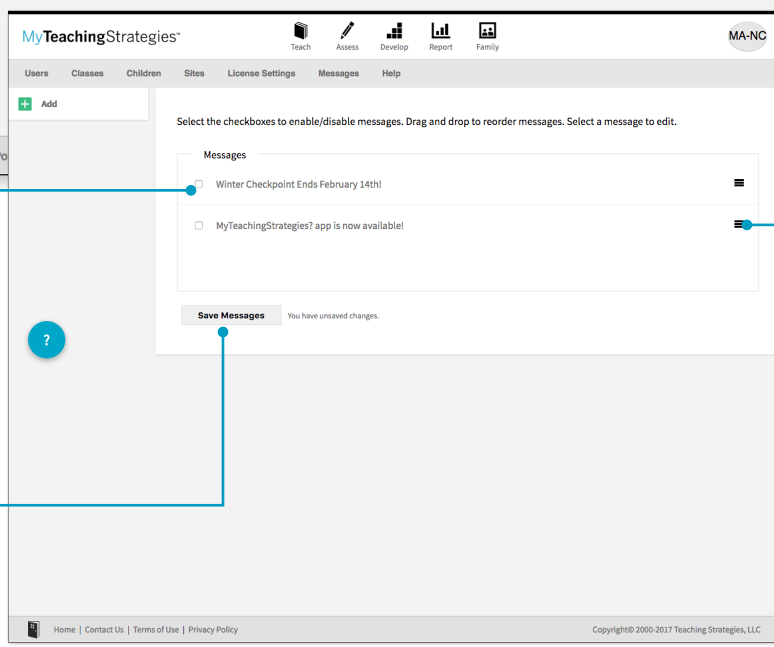
3. Select UPDATE USER ALLOCATIONS. All users with allocated course credits will then be able to access credit-bearing courses in My Courses in the Develop area.

Messages

The Messages area enables you to share personalized messages with your program(s).

1 To add a new message, select ADD from the left-hand navigation.





2 Select a message to edit the message.

3 You can customize the order in which messages appear by dragging and dropping the messages into your desired order.

4 Select SAVE MESSAGES.

MyTeachingStrategies™

Teach

To access the Teach area, select the book icon from the main navigation bar.

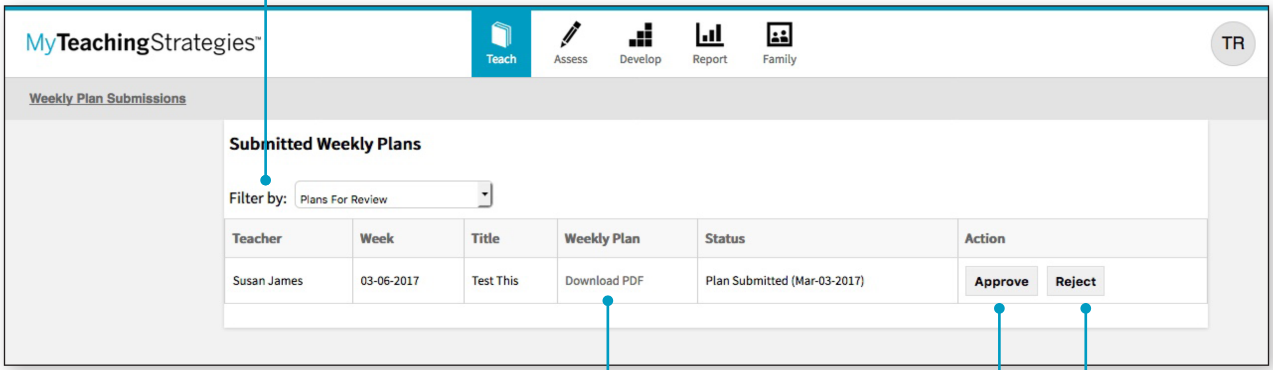
Administration Handbook

Reviewing a Submitted Plan

As an administrator, you can view weekly plans submitted by the teachers in your program.

To view a submitted plan, select WEEKLY PLAN SUBMISSIONS from the Teach area sub-navigation.

Use the Filter by drop-down menu to view your PLANS FOR REVIEW, APPROVED PLANS, or REJECTED PLANS.



To review a submitted plan, select DOWNLOAD PDF from the Weekly Plan column.

Select APPROVE to approve the plan or REJECT to reject the plan. If approved, the plan will be marked as Approved in the teacher's account. If rejected, the teacher will receive a message on his or her Dashboard. The plan will be marked as rejected and the teacher will be able to resubmit the plan.