



MyEducationBC

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# Journals

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April 2019 v2.1

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## Version History

Version	Date	Description
1.0	12 Sep 2014	Initial document
2.0	23 May 2017	Update for 5.6 screenshots and minor changes throughout, Expiration and Type added, Delete on Transfer removed
2.1	25 Apr 2019	Added hyperlinks to Table of Contents

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## 1.0 Introduction to Journals for Students

Journals in MyEducation BC allow staff to keep notes for students related to a wide variety of needs. These can be shared amongst staff and have the ability to be marked for deletion or for a future follow up. Journal entries are not accessible in the student or family portals.

## 2.0 Creating a Student Journal Entry

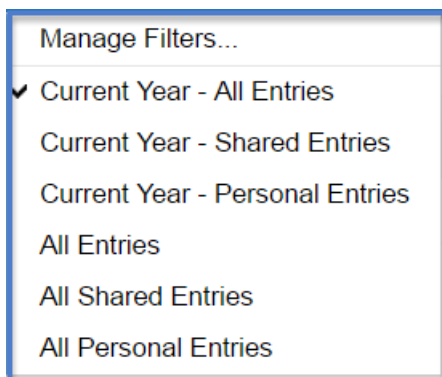
Currently the baseline security roles allow for school administrators, clerical – school admin assistants, and counsellors the ability to create journal entries and edit their own entries; while teachers, including student services have read access to those entries identified as public. Entries not checked as public can only be viewed by the individual who created the entry.

### 2.1 Accessing the Journal

To create a journal entry, check the box to select the student from the **Student** top tab and then click on the **Documents** side tab.

Click on the **Journal** sub-side tab. At this point you can review / revise / delete presented entries, filter for entries or add an entry.

Filter the presented entries by selecting the filter tool.



From the list of journal entries screen, previous entries can be opened by clicking on the Date link. Clicking on the Comment link will open a popup of the comment only.

To create a new entry use **Student > Documents > Journal > Options > Add**.

## 2.2 Completing the Journal Entry

Within the journal entry form the user is provided with fields offering pick lists as well as those for free text entry.

## 2.3 Managing Student Journals

The fields provided in the student journal template allow for filtering and querying. This assists with the management of student records.

### 2.3.1 Fields of particular note within the journal template

- **Journal Type:**

Journal Type has pre-defined selections from the Enterprise reference table for use in filtering and querying: **Call, Email, Meeting and Other**. Districts may also create their own reference codes.

- **Expiration Date:**

Some journal entries may be intended to be kept with the student, whereas others may only be meant to be kept for the time a student remains at the current school, or for a school year. Districts or schools that do not wish to have student Journal Entries travel to another school or the next school year, can choose to have these entries set to expire.

All Journal Entries with an expiry date that is on or before EOYR will be deleted when the Enterprise job is run to remove expired Journal Records.

Topic	Sample Journal - meeting
Date *	19/05/2017
Time *	2:59 PM
Duration in minutes	20
Security Level	
Expiration Date	30/06/2017

- Is Public**

Checking this option for a journal entry allows all staff who have access to the student, the ability to view, not edit the record. Not checking this option keeps the note private only to the staff member who created the record. From the journal list for an individual student, the Public field indicates the setting for each entry.

Type	Meeting
Reason code	Post-secondary planning
Reporter's name	Ms. Principal
Reporter Type	Vice Principal
Author's name	Ms. Principal
Author Type	Vice Principal
Is public?	<input checked="" type="checkbox"/>

- Follow up and Completion Date**

The follow up code, follow up date and completion date are fields that can be queried and filtered. These fields can be useful when follow up on an issue is intended. For example; by setting a follow up code to *Needed*, with a blank completion date users can query for those records still requiring attention. **Global > Student > Student Journal > List > Options > Query**

**New Query** Simple Mode

Tables	Student Journal	
Fields	<div style="border: 1px solid #ccc; padding: 5px;">                 Follow-up code                  Referral code                  Is public?                  Comment                  Follow Up Date                  Completed Date             </div>	<input type="button" value="And"/> <input type="button" value="Or"/>
Operator	Is empty	
Value		
Search criteria Follow-up code Equals Needed And Completed Date Is empty		
<input type="button" value="Delete"/> <input type="button" value="(-)"/>		
Search based on Current Year - All Entries		
<input type="button" value="Search"/> <input type="button" value="Cancel"/> <input type="button" value="+ New"/> <input type="button" value="Save As..."/> <input type="button" value="Select..."/>		