



MyEducationBC

Journals

June 2021 v2.5

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
2.2	13 Apr 2020	Minor edit of the document
2.3	20 Apr 2020	Updates throughout the document to match existing functionality
2.4	07 May 2020	Clarifications on functionality throughout the document
2.5	17 June 2021	Clarification added to section 2.0

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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 enable **school administrators, clerical – school admin assistants, counsellors** and **teachers** to create journal entries and edit *their own* entries; student services have read access only to entries marked public. Entries not marked public are only visible to the individual who created the entry.

2.1 Accessing the Journal

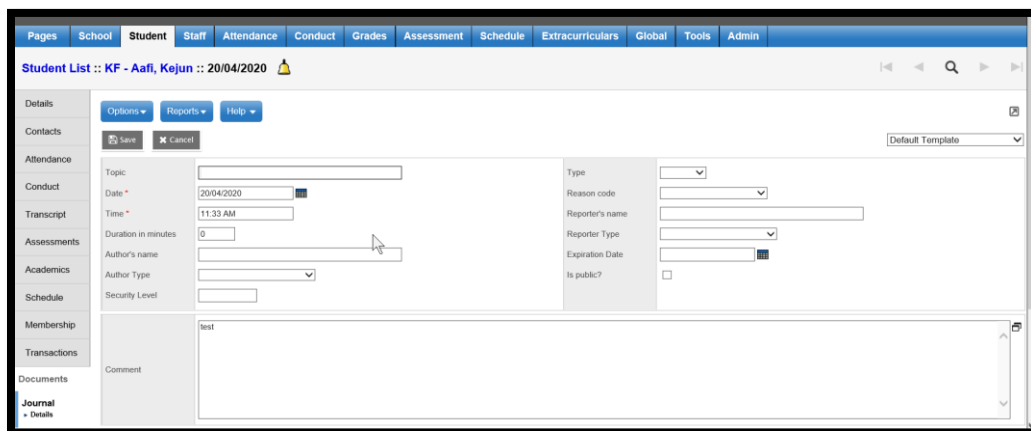
Student journals are available from multiple areas in the system; different functionality will display depending on the location.

2.1.1 Accessing from Student Top Tab

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. All journal entries display for the selected student. Depending on access rights, users can:

- view / review / revise / delete presented entries;
- filter for entries; or
- add an entry.



From the list of journal entries screen, existing journal 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 TT > Documents ST > Journal > Options > Add**.

2.1.2 Accessing from School Top Tab

To create a journal entry, select **School** top tab > **Journal** side tab. The user can view / review / revise / delete presented entries; filter for entries; or add an entry.

Notes:

- Some fields available from Student top tab are not available here.
- Edits to existing journals created by other users may be done **in this screen only**.
- Secondary student journal entries may also be edited here. However, to maintain historical accuracy, communicate with the primary school before adjusting a non-primary student record.

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

To create a new entry use **School TT > Journal ST > Options > Add**.

2.1.3 Accessing from Staff view > Student Top Tab

To create a journal entry, select **Staff View > Student** top tab and then click on the **Documents** side tab.

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

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 **Staff View > Student TT > Documents ST > Journal > Options > Add.**

Note: This screen contains the same fields as School view > Student top tab.

2.1.4 Accessing from Global top tab > Student or All side tab

Users with access to the Student Journal tables in the Global top tab can use this functionality to groom the list of entries.

To access a journal, select **Global** top tab > **Student** or **All** side tab. Select **Student Journal** table.

User can view / review / revise / delete presented entries, filter for entries or add an entry.

3.0 Managing Student Journals

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

3.1.1 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.

The screenshot shows a form with the following fields and values:

- Type: Meeting (dropdown menu)
- Reason code: Post-secondary planning (dropdown menu)
- Reporter's name: Ms. Principal (text input)
- Reporter Type: Vice Principal (dropdown menu) rcdCode; rcdDescription
- Author's name: Ms. Principal (text input)
- Author Type: Vice Principal (dropdown menu) rcdCode; rcdDescription
- Is public?:

- **Expiration Date:**

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

All Journal Entries with an **Expiration Date** that is on or before the scheduled EOYR date, will be deleted when the Enterprise job is run to remove expired Journal records.

The screenshot shows a form with the following fields and values:

- Topic: Sample Journal - meeting (text input)
- Date: 19/05/2017 (calendar icon)
- Time: 2:59 PM (text input)
- Duration in minutes: 20 (text input)
- Security Level: (text input)
- Expiration Date: 30/06/2017 (calendar icon)

- **Is public?**

Checking this option for a journal entry allows all staff who have access to the student, to view journal entries for that student. Not checking this option keeps the note private, only visible 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.

Note: School Admin can see *all* the journals created by a teacher, regardless of the selection in the **Is public?** field.

A screenshot of a web form. The fields are: 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), and Is public? (checked). The 'Is public?' field is highlighted with a red box.

- **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 required. For example, using a follow up code of *Needed*, with a blank completion date will enable users to query for those records still requiring attention. **Global > Student > Student Journal > List > Options > Query**

A screenshot of the 'New Query' interface. It shows a search criteria table with the following content:

Tables	Fields	Operator	Value
Student Journal	Follow-up code	Is empty	
	Completed Date		

The search criteria are: Follow-up code Equals Needed And Completed Date Is empty. The interface also includes buttons for 'And', 'Or', 'Delete', and '(-)'. At the bottom, there are buttons for 'Search', 'Cancel', 'New', 'Save As...', and 'Select...'.

4.0 Filters

Select the filter tool from **Student Top Tab > School Top Tab > Staff View** to display a list of available filters.

A screenshot of a filter selection menu. The options are: Manage Filters..., Current Year - All Entries (checked), Current Year - Shared Entries, Current Year - Personal Entries, All Entries, All Shared Entries, and All Personal Entries.

- **Current Year – All Entries** - current year records only
 - All records Created by this user
 - OR are marked as *is public*?
 - OR are created by a teacher in the Staff view (all staff view entries are visible to administrators in school view)
- **Current Year – Shared Entries** – current year records only that are marked public
- **Current Year – Personal Entries** - all records created by the user in the current year
- **All Shared** - all records marked public
- **All Personal** - all records created by the user
- **All Entries** – all years
 - All records Created by the user
 - OR are marked as *is public*?
 - OR are created by a teacher in the Staff view (all staff view entries are visible to administrators in school view)

Note: In Staff view, personal (not-public) entries are not visible to other staff.