



MyEducationBC

Journals

March 2023 v2.6

Version History

Version	Date	Description
1.0	Sep 2014	Initial document
2.0	May 2017	Update for 5.6 screenshots and minor changes throughout, Expiration and Type added, Delete on Transfer removed
2.1	Apr 2019	Added hyperlinks to Table of Contents
2.2	Apr 2020	Minor edit of the document
2.3	Apr 2020	Updates throughout the document to match existing functionality
2.4	May 2020	Clarifications on functionality throughout the document
2.5	Jun 2021	Clarification added to section 2.0
2.6	Mar 2023	Added a new section 2.2 – Copy Journal entry from selected student procedure

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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

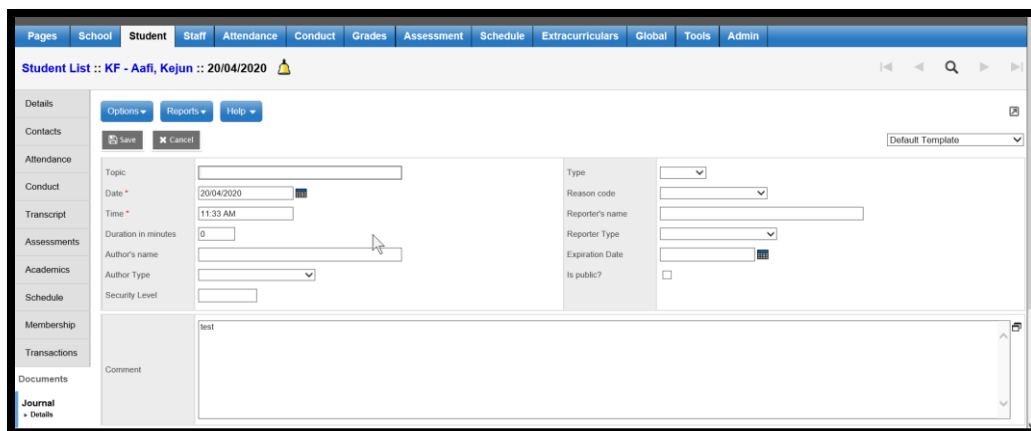
Student journals are available from multiple areas in the system; different functionality will display depending on the location.

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.

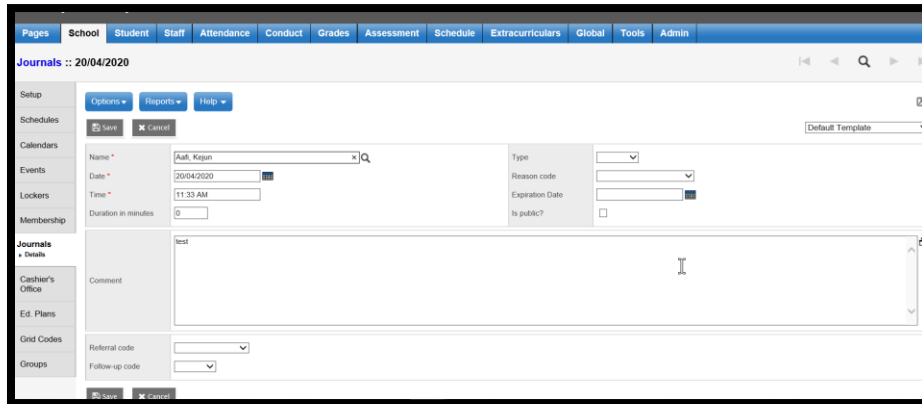


From the list of journal entries screen, existing journal entries can be opened by clicking on the Date link. Clicking on the Comment link will open a popup of the comment only.

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.

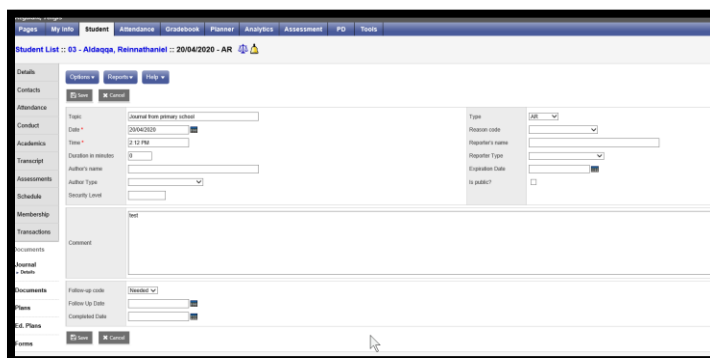
From the list of journal entries screen, previous entries can be opened by clicking on the Student name link. Clicking on the Comment link will open a popup of the comment only.

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.

2.2 Copy Journal Entry from Selected Student Procedure

The Copy Journal Entry From Selected Student procedure will copy a previously created student journal to all the students in a selected snapshot. Snapshots can be created at the School and Staff view, and the level determines the ownership of the snapshot.

Note: In Staff view the students in a snapshot are limited to the students the teacher has access to e.g., students also available in the ‘Students in My Classes’ and ‘Students in My Homeroom’ filters. A snapshot is different from a filter. Where a filter is dynamic and always returns the latest data, a snapshot is a static list. It always displays the same records unless it is manually edited. Only the user who created the snapshot can add or remove students from it.

Details on Snapshots are found in the **Snapshots** section of the **Fundamentals** guide located on the MyEducationBC.info site.

2.2.1 Navigation: Copy Journal Entry From Selected Student Procedure

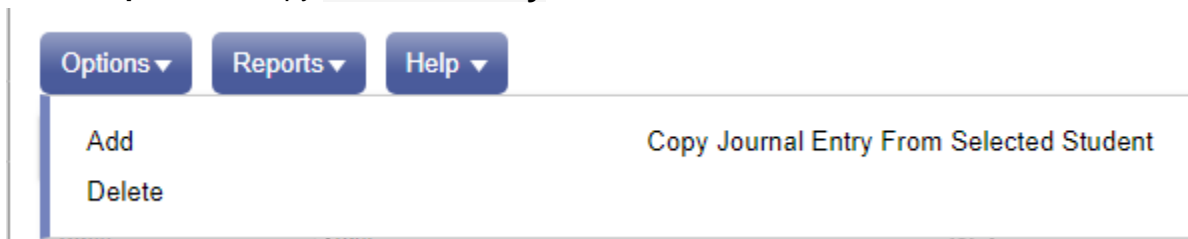
The **Copy Journal Entry From Selected Student Procedure** is run the same way in School, and Staff views from the following paths.

School View: Student Top tab > Documents Side Tab > Journal > Select and click into an existing journal detail for a student > Options > Copy Journal Entry From Selected Student

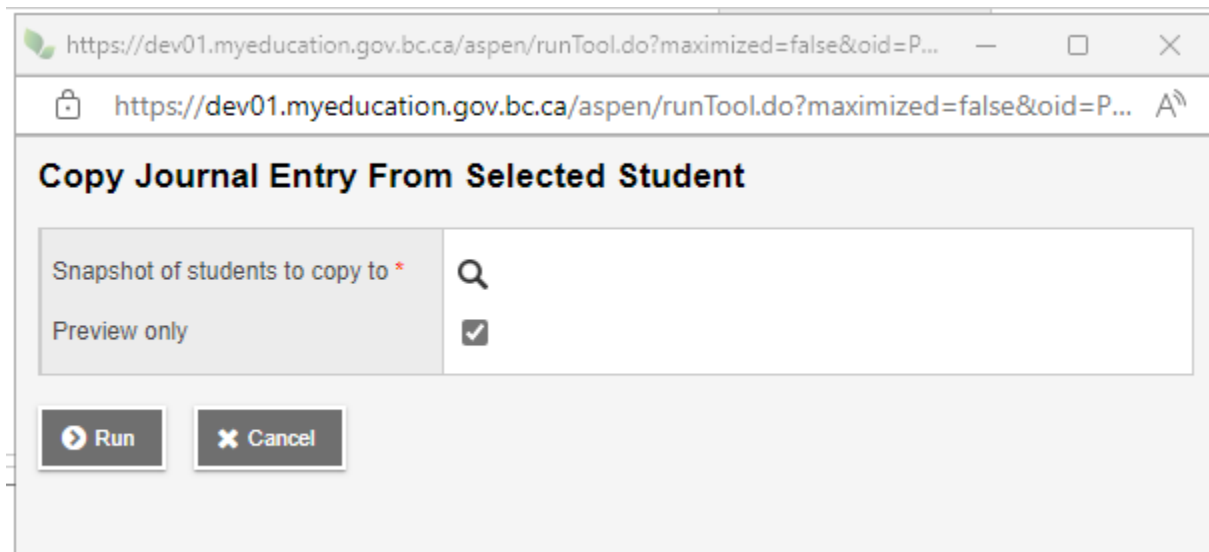
Staff View: Student Top tab > Documents Side Tab > Journal > Select and click into an existing journal detail for a student > Options > Copy Journal Entry From Selected Student

Following are the steps to copy a procedure from **school/Staff view**

1. Click **Student** top tab > Select a Student > **Documents** side tab > **Journal**
2. Click into the **Journal details** for the selected student
3. **Options** > Copy **Journal Entry** from Selected Student



In the pop up, fill in the parameters for the copy procedure



Note: Snapshot ownership determines which users can see which snapshots.

Field	Description
Snapshot of students to copy to	Select the student snapshot (created above). The snapshot contains the students that will receive a copy of this student journal in their Journal side tab.
Preview	<p>Checked: It will be checked by default and provides the opportunity to confirm the settings in the parameter screen are correct. Results message is displayed giving the user information to adjust the settings or snapshot.</p> <p>Un-Checked: Runs the copy procedure and creates journals for the students in the snapshot</p> <p>Note: It is highly recommended to run the copy procedure in Preview mode first to confirm details before creating multiple Plans</p>

When the Procedure is run in either Preview or copy mode, a results message pop up displays to confirm the details of the run.

Note: It is highly recommended to **run the copy procedure in Preview mode first** to confirm details and results before creating multiple Plans.

2.2.2 Copy Journal Entry From Selected Student Procedure Results

Here is a sample log message and the list of Business Rules that apply to the Copy Journal Entry Procedure.

Log Message

```

Messages
=====

Number of students selected for Journal entry creation : 4
Number of Journal entry created :4
Number of Journal entry skipped :0
Following is the list of students skipped :
The remainder of the skipped students are not in a class or homeroom taught by
this teacher
    
```

List of Business Rules and Error Messages

No.	Business Rule	Error Message
1.	If Student does not have an active enrollment status – skip student	Student does not have Active status
2.	If student is not primary at the School running the procedure – skip student	Student is not primary to the selected school

3.	Staff View – If students included in the snapshot selected are not in a section or homeroom taught by the teacher – skip student	The remainder of the skipped students are not in a class or homeroom taught by this teacher
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Note: In Staff view the students in a results file are limited to the students the teacher has access to e.g. students also available in the ‘*Students in My Classes*’ and ‘*Students in My Homeroom*’ filters.

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

- **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
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, 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 with the following fields:

- Type: Meeting (dropdown)
- Reason code: Post-secondary planning (dropdown)
- Reporter's name: Ms. Principal (text input)
- Reporter Type: Vice Principal (dropdown) with a link to rcdCode; rcdDescription
- Author's name: Ms. Principal (text input)
- Author Type: Vice Principal (dropdown) with a link to rcdCode; rcdDescription
- Is public?: (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 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 in 'Simple Mode'. It shows:

- Tables: Student Journal
- Fields: Follow-up code, Referral code, Is public?, Comment, Follow Up Date, Completed Date
- Operator: Is empty
- Value: (empty)
- Search criteria: Follow-up code Equals Needed, And Completed Date Is empty
- Search based on: Current Year - All Entries
- Buttons: Search, Cancel, New, Save As..., 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 with the following options:

- Manage Filters...
- Current Year - All Entries
- Current Year - Shared Entries
- Current Year - Personal Entries
- All Entries
- All Shared Entries
- 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.