Perkins Plan Approval Process
Navigating ED STEPS

OFFICE OF CAREER-TECHNICAL EDUCATION

SEPTEMBER 2022

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Accessing ED STEPS Perkins Plan

1. Access the **Ohio ID Portal** using your **OH|ID Account**.
2. The district contact must have the Ohio Education Directory System (OEDS) role superintendent, superintendent designee, or treasurer to access the ED STEPS Perkins plan at the Career-Technical Planning District (CTPD) level.
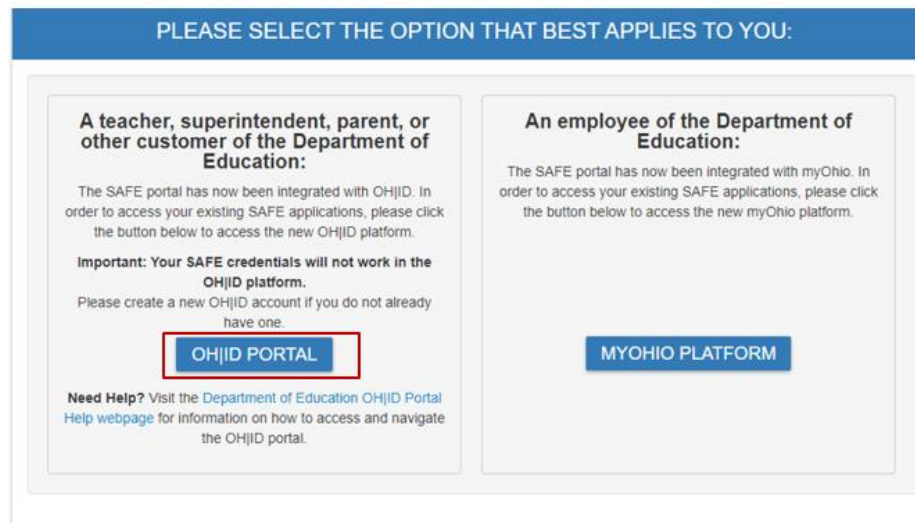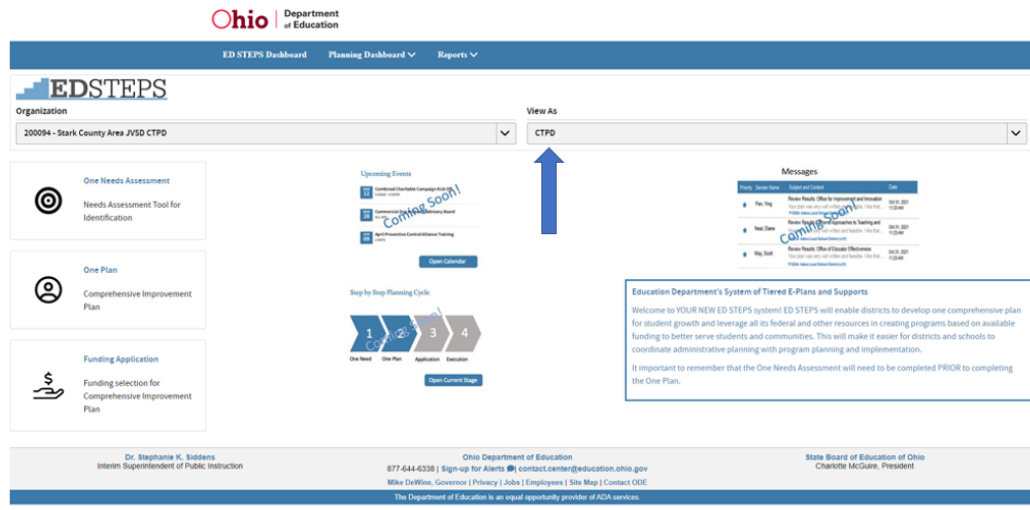

3. Select the **ED STEPS** tile to enter the new **ED STEPS** system.
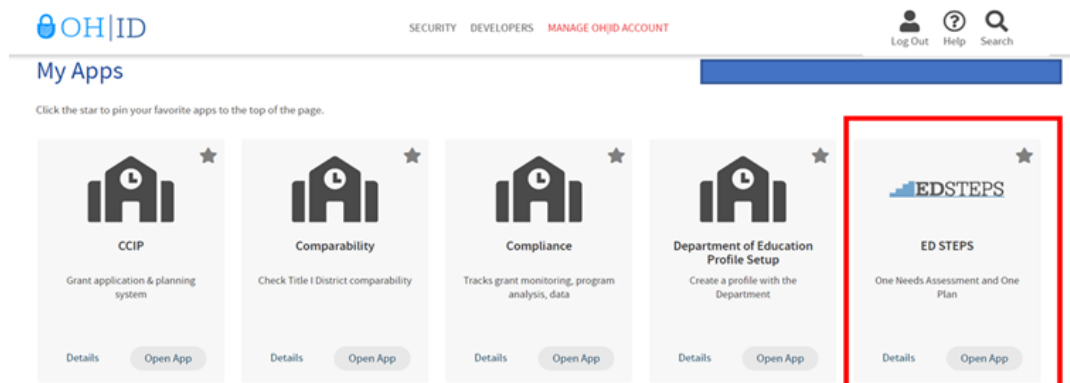
4. Next, enter through the **Planning Dashboard** for ED STEPS. This page has access to the Perkins Plan, the One Needs Assessment, the districts One Plan and Comprehensive Continuous Improvement Plan (CCIP).

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5. To view the Perkins Plan, select from the drop-down menu, **View As** CTPD.

6. From the **Planning Dashboard**, select **Create/View Plan** to review the Perkins plan status.

Understanding the Progress Bar

The plan status bar will highlight where the entire plan is in the process.

1. **Plan in Progress:** The in-progress status is the beginning process, allowing the recipient to edit the Perkins plan.

Plan Status

| Plan In Progress | Plan Submitted | Plan Approved For Auth | Plan Approved For Agency Review | Plan Agency Approved | Plan Archived |

2. **Plan Submitted:** The plan is submitted to the treasurer for approval.

Plan Status

| Plan In Progress | Plan Submitted | Plan Approved For Auth | Plan Approved For Agency Review | Plan Agency Approved | Plan Archived |

3. **Plan Approved for Authorization:** The treasurer has approved the plan and is pending the final superintendent's approval.

Plan Status

| Plan In Progress | Plan Submitted | Plan Approved For Auth | Plan Approved For Agency Review | Plan Agency Approved | Plan Archived |

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4. **Plan Approved for Agency Review:** The superintendent has approved the plan. The Perkins plan is no longer with the career-technical planning districts and is pending the Department of Education review.

Plan Status

Plan In Progress	Plan Submitted	Plan Approved For Auth	Plan Approved For Agency Review	Plan Agency Approved	Plan Archived
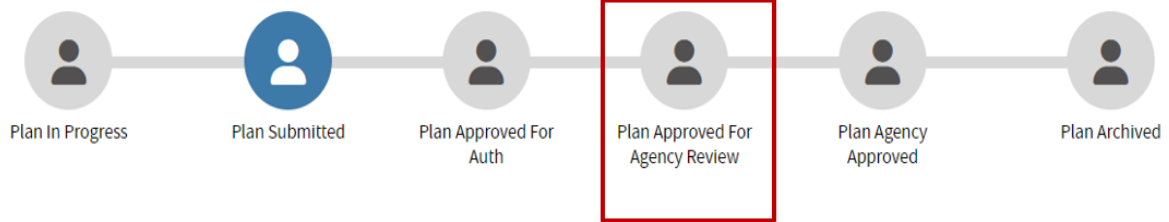
5. **Plan Agency Approved:** The department approved the Perkins plan without further edits.

Plan Status

Plan In Progress	Plan Submitted	Plan Approved For Auth	Plan Approved For Agency Review	Plan Agency Approved	Plan Archived

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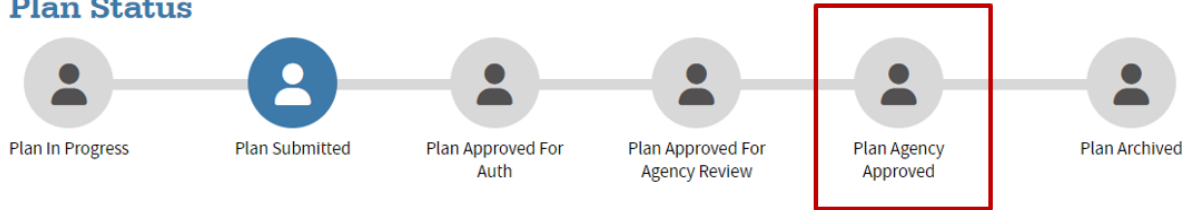
Approval Process

1. From the Planning Dashboard drop-down menu, select **Approve Plans** to begin the approval process. The screen should look like the images below. The plan status must be in **Progress** before the treasurer can view the plan for approval. **Note:** The superintendent cannot begin the approval process until the treasurer submits the Perkins plan for review.

2. Select **Approve** to send to the superintendent for final approval, or select **Return** for additional edits.

3. The superintendent's submission of the Perkins plan completes the final process unless your assigned consultant returns it for edits.

Approve Plans View

Agency Review Rejected Plan

1. If the plan is returned for revisions, the Perkins recipients must unlock the plan to make the necessary edits.

2. Review the recommendation noted in the rubric for guidance. In some cases, the consultant will include a note in the EdMail message page.

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History Log and EdMail Message Page

The ED STEPS system has an internal message and status change tracking system. The History Log system keeps track of status changes to the plan. When the Perkins plan status changes, an email will go to the individuals associated with the Perkins plan. Districts can reply to the email and post comments with the original email.

To monitor the Perkins plan status, select from the Planning Dashboard menu to view the History Log and EdMail communications.

History Log View

EdMail View

Browser Troubleshooting Steps

Step 1: Check OEDS Roles. Make sure the assigned Perkins recipient OEDS roles are at the career-technical planning district level.

Step 2: Try different browsers such as Chrome, Edge or Firefox. Also, try clearing cookies in Chrome. Suggest checking for updates to the browser and clearing the cookies and cache.

How to clear Cookies and Cache for Most Browsers

1. Click the Tools menu (three dotted lines in the upper-right corner).

2. Select History.

3. Select Clear Browsing Data from the left-hand side. Set the Time Range to All Time.

4. If using a Windows computer, close and re-open Chrome to save your changes.

Step 3:

1. Assess if the plan was submitted from the Comprehensive Local Needs Assessment (check Pre-Planning tab) to the Perkins Plan.

2. Assess if each <u>goal</u> is in "completed" status. Look for green checkmarks on the plan review page or status on the create/view page. Edit any incomplete section to achieve the green checkmark.

3. If there is a "grayed" area, that means a validation has been implemented for a correction or missing part. The one plan will not allow you to move forward or complete/submit until all validations are met.

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