

Accessing the Web EPSS (after accepting the invitation)

Login to Web EPSS through the Pilot Website

Online 

1. Go to <http://web-epss.ped.state.nm.us/Security/Login.aspx>
2. Enter your *email as the User Name* and your *Password*. Note that passwords are case sensitive.
3. Select your District name to go to your LEA Overview page .

Adding Team Members to Web EPSS (Administrators)

Offline 

1. Identify the people that will help to implement the District's *Web EPSS*.
2. Make a list of first names, last names, and email addresses

Online 

3. Login to *Web EPSS* (see above).
4. Select the **Setup and Maintenance** link (at the top-right), then select Users from the left navigation list. Check to see who is already assigned from your District. Click on Add a Contact under the list to add new Users to your *Web EPSS*.
5. Enter the required information, indicated by *, for the first individual on your list and then press **Save**. The Entity Type filter should be District, and your district name should appear in the Entity drop down list. You may also add additional contact information, such as position, department, and phone number for each User.
6. Repeat steps for each team member to be added.
7. Once you click Save for each Contact added, they will receive an email from *Web EPSS* with an invitation code and instructions to login to *Web EPSS*.

Return to Your District EPSS

Use the links in the top navigation bar to return to your LEA Overview or go directly to your Monitoring Instrument or Plan page.

The Plan Overview page will show you a collapsed view of your Plan, with the pre-loaded seven required Goals to address. Click on **Expand Outline** to see the parts of you plan that need to be completed.

Entering and Implementing your District EPSS

Step One-- Build your Plan

1. Login to the *Web EPSS*, click on your District name, and go to the Plan Overview link in the Improvement Plan box.
2. Select the **Goal Name** to link to each Goal to the Improvement Plan; one at a time. Select the Goal name from the list of all goals, enter your Strategic Objectives in the last text box, and click Save.
3. For each Goal, input two or more Strategies by selecting **Add Strategy** next to the Goal title, and entering a title and description. Click Save.
4. Next to the Strategy name in the Overview, click to *Add Action Steps* for each Strategy. The fields with * are required, though all fields are recommended, if appropriate. Click Save and you will be able to add Person(s) Responsible for implementing the Action Step. Check as many as are appropriate, and click Save. This will take you to the Action Step Overview page. Click on the Tasks tab to add specific tasks to your Action Step. The Action Step Overview is also where you update the Status as you implement the Step, and where you designate the Budget for the Step: Funding source(s) and Amount(s).

Step Two--Build the Budget

1. From any page in the Plan, select the Budget link under the top navigation bar.
2. Select *Add or Edit Funding Source* to record each funding source and select the appropriate source from the pull-down menu. NOTE that there is a pull-down menu to select the Year for funds. If you are using carry-over funds from last year, select 2008-2009. If you are designating new funds, select 2009-2010. Enter the total amount available for your Plan in the text box and click Save.
3. Repeat step 2 for each funding source.
4. You will see your Budget develop with the Total Allocations, Budgeted, Actual and Balance for each Source. As you add Budget amount to Action Steps, and record the Actual expenses, the totals will be reflected on this Budget page.

Step Three--Add Details and Update Status of Action Steps

From the Plan Overview, click on the name of an Action step to see the Step Overview, and:

1. Add *Budget Allocations* and *Actual Amounts* for each step requiring funding.
2. *Update the status* of Action Steps: Not Begun, In Progress, Completed, Retired, or Suspended. Write a comment or description of what has taken place so far, next steps, or results of Action Step implementation. These *Status Updates* are used to track the overall progress of implementing and achieving your EPSS.
3. Share your progress with *Reports* of your Web EPSS by Expanding or filtering the Plan Overview and creating a *View/Print PDF* capture of your EPSS throughout the implementation.