Reviewing External Credit Requests

When a staff member submits an out-of-district course for salary credit approval via an **External Credit Request** in the PL Essentials system, their administrator is the first-level approver. This was previously done by obtaining the administrator's signature on the hardcopy Prior Approval Form.

When a staff member at your site submits an External Credit Request, you will receive an auto-email notification from the system alerting you. You can also check at any time to see if you have requests pending your approval by entering the PL Essentials system and checking your approval queue.

Please be sure to **review staff requests on a regular basis** and either approve or deny them in a timely manner. The request is **not** considered received by the Curriculum and Professional Learning Department, and the 20 working-day processing timeline for an External Credit Request does not begin, until the administrator has approved the request for the staff member.

When reviewing External Credit Requests for staff, please consider the following:
- Is the content of the course appropriate?
- Does the course relate to the staff member's current position or Credential(s)?
- For Certificated staff, how are they linking it to the CSTPs?
- For Classified staff, how does the course apply towards their current position, or towards a degree they are pursuing?
- Does the course occur during the staff member's off-contract time (required)? Or, if the staff member is Classified, are they using approved vacation/CTO time to attend the course?

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Accessing External Credit Request Review Tools

To manage External Credit Requests from your staff, select **External Credit Request** from the main navigation bar tabs along the top of the PL Essentials homepage.
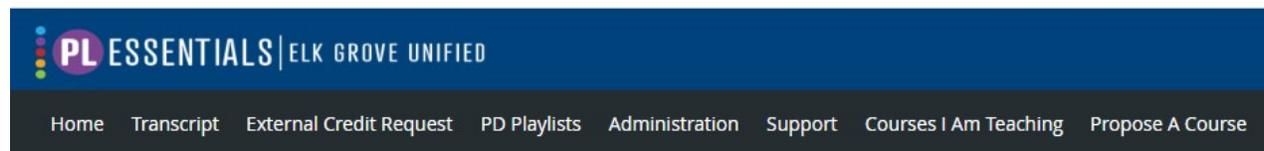
> 📝 **Note:** Alternatively, you can select **Administration** in the tabs along the top of the homepage, then select **External Credit Requests** from the Applications menu

The **Manage Requests** screen appears and includes the following features:

A. **Menu Options**: Select an option from the menu to navigate to the selected page. The page is defaulted to open at "Manage Requests", which is the screen you need to be in to review requests.

B. **Approval Types**: Select the drop-down for approval types and then click **Select** to filter the results by approval type. The default is set to display All Approval Types. You can narrow by Certificated or Classified requests if you choose to.

C. **Add Filters**: Use filters to narrow the results if you choose to. By default, the filter to display non-archived requests only is already set. To make it easier to find your pending requests, you will be adding one more filter. Directions are in the next section of this guide.

D. **Action Menu**: Select this to view, delete, or archive a request. As the first level approver, you will only ever be using "view", you should not use "archive" or "delete".

E. **Status:** Existing credit requests to which you have permissions are listed, each with a status indicator. Status options include:

○ Approved: The credit request has been successfully approved by both levels of approvers.

○ Pending: The completed course's credit request is awaiting approval.

○ Pending Pre-Approval: The credit request is in the process of being approved by one or more levels of approvers.

○ Denied: The credit request has been denied.

F. **Course/ Event Title**: Select this to proceed to review and approve/deny the request.

Review Pending External Credit Requests

1. Start at the **Manage Requests** screen.
2. Click "Add Filter" on the right-hand side of the screen.
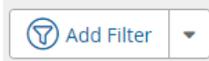
3. You will see there is already an existing filter removing all archived requests. Do not edit that filter. Underneath that line is where you will enter the information to add a new filter.
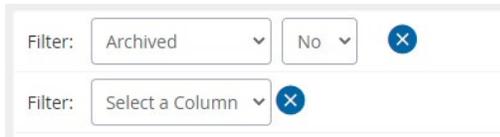
4. Starting with the "Select a Column" drop down, set your filter to the following, and click "update table"
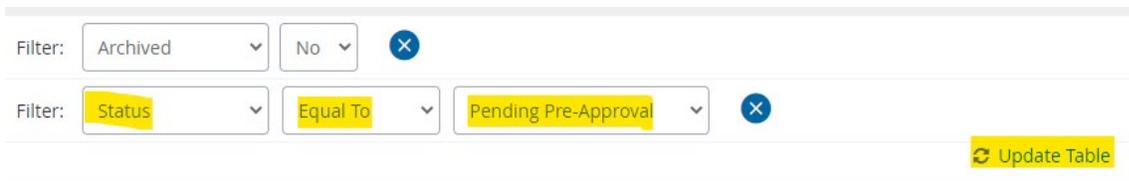
5. The requests screen will now only display requests that are pending one or more levels of approval.
   - If the request is pending your approval at the first level, the requesting staff member's name will still be listed under the "Updated By" column, as they were the last user to update the form. These are the requests that need your attention.
   - If you have already approved a request at the first level and the request is now in CPL's second level approval queue, your name will be listed under the "Updated By" column. These requests no longer need your attention.

6. Locate the staff member's credit request that you wish to review.
7. Click the **course title** to view the request, or select the actions menu to the left of the title and status and select **View**.
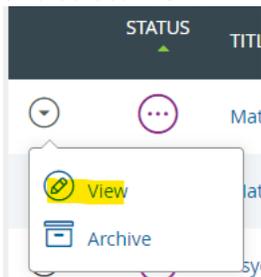
8. Review the form and the content of the course (there will be an attached course description for you to review), and on Classified staff's forms approve or deny any requested vacation/CTO time (for Classified staff who are requesting it only).
9. If you are approving the content of the course for the staff member select **Approve**. If you do not approve the content of the course, or you are requesting more information from the staff member before approving, select **Deny**.
10. A submission form will pop up. If you are denying the course or requesting more information from the staff member before approving, please be sure to include a note on the form. Next, select **Submit.**
11. If the course is denied, a notification is sent to the staff member. If the course is approved, it moves on to the approval queue of the Curriculum and Professional Learning Department, where is it then officially considered as "received" from the staff member, and the 20 working-day processing timeline begins.
12. If the course is approved by CPL, there is no further action needed on your part. If the course is denied by CPL, then if/when the staff member resubmits the form it will reappear in your pending approval queue, and you will need to review it at the first level again.

<u>Where to Get Support</u>

If you have any questions or issues that this user guide does not cover, please see below.

- If you are having technical issues **logging in to PL Essentials via the EGUSD ClassLink Portal**, or if you think you are **not correctly set up as a first level approver** in PL Essentials, please contact the Technology Services Department help desk.

- If you have any questions on the **basic navigation and usage** of the PL Essentials system, please contact the Curriculum and Professional Learning Office.

- For any questions, or if you need **additional guidance in reviewing External Credit Requests**, please contact the Curriculum and Professional Learning Office.

- Additional information on **EGUSD Professional Learning policies and procedures** can be found in the PLAC handbook (for Certificated staff), the JETA handbook (for Classified staff), and the CPL FAQ, all found on the [Professional Learning website](#).

- The PL Essentials system also has a built-in product information help section. To access this, click the question mark button located at the top right-hand side of the PL Essentials homepage.