

Utah Consolidated Application

Training Module 1 Overview & Getting Started



(9-9-09)

Overview of Training Modules

The Utah State Office of Education (USOE) has prepared this series of training modules to assist local education agencies (LEAs) as they complete the new Utah Consolidated Application (UCA) process. They are intended to serve as step-by-step guides. LEAs may find it helpful to either download these materials for review or to use them on a companion computer while working on the UCA system.

Each UCA training module includes an index at the beginning if LEAs want to review materials on a specific topic. The USOE has developed four modules in this series:

- Module 1: Overview & Getting Started
- Module 2: Planning Tool
- Module 3: Funding Applications
- Module 4: Grant-Specific Components & Submission

Training Module 1

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**Message from
Dr. Larry Shumway
State Superintendent of Public Instruction
Utah State Office of Education**

Hello. I'm Larry Shumway, and it is my pleasure, as the State Superintendent of Public Instruction for Utah, to welcome you to this training module.

I'm pleased to introduce you to the new Utah Consolidated Application process. This web-based grants management system replaces the old Consolidated Utah Student Achievement Plan or CUSAP.

We believe that the new Utah Consolidated Application (UCA) will support quality continuous improvement planning efforts for districts and charter schools by aligning identified needs with goals, strategies, and funding.



**Message from
Dr. Larry Shumway
State Superintendent of Public Instruction
Utah State Office of Education**

Promises to Keep - Vision

Utah's Public Education System is created in the State Constitution to "secure and perpetuate" freedom. In order to secure and perpetuate that freedom, public education must prepare future generations in ways that require:

- Citizen participation in civic and political affairs;
- Economic prosperity for the community;
- Strong moral and social values; and
- Loyalty and commitment to constitutional government.



**Message from
Dr. Larry Shumway
State Superintendent of Public Instruction
Utah State Office of Education**

Promises to Keep - Mission

As the citizens of Utah entrust resources for public education, educational leaders must be clear with the citizens of Utah regarding specific core promises. These promises are made as part of the civic compact regarding resources and the public should have high expectations of success in the work of public education in these promised areas. Utah's Public Education System keeps its constitutional promise by:

1. Ensuring literacy and numeracy for all Utah children;
2. Providing high quality instruction for all Utah children;
3. Establishing curriculum with high standards and relevance for all Utah children; and
4. Requiring effective assessment to inform high quality instruction and accountability.



**Message from
Dr. Larry Shumway
State Superintendent of Public Instruction
Utah State Office of Education**

Planning - Utah Consolidated Application

In order to fulfill these promises, Utah's schools must focus their energy and resources on the most critical efforts that address public education's core mission that help students be prepared for a bright and successful future.

The Utah Consolidated Application system encourages each LEA to prioritize specific goals based on the unique needs of the population it serves and to establish promising strategies that will help them achieve their goals.



**Message from
Dr. Larry Shumway
State Superintendent of Public Instruction
Utah State Office of Education**

Applying for Funds through the UCA

The application is a flexible, convenient program to help LEA's apply for, manage, and track both Federal and State funds. Some of the funds for which LEAs will be able to apply through the Utah Consolidated Application include:

- No Child Left Behind Act (NCLB) funds
- Individuals with Disabilities Education Act (IDEA),
- State K-3 Literacy, Extended-day Kindergarten, and Gifted & Talented grants



Message from
Dr. Larry Shumway
State Superintendent of Public Instruction
Utah State Office of Education

Overarching Goal

As the Utah State Office of Education has interacted with LEAs over the past few years, both the staff at USOE and the Utah State Board of Education have worked to simplify the number of applications and reports required from LEAs. The overarching goal in replacing the CUSAP system has been to achieve:

“One comprehensive system that LEAs use to submit plans and apply for funds.”



**Message from
Dr. Larry Shumway
State Superintendent of Public Instruction
Utah State Office of Education**

Commitment of the USOE to LEA assistance

The Utah State Office of Education is committed to providing the support you need to make this planning and application process both efficient and meaningful.

Please don't hesitate to contact our staff with any questions or concerns you may have regarding the new Utah Consolidated Application process.



**Message from
Dr. Larry Shumway
State Superintendent of Public Instruction
Utah State Office of Education**

Commitment of the USOE to students

The children of Utah are its greatest heritage. We must work together in ensuring that our children develop the academic, citizenship, and social skills they need to enjoy and protect the blessings of freedom.

The time we invest today with high-quality instruction for all students will prepare them to succeed in the competitive world they will face tomorrow.



Message from
Dr. Larry Shumway
State Superintendent of Public Instruction
Utah State Office of Education

In Conclusion

It is our hope that as LEAs consider the unique needs of the communities they serve, that we all may commit to specific goals that will focus our valuable resources on accomplishing the promises of public education. We will accomplish this by:

1. Ensuring literacy and numeracy for all Utah children;
2. Providing high quality instruction for all Utah children;
3. Establishing curriculum with high standards and relevance for all Utah children; and
4. Requiring effective assessment to inform high quality instruction and accountability.

Thank you.

New Utah Consolidated Application (UCA)

What is *UCA*?

- **The Utah Consolidated Application (*UCA*)** is a web-based tool designed to streamline your goal planning and align funding applications to those goals. It incorporates planning tools, funding applications, contact information, assurances, a document library, and an electronic communication system.
- **Planning Tool**
The planning section of the UCA assists local education agencies (LEAs) in aligning their needs assessment with specific goals, strategies and action steps.
- **Funding Applications**
The funding section of the UCA enables LEAs to align their financial resources with the identified goals, strategies and action steps and to apply for those funds in accordance with State and Federal Guidelines.

System Guidelines

Below is a list of the requirements to use *UCA*:

- Valid email address
- Mac or PC
- Active Internet connection
- Internet Explorer v.6.0 or above, or Firefox v.2.0 or above

The web-based system is accessible only when connected to the Internet. The data stored in the system is secure, however, sensitive and/or student identifying data should not be stored in the system.

System Notes

The system does not require available disk space, but it may be beneficial to have space on your computer for district document storage. Also, a document scanner would be helpful to make electronic versions of printed documents, but it is not required.

Please note that mail servers for school districts and state offices may have high security settings and the automatic notification messages from *UCA* could be blocked. If users at your district are not receiving *UCA* invitations and messages, USOE will work with your IT department to ensure that messages can be delivered.

Getting Started

This section will provide a brief overview of how to get an account on UCA and log on to the system.

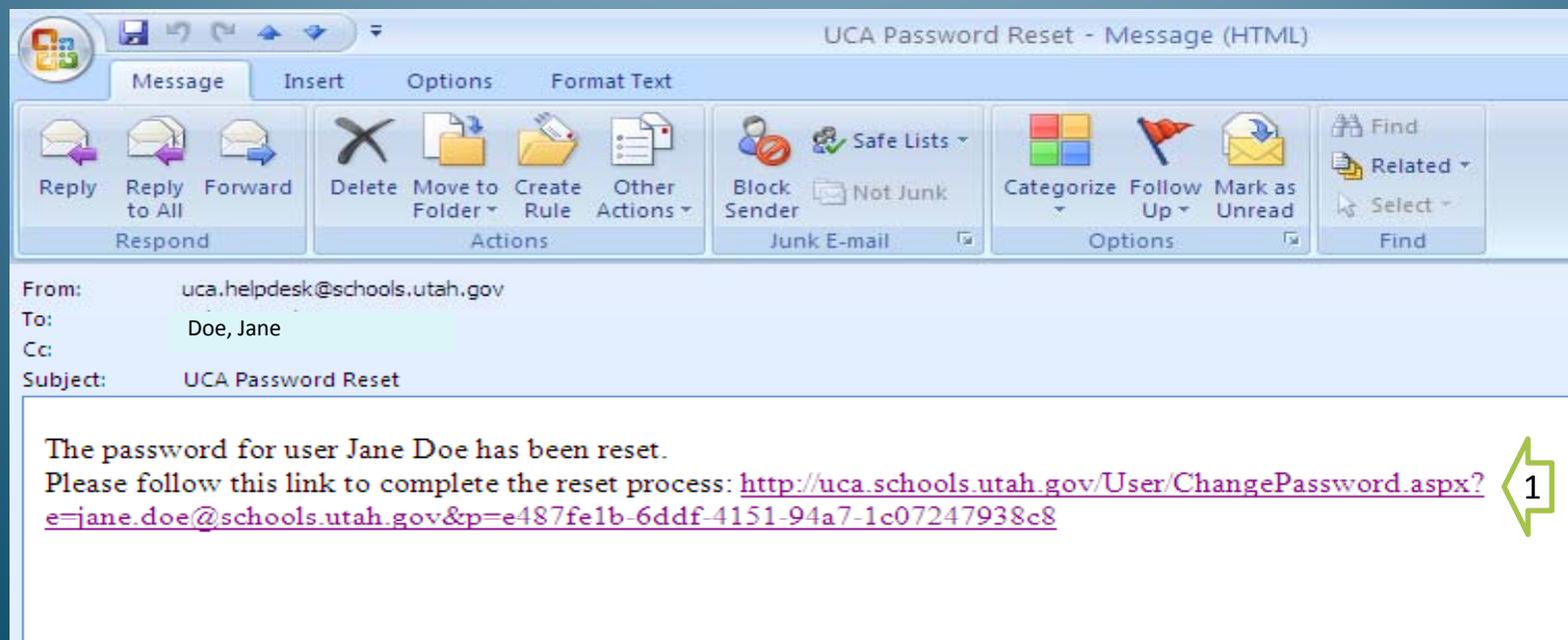
Authorized User Accounts

In order to input information into the UCA, you must have a valid email address. Your email address will serve as your User Name. Your district UCA Administrator will create a separate UCA user account for you.

Email Confirmation

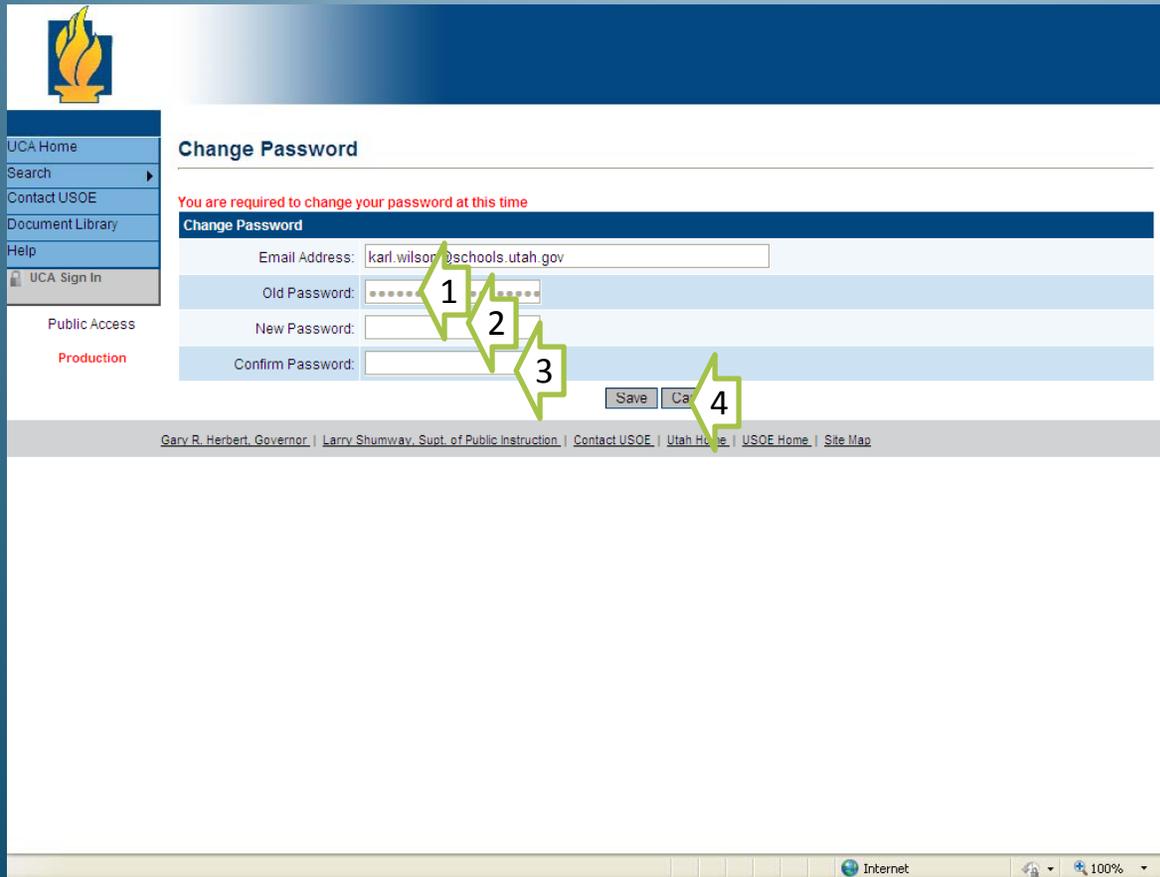
When an LEA creates a new authorized user, USOE will send, via email, a confirmation that a new user has been created. That email message will include a link to the Utah Consolidated Application in order to establish the user password.

Step 1: Select the UCA link to initiate the change password process.



Set Password

When you click on the link, you will enter the UCA Home Page. Here you set your password.



The screenshot shows the 'Change Password' page on the UCA Home Page. The page has a blue header with the Utah State Office of Education logo. A navigation menu on the left includes links for UCA Home, Search, Contact USOE, Document Library, Help, and UCA Sign In. The main content area is titled 'Change Password' and features a red warning message: 'You are required to change your password at this time'. Below this, there are four input fields: 'Email Address' (containing 'karl.wilson@schools.utah.gov'), 'Old Password' (masked with dots), 'New Password', and 'Confirm Password'. A 'Save' button is visible at the bottom right of the form. Four green callout boxes with numbers 1, 2, 3, and 4 point to the Old Password, New Password, Confirm Password, and Save buttons respectively. The footer contains links for Gary R. Herbert, Governor; Larry Shumway, Supt. of Public Instruction; Contact USOE; Utah Home; USOE Home; and Site Map. The browser's address bar shows 'Internet' and a 100% zoom level.

Step 1: On the Change Password page, Enter Old Password (same as Email Address)

Step 2: Set your new password
[Password must be at least 8 characters, contain 1 uppercase letter, 1 lowercase letter, and 1 number]

Step 3: Confirm new password

Step 4: Save

Log-on Options

Once you have established your password, you may continue to navigate within the UCA program. After you have logged off the system, there are several ways you can quickly log back into the system:

1. Anyone can view the Utah Consolidated Application system by logging on to the Utah State Office of Education Home Page; the program allows public access. Remember, however, that only authorized users are able to enter information, make revisions, and make submissions for approval. Once you log-on to the system, you will need to sign-in. The next slide will illustrate how this is done.
2. You may establish a link on your computer through the **Favorites** option on your own web browser. The Utah Consolidated Application URL is: <http://uca.schools.utah.gov>

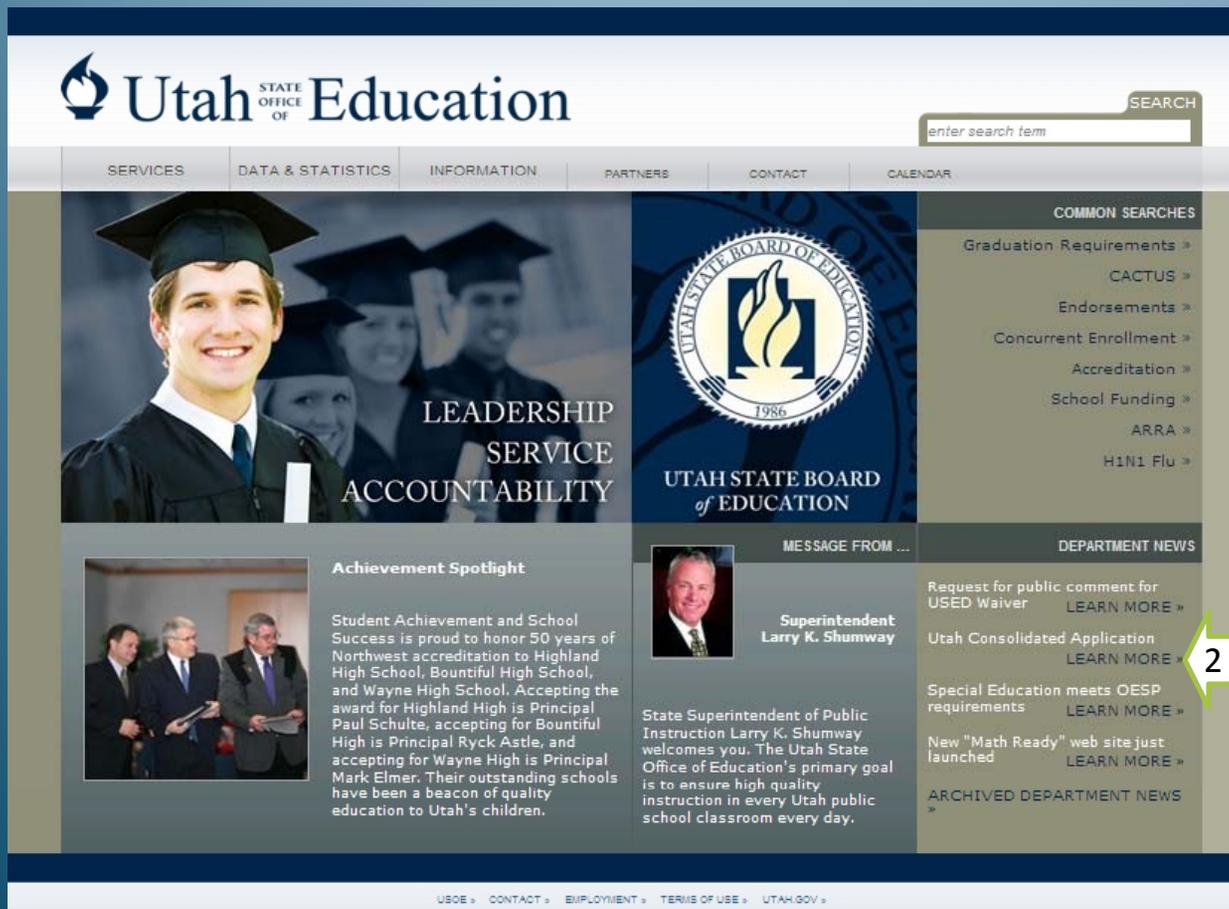
Logging on to UCA

Utah State Office of Education Home Web-page:

<http://www.schools.utah.gov/main/>

1

Step 1: Log on to the Utah State Office of Education Home Web-page



Utah STATE OFFICE of Education

SERVICES DATA & STATISTICS INFORMATION PARTNERS CONTACT CALENDAR

SEARCH
enter search term

LEADERSHIP SERVICE ACCOUNTABILITY

UTAH STATE BOARD of EDUCATION

COMMON SEARCHES

- Graduation Requirements »
- CACTUS »
- Endorsements »
- Concurrent Enrollment »
- Accreditation »
- School Funding »
- ARRA »
- H1N1 Flu »

ACHIEVEMENT SPOTLIGHT

Student Achievement and School Success is proud to honor 50 years of Northwest accreditation to Highland High School, Bountiful High School, and Wayne High School. Accepting the award for Highland High is Principal Paul Schulte, accepting for Bountiful High is Principal Ryck Astle, and accepting for Wayne High is Principal Mark Elmer. Their outstanding schools have been a beacon of quality education to Utah's children.

MESSAGE FROM ...

Superintendent Larry K. Shumway

State Superintendent of Public Instruction Larry K. Shumway welcomes you. The Utah State Office of Education's primary goal is to ensure high quality instruction in every Utah public school classroom every day.

DEPARTMENT NEWS

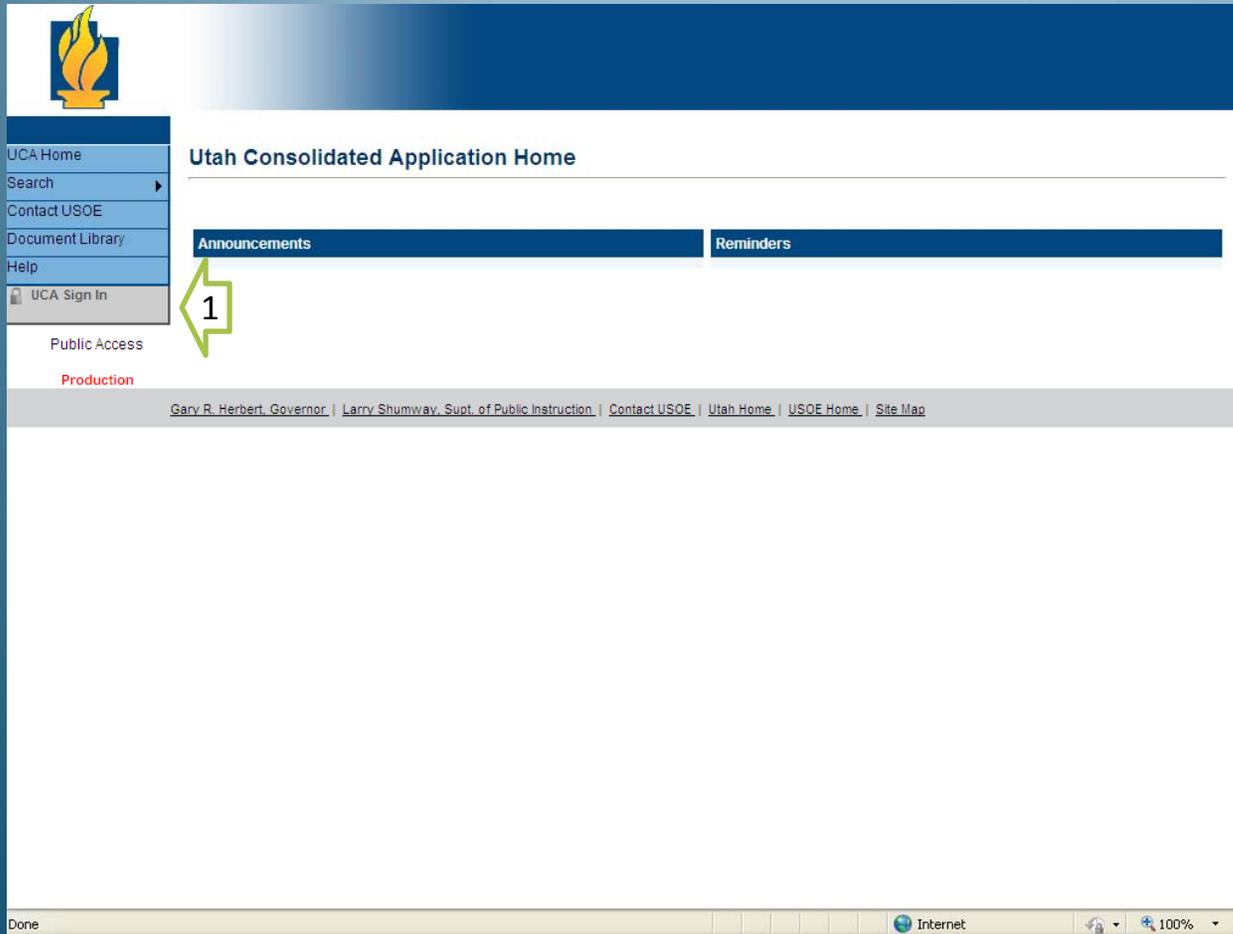
- Request for public comment for USED Waiver LEARN MORE »
- Utah Consolidated Application LEARN MORE »
- Special Education meets OESP requirements LEARN MORE »
- New "Math Ready" web site just launched LEARN MORE »
- ARCHIVED DEPARTMENT NEWS »

USOE » CONTACT » EMPLOYMENT » TERMS OF USE » UTAH.GOV »

2

Step 2: Under Department News section, select **LEARN MORE** under Utah Consolidated Application

Getting Started



UCA Home

Search

Contact USOE

Document Library

Help

UCA Sign In

Utah Consolidated Application Home

Announcements

Reminders

1

Public Access

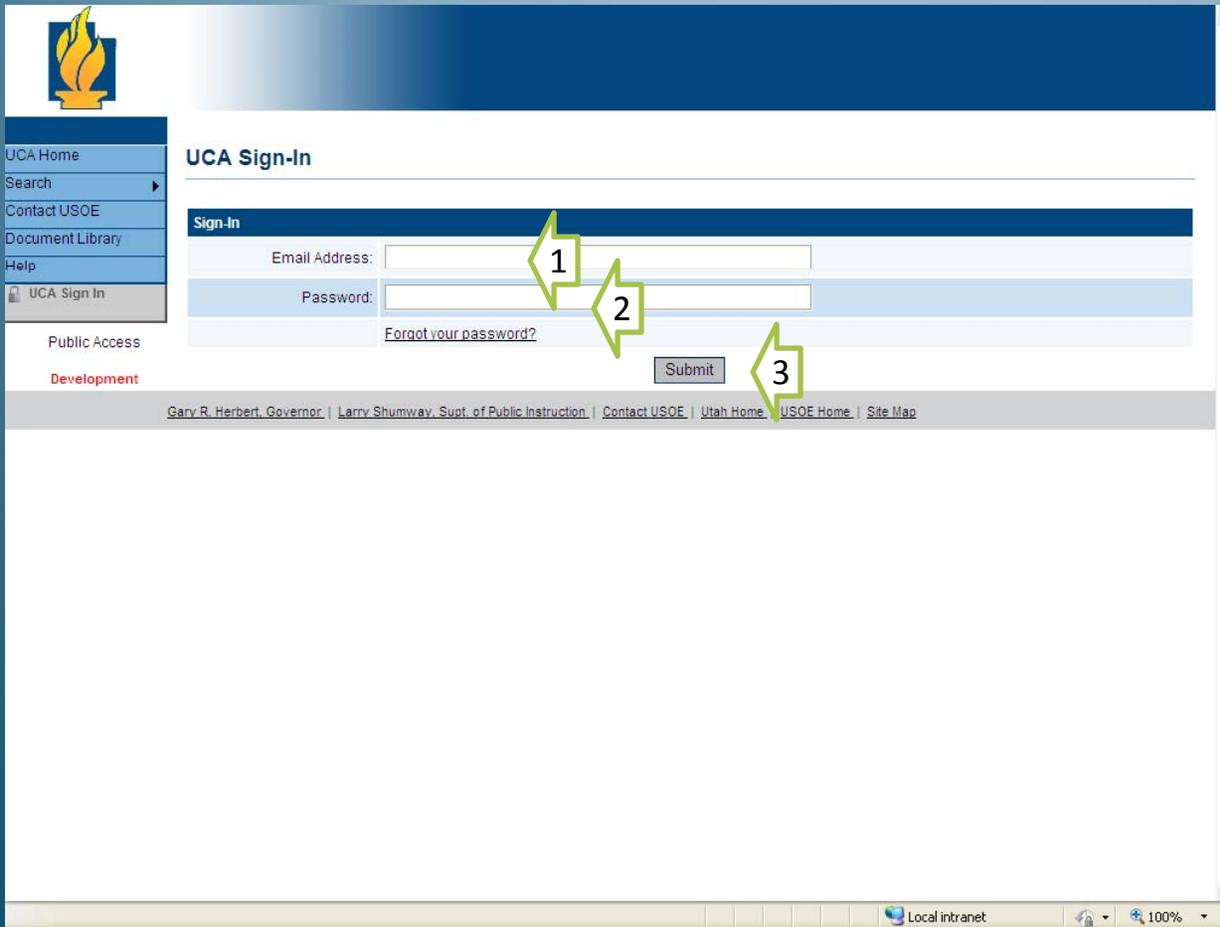
Production

[Gary R. Herbert, Governor](#) | [Larry Shumway, Supt. of Public Instruction](#) | [Contact USOE](#) | [Utah Home](#) | [USOE Home](#) | [Site Map](#)

Done Internet 100%

Step 1: On Utah Consolidated Application Home page, select **UCA Sign-in** button

UCA Sign-in



The screenshot shows the UCA Sign-In page. On the left is a navigation menu with items: UCA Home, Search, Contact USOE, Document Library, Help, UCA Sign In (highlighted), Public Access, and Development. The main content area is titled "UCA Sign-In" and contains a "Sign-In" form. The form has two input fields: "Email Address:" and "Password:". A "Forgot your password?" link is below the password field. A "Submit" button is at the bottom right of the form. Three green arrows with numbers 1, 2, and 3 point to the email address field, the password field, and the submit button, respectively. At the bottom of the page, there is a footer with links: Gary R. Herbert, Governor; Larry Shumway, Supt. of Public Instruction; Contact USOE; Utah Home; USOE Home; Site Map. The browser status bar at the bottom shows "Local intranet" and "100%" zoom.

Step 1: On UCA Sign-In page, enter Email Address

Step 2: Enter Password

Step 3: Submit

Setting Up Authorized Users

1. USOE will provide Statewide Announcements and Reminders on the UCA Home Page.
2. For Authorized Account Administrators ONLY, click on Administer to create users.



Utah Consolidated Application Home

DAVIS DISTRICT (07007) - Davis County

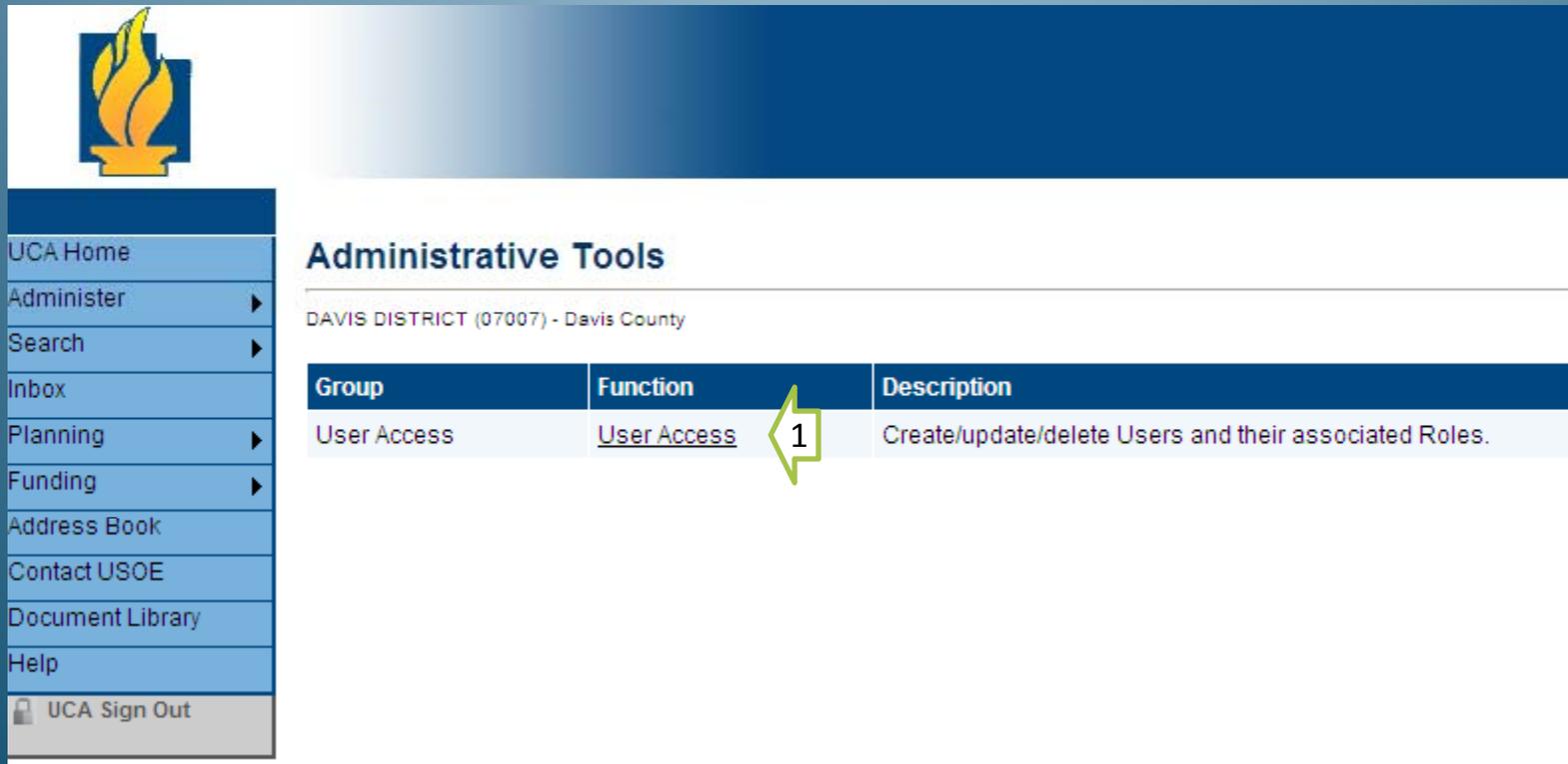
Associated Organizations

Inst Id	Organization Name
07007	DAVIS DISTRICT

Announcements Reminders

To Create Users

1. On the **Administrative Tools** page, select User Access.



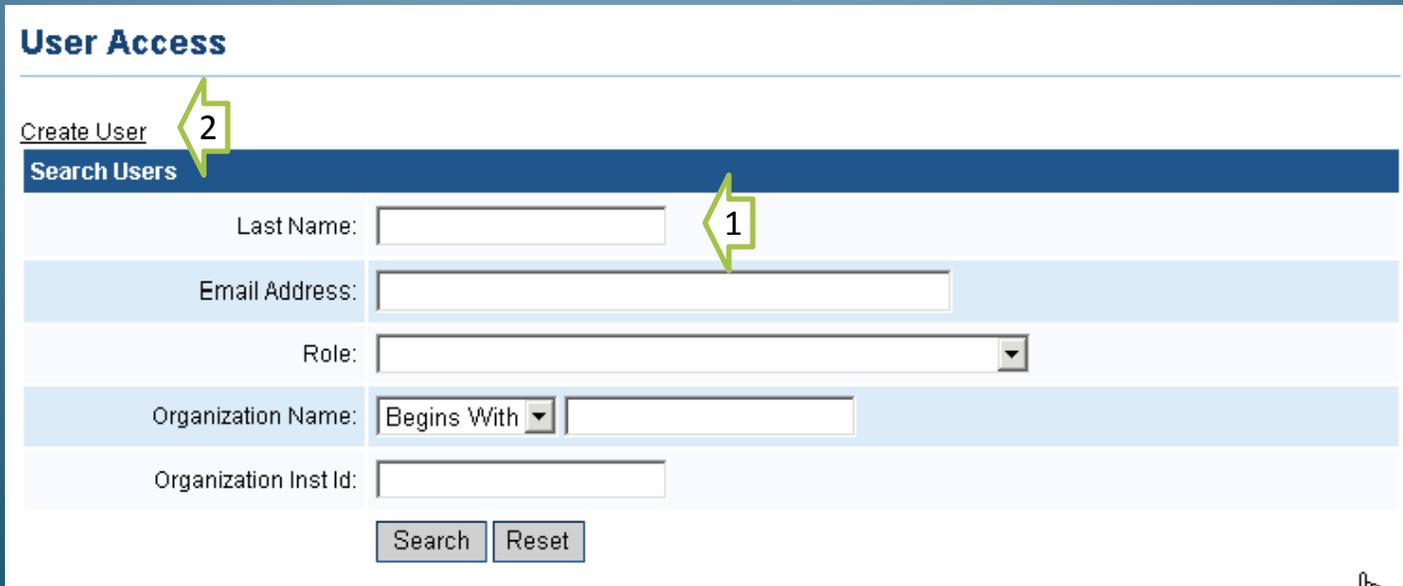
The screenshot shows the Utah State Office of Education administrative interface. On the left is a navigation menu with items like UCA Home, Administer, Search, Inbox, Planning, Funding, Address Book, Contact USOE, Document Library, Help, and UCA Sign Out. The main content area is titled "Administrative Tools" and shows "DAVIS DISTRICT (07007) - Davis County". Below this is a table with three columns: Group, Function, and Description. The "User Access" row is highlighted, and a green arrow with the number "1" points to the "User Access" link in the Function column.

Group	Function	Description
User Access	User Access	Create/update/delete Users and their associated Roles.

User Access

Creating User Accounts (Administrators Only)

1. If the LEA has already entered LEA staff in the **Address Book**, this page allows for a search option (by last name).
2. To create additional users, select Create User option.



The screenshot shows the 'User Access' form. At the top left, there is a link for 'Create User' with a green arrow and the number '2' pointing to it. Below this is a dark blue bar labeled 'Search Users'. Underneath, there are several input fields: 'Last Name' with a green arrow and the number '1' pointing to it, 'Email Address', 'Role' (a dropdown menu), 'Organization Name' (with a 'Begins With' dropdown and a text input), and 'Organization Inst Id'. At the bottom of the form are 'Search' and 'Reset' buttons.

Creating Users

Creating User Accounts (Administrators Only)

Create User

Create User

Email Address:	<input type="text"/>
First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Phone Number:	<input type="text"/>
Phone Extension:	<input type="text"/>
Fax Number:	<input type="text"/>

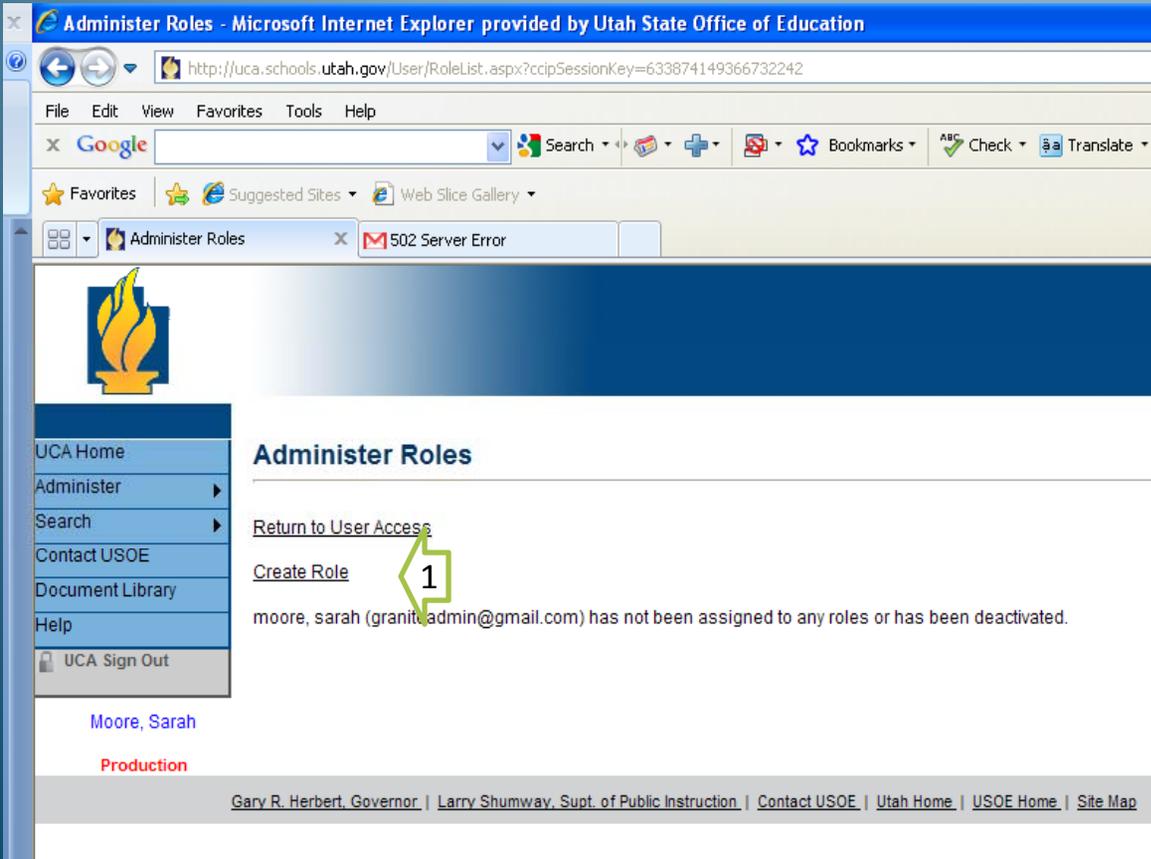
Step 1: To create a new user, complete the designated fields

Step 2: Select **Create** when finished.

Step 3: The new user will be emailed a link that will require them to create their own password.

Creating User Roles

Assign the new user a Role (Administrators Only)



UCA Home
Administer
Search
Contact USOE
Document Library
Help
UCA Sign Out

Administer Roles

[Return to User Access](#)

[Create Role](#) 1

moore, sarah (granite.admin@gmail.com) has not been assigned to any roles or has been deactivated.

Moore, Sarah
Production

Gary R. Herbert, Governor | Larry Shumway, Supt. of Public Instruction | [Contact USOE](#) | [Utah Home](#) | [USOE Home](#) | [Site Map](#)

After creating a new user, a role needs to be defined for them in the system. This role has specific duties.

Step 1: To create user roles, select Create Role

Assigning User Roles

(Administrators Only)

Step 1: From the Role pull-down menu, select for each user, authorized role(s).

The next slide provides more information about each of the defined roles.

Step 2: Select **Create**

Create Role - Microsoft Internet Explorer provided by Utah State Office of Education

http://uca.schools.utah.gov/User/RoleAction.aspx?ccipSessionKey=633874130799263102

File Edit View Favorites Tools Help

Google Search

Favorites Suggested Sites Web Slice Gallery

Create Role

JCA Home
administer
Search
Contact USOE
Document Library
Help
UCA Sign Out

Moore, Sarah
Production

Create Role

Create Role

User's Name: Moore, Sarah

Organization: ALPINE DISTRICT (01001)

Role: User Access Administrator

User Access Administrator
Business Administrator
Data Entry
Data View
District Superintendent or Charter School Leader
User Access Administrator

Create

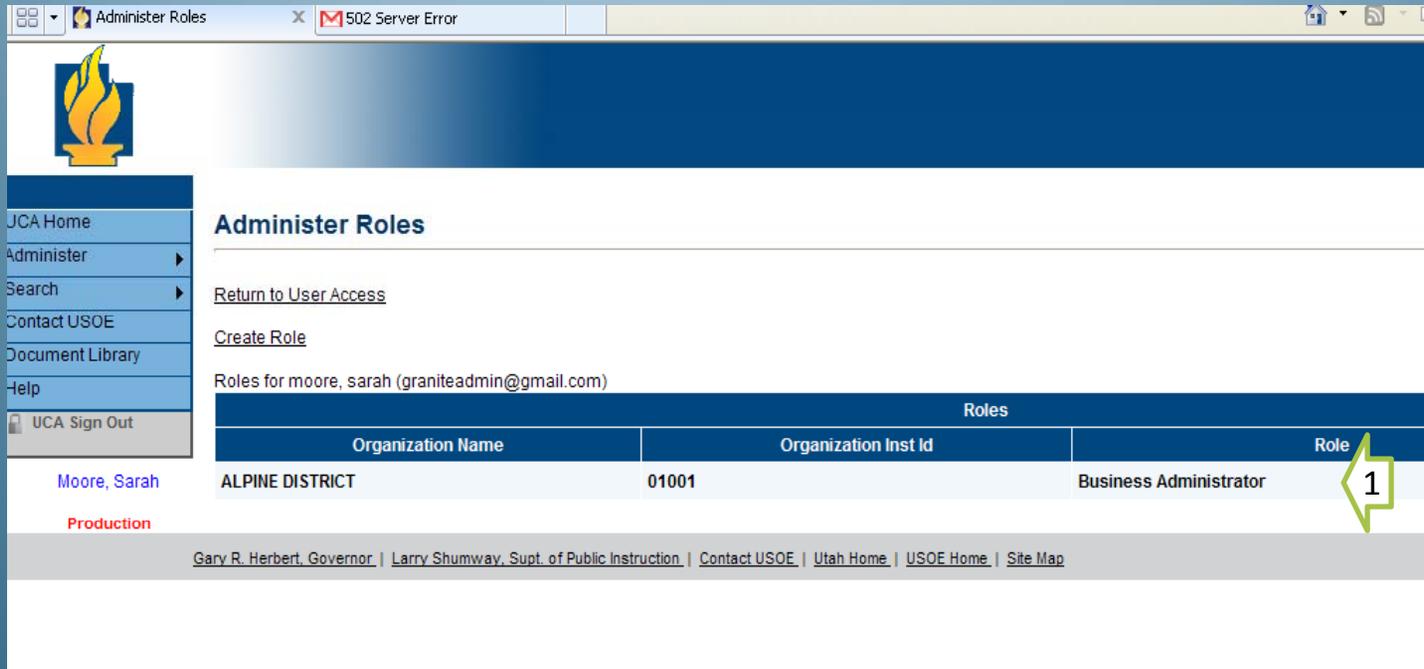
1 2

Gary R. Herbert, Governor | Larry Shumway, Supt. of Public Instruction | Contact USOE | Utah Home | USOE Home | Site Map

Specific LEA User Roles

<p>User Access Administrator</p>	<p>Allows the user to create, update, and delete users/roles for an organization. This role does NOT give the user any access to view or edit the Funding Application or Planning Tool.</p>
<p>Data View</p>	<p>Allows the user to view unapproved Funding Applications and the Active Plan.</p>
<p>Data Entry</p>	<p>Allows the user to edit any Funding Application and the Active Plan.</p>
<p>Business Administrator</p>	<p>Allows the user to give the first approval for a Funding Application and the final approval for Reimbursement Requests. Includes the roles Data View and Data Entry.</p>
<p>District Superintendent or Charter School Leader</p>	<p>Allows the user to give the final approval to the Funding Application. Includes the roles Data View and Data Entry.</p>

User Role Confirmation



Administer Roles

[Return to User Access](#)

[Create Role](#)

Roles for moore, sarah (graniteadmin@gmail.com)

Roles		
Organization Name	Organization Inst Id	Role
ALPINE DISTRICT	01001	Business Administrator

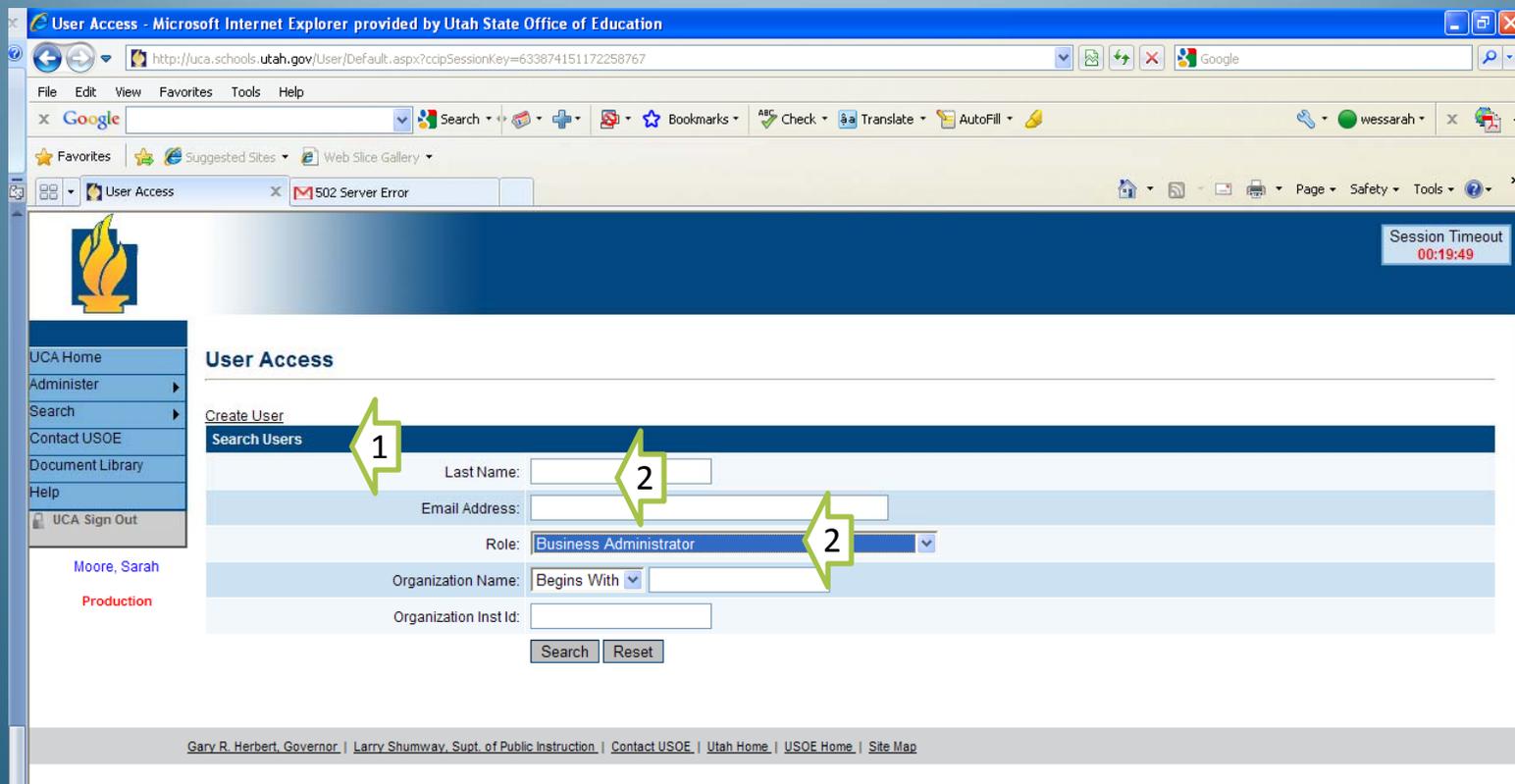
Moore, Sarah

Production

[Gary R. Herbert, Governor](#) | [Larry Shumway, Supt. of Public Instruction](#) | [Contact USOE](#) | [Utah Home](#) | [USOE Home](#) | [Site Map](#)

Step 1: After assignment of user roles, you will see a screen that will list all roles assigned to that user. Verify for accuracy.

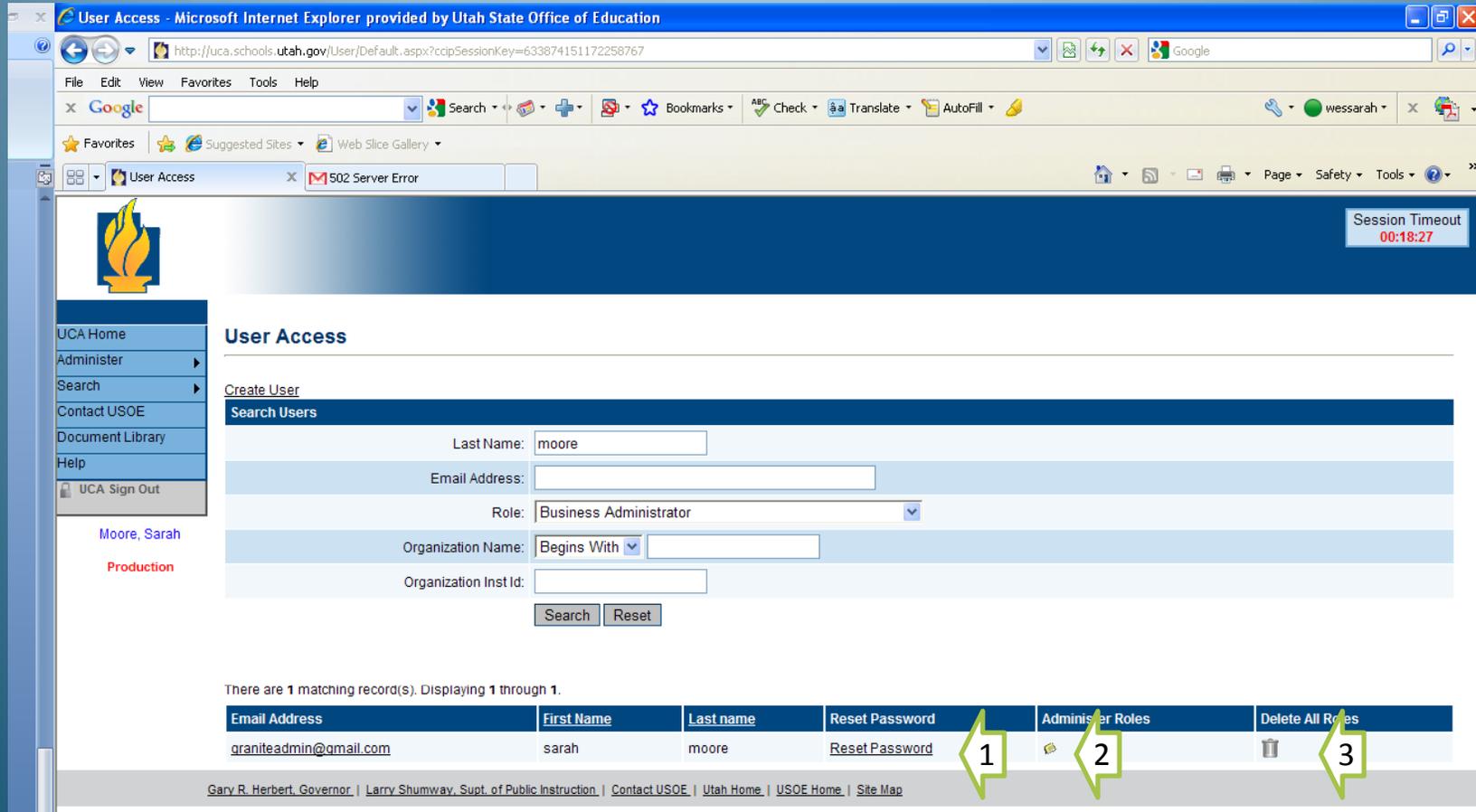
Searching for Users



Step 1: Under **User Access**, an LEA may use the **Search Users** option to find users already entered in the system.

Step 2: For example, an LEA may search by **Last Name** or **Role** (such as **Business Administrator**).

User Editing



The screenshot shows a web browser window with the URL `http://uca.schools.utah.gov/User/Default.aspx?ccipSessionKey=633874151172258767`. The page title is "User Access". On the left is a navigation menu with items like "UCA Home", "Administer", "Search", "Contact USOE", "Document Library", "Help", and "UCA Sign Out". The main content area has a "Session Timeout 00:18:27" indicator in the top right. Below the navigation menu, there are sections for "Create User" and "Search Users". The "Search Users" section contains search criteria: Last Name: moore, Email Address: (empty), Role: Business Administrator, Organization Name: Begins With (dropdown), and Organization Inst Id: (empty). There are "Search" and "Reset" buttons. Below the search criteria, it says "There are 1 matching record(s). Displaying 1 through 1." A table shows the search results:

Email Address	First Name	Last name	Reset Password	Administer Roles	Delete All Roles
graniteadmin@gmail.com	sarah	moore	Reset Password		

Three green callout boxes with numbers 1, 2, and 3 point to the "Reset Password", "Administer Roles" (pencil icon), and "Delete All Roles" (trash icon) columns respectively.

Under the **Search Users** option, User Administrators will have the ability to :

1. Reset passwords;
2. Update user information such as role(s); and
3. Delete users.

End of
Utah Consolidated Application Training
Module 1 – UCA Overview

This training document continues with
Utah Consolidated Application Training
Module 2 – Planning Tool