

MANAGE YOUR GOAL BANK WITH CATEGORIES

TO CREATE YOUR GOAL BANK WITH CATEGORIES:

Go to a student's record

Click on Annual Goals

Click on Add Annual Goal from Bank

Click on Manage Your Bank of Goals

Scroll down to bottom of page

Click on Create Categories for my Goal Bank (will say EDIT Categories after you create a category)

Type in your categories (e.g., Reading, Behavior, etc.). You can put type in 8 categories at a time. If you have more than 8 categories you will need to repeat the above steps in order to add them.

Click on Update the Database

This brings you back to Manage Annual Goal Bank page

Look at the top of the screen – it says “Categories – none”

Click on the down arrow and choose a category (e.g., Reading, Behavior, etc.)

This will bring you to a screen where you will type your goals for this category. You can type 4 goals at a time. If you have more than 4 goals for this category, you will need to repeat the steps above to add additional goals for this category.

Click on Update the Database

IMPORTANT NOTE: When you add Goals to your categories, pay attention that you choose the correct category to add your goals to. If you type them in the wrong category, you can move them by using the copy/paste method. First copy the goal (right click, copy); then you will need to DELETE the goal from the incorrect category and add the goal to the correct category (right click, paste).

TO USE YOUR GOAL BANK WITH CATEGORIES:

Go to the student's record

Click on Annual Goals

Click on Add Annual Goals from Bank

YIKES! It's empty !!! (or the goal you are looking for is not there)

Look at the top of the screen – it says “Categories – none”

Click on the down arrow and choose the appropriate category

There are your goals for that category

Put a checkmark in the ADD column in front of the goal(s) you want to add

Click on Update the Database

NOTE: If you have goals that you did not assign a category, they will appear in the list when you click on Add Annual Goals from Bank.