



Choices360 Release Notes

December 2018

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RELEASE NOTES SUMMARY

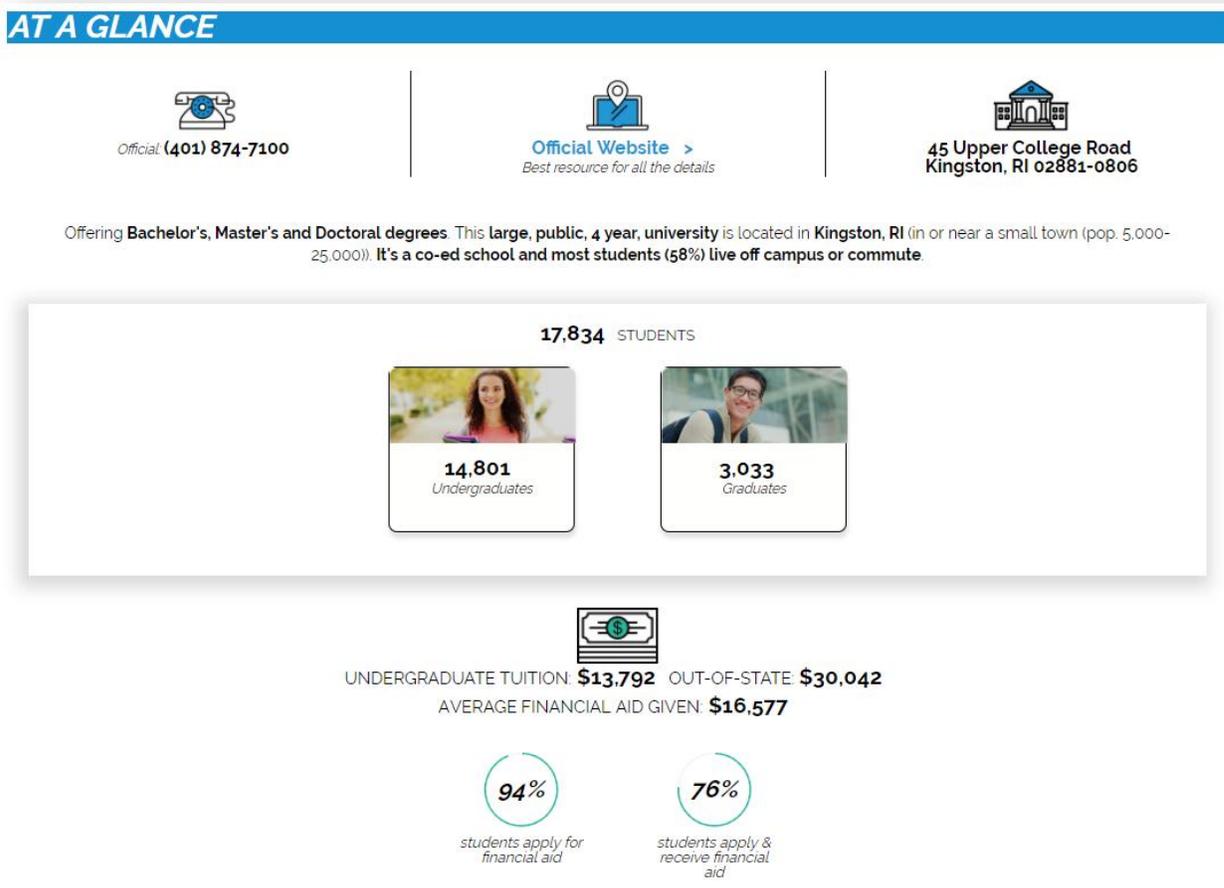
These release notes detail the product improvements and new features included in the December 13th release. Some images may differ from the final product.

- **Two- and Four-year College Data Update** - The profile information used by students to explore colleges has been updated for more than 4,000 undergraduate schools with the latest information from Wintergreen Orchard House.
- **Professional Center Redesign** -The Professional Center has been updated with a sleeker, more modern look.
- **New Communication Log** - XAP has added a new Communication Log feature to the Professional Center to make it easier for counselors and educators to track communications with their students.
- **Parent Account Enhancements** - The optional parent information fields found in each student's portfolio (Your Profile → The Basics) have been updated.
- **Trackable Activities Improvements** - To improve reporting and tracking functionality, previously non-trackable activities have been updated to be trackable, and some activities can now be tracked year over year (annual tracking).
- **New Professional Center Account Type and Enhanced Group Functionality** – A new professional center account type has been added and groups can now be assigned to professionals.
- **ILP Guidance Text Enhancements** - XAP has enhanced the presentation options for guidance text on pages and within sections within the Individual Learning Plan tool (also known as ICAP, ISP or PGP).
- **Phase 1 of the New Surveys Tool** – School educators can now create custom surveys to assign to students to complete.
- **Updated My Saved Colleges** - The portfolio activity, Saved Colleges and Postsecondary Schools, has been updated with a fresh look and new functionality.
- **New Email Domain Check** – A new validation check on email address domains has been added.

1. TWO- AND FOUR-COLLEGE DATA REFRESHED

The profile information used by students to explore colleges has been updated for more than 4,000 undergraduate schools with the latest information from Wintergreen Orchard House. The update includes:

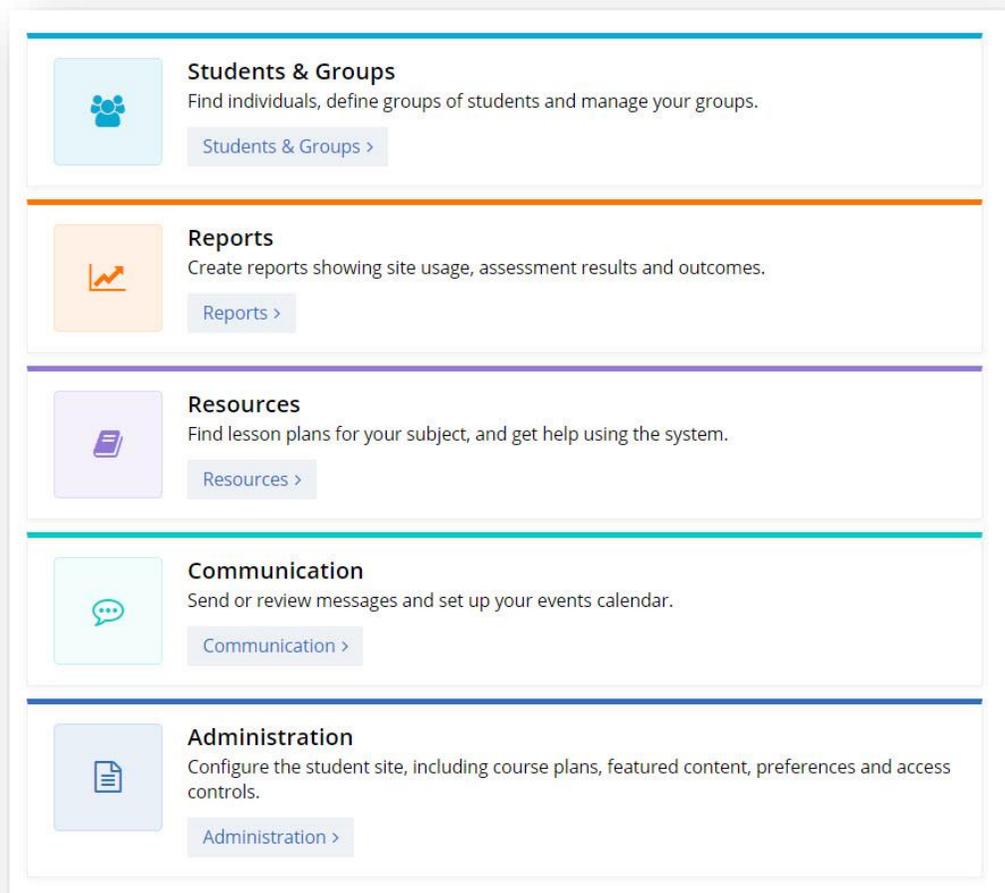
- Revised list of programs for each school (mapped to the 2010 Classification of Instructional Programs)
- Refreshed tuition and admissions information, basic school data such as links to a school's website, contact information, enrollment figures, and more.



A sample of the data that was refreshed

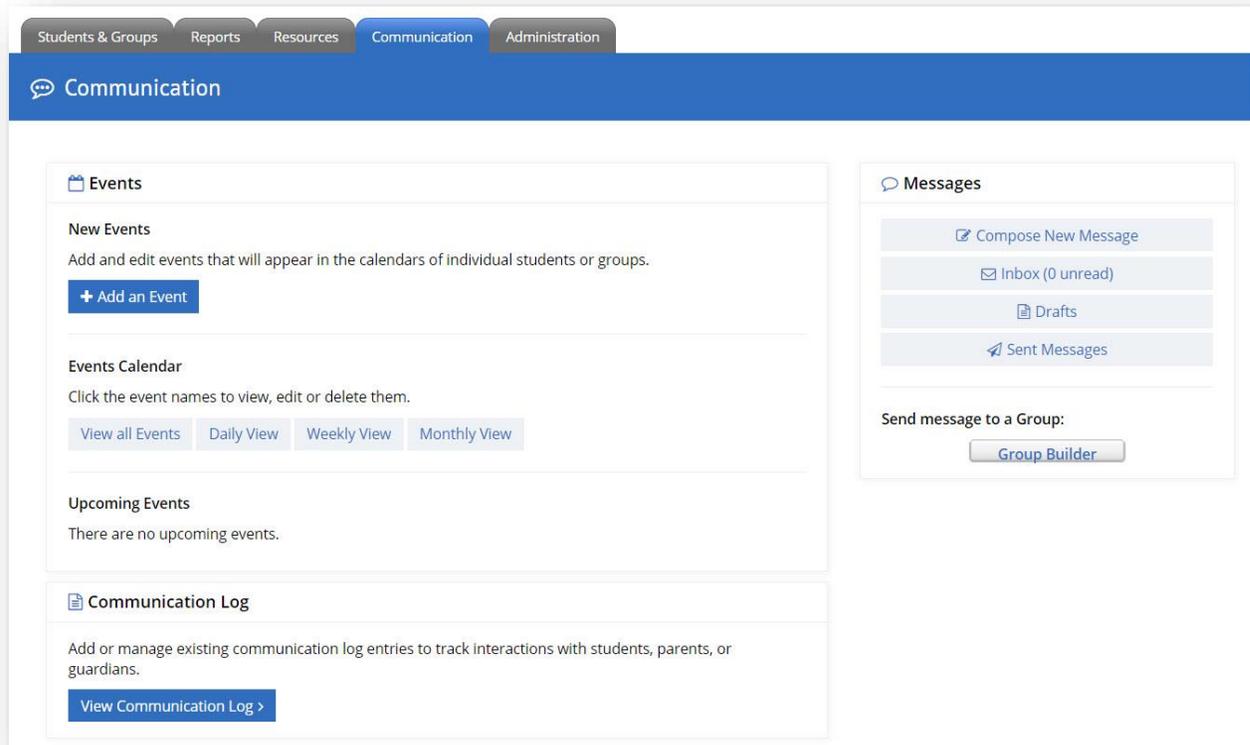
2. PROFESSIONAL CENTER REDESIGN

The Professional Center has been updated with a sleeker, more modern look. Every page, from the home page to each section page, has been enhanced to be easier to scan and read, and to provide a better presentation of the tools within it. The width of the page will now automatically adjust to the width of the screen.



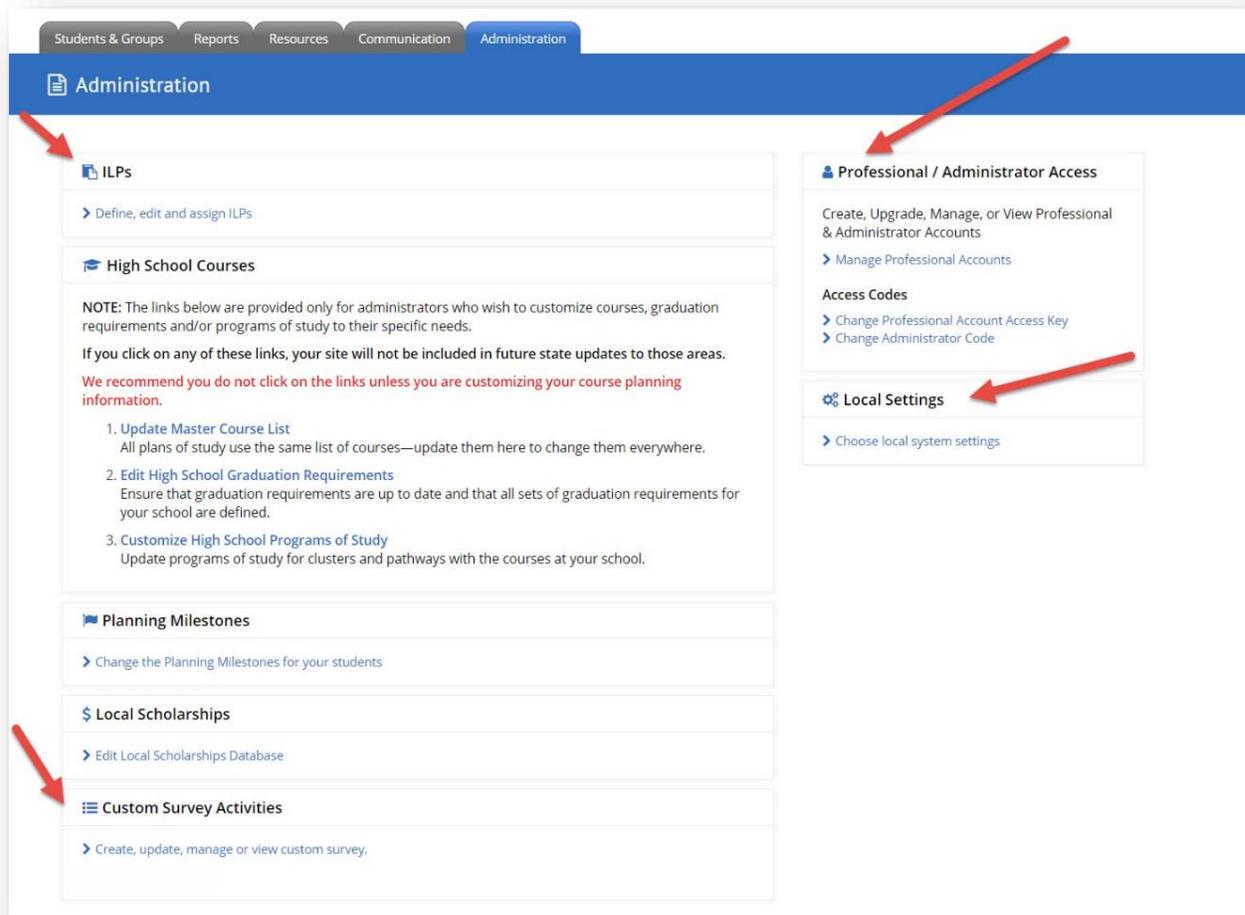
New layout of the Professional Center landing page

The Communication section has been restructured so that the Events and Messages tools are clearer and easier to use.



*Revised Communication section page
(also showing the new Communication Log feature)*

Professional center account holders with administrative privileges will see a redesigned Administration section. Tools for managing accounts and local settings have been moved to the right sidebar while the Individual Learning Plan (ILP) tool (also known as ICAP, ISP or PGP) is now at the top left. The new survey tool (phase 1 of which is in this release) is available at the bottom of the page.



Updated Administration section

And the professional's view of a student portfolio has been updated. Each section of the student's portfolio is now an icon – including an icon for an ILP (also known as an ICAP, PSP or ISP). Also included on this page is the communication log where professionals can add details of communications with the student and their parents or guardians.

View Student Portfolio

Portfolio For - Marsh, Gwen Index Career Planning High School Planning College Planning Financial Aid Planning Profile Journal

 Career Planning	 High School Planning	 College Planning	 Financial Aid Planning
 Career and College R...	 Your Profile	 Your Journal	 Planning Milestones
 All Saved Documents			

Username and Password

Be certain to notify the student when you reset their password. The action will also be recorded by the operator of the site.

[View username or reset password](#)

Advisor's Comments

Advisor's Review

Has this portfolio been reviewed by an advisor?

Yes
 No

[Save setting](#)

Communication Log



No Log Entries

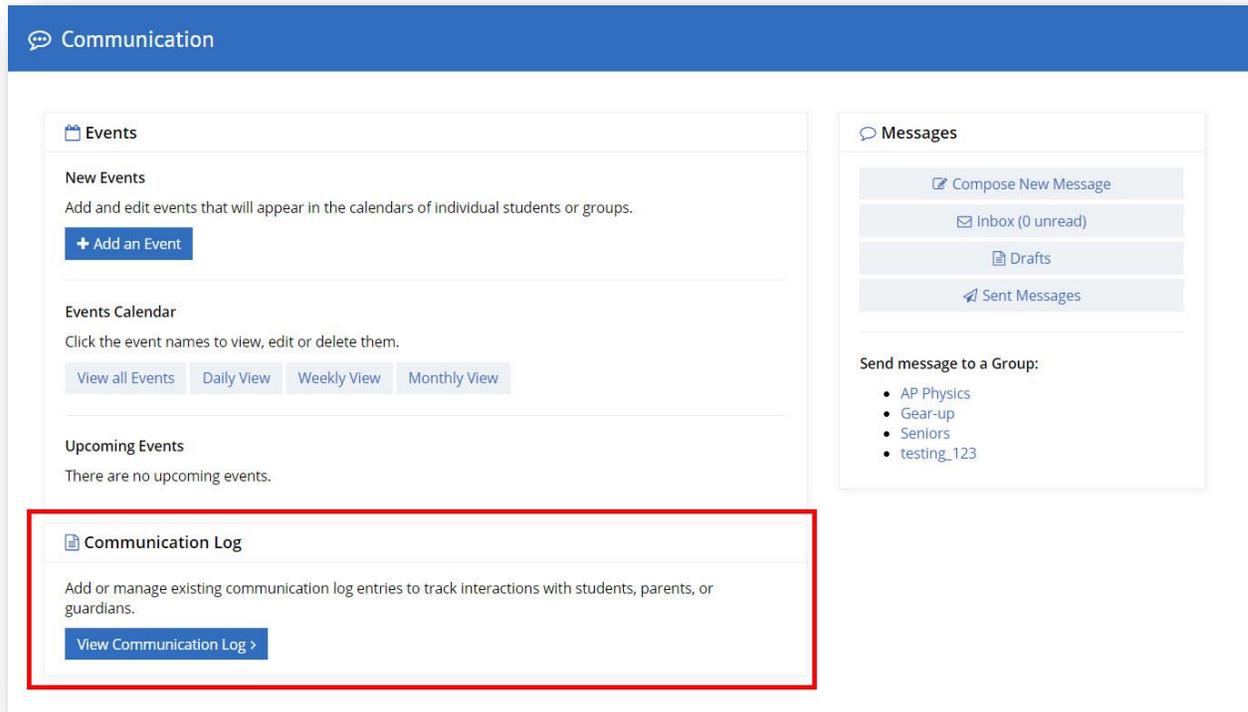
There are no communication log entries for this student. Click [Add New Entry](#) to create a new entry for this student.

[+ Add New Entry](#)

New professional view of a student's portfolio and communication log

3. NEW COMMUNICATION LOG

XAP has added a new Communication Log feature to the Professional Center to make it easier for counselors and educators to track communications with their students. Professionals can now use the Communication Log to create and maintain a chronological journal of interactions and communications with students, parents, and guardians.



Communication Log accessible via the Communication tab

Educators can access the communication log either directly via the Communication tab or by searching for a student or group of students through the Students and Groups tab. From the resulting list, counselors can add, review, delete, or edit a communication log entry. Educators can view all communication log entries they have created themselves and all entries that have been created and flagged as viewable to other professionals.

< Communication Log - Chester Alan Arthur

+ New Entry Print Search...

Date / Time	Communication Type	Contacted	Contacted By	Time Spent	Details	Actions
Oct 24, 2018 - 1:30 PM	Voice message	Chester Alan Arthur	Gwen marsh	5m	Called re: SAT results	Edit Remove

Details
Called re: SAT results

Communication log entry

Professionals can add a new entry to describe the date and time of the communication, the type of communication, the length of the communication, the communication details and who can view the communication entry.

New Entry

Log entries for:
Chester Alan Arthur

Contact date: Oct 24, 2018 Contact time: 2 : 00 PM

Contact type: In-person conversation Contacted by: Gwen marsh

Time spent: Hour Min

Details:

Who else can see this entry? Check all that apply:
 All Professionals Parent(s) Student

[Save](#) [Cancel](#)

New communication log entry form

In addition, comments an educator has added to a student’s portfolio are also listed in the communication log.

Communication Log - Chester Alan Arthur

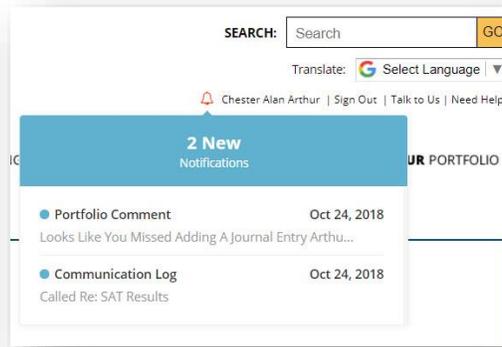
[+ New Entry](#) [Print](#) Search...

Date / Time	Communication Type	Contacted	Contacted By	Time Spent	Details	Actions
Oct 24, 2018 - 2:35 PM	Portfolio Comment	Chester Alan Arthur	Gwen marsh		Your Journal: Looks like you missed adding a journ...	
Oct 24, 2018 - 1:30 PM	Voice message	Chester Alan Arthur	Gwen marsh	5m	Called re: SAT results	Edit Remove

View 10 records | Found 2 matching records Page 1 of 1

A professional's view of the communication log showing the type of communication

Students are alerted to communication entries that have been logged and shared with the student and portfolio comments created by the counselor at the top of the page when they sign in.



Students are notified when they sign in and can click to see the communication log entries

In the student's view of their portfolio, a list of the professional's comments and shared logged communications are shown.

 **Communication Log**

If your teacher or counselor has logged their communications with you, you can view their records below.

 **Oct 24, 2018 - 2:35 PM** [View](#)

Looks like you missed adding a journal entry Arthur.

Communication type: Portfolio Comment | Contacted: Chester Alan Arthur | Contacted by: Gwen marsh

 **Oct 24, 2018 - 1:30 PM** [View](#)

Called re: SAT results

Communication type: Voice message | Contacted: Chester Alan Arthur | Contacted by: Gwen marsh

Page < 1 > of 1

Student view of their communication log

In the parent's view of their student's portfolio, a list of the of shared logged communications is shown.

The communication log makes it easier for professionals to track and record their interactions with students, parents, and guardians – saving counselors time for working directly with students.

4. PARENT INFORMATION CHANGES

The optional parent information fields found in each student's portfolio (Your Profile → The Basics) have been updated. Data fields such as "Father living?" or "Did your parents graduate from college?" have been removed. Two new fields have been added, daytime phone number and cell phone, as well as the question "Should your parent receive communications?".

In addition, a parent's first name, last name and email address will be automatically added to a student's portfolio when the student invites their parent(s) to create an account and connect to their portfolio. Upon signing into their accounts, parents will immediately see a connection to their student's portfolio.

NOTE: Students in districts and schools using XAP's Student Information System data integration and who have included parent demographics in their data transfer will be able to view the parent/guardian data fields but not edit them.

The screenshot shows a form titled "PARENTS/GUARDIANS" with the following fields and options:

- First name: [Text input]
- Middle name: [Text input]
- Last name: [Text input]
- Relationship: Parent Guardian
- Street address: [Text input]
- City: [Text input]
- U.S. state/territory: [Dropdown menu: Select your state]
- Country: [Dropdown menu: Select your country]
- Zip code: [Text input: #####]
- International Postal Code: [Text input]
- Email address: [Text input: @]
- Home phone: [Text input: (###) ###-####]
- Daytime phone number: [Text input: (###) ###-####]
- Cell phone: [Text input: (###) ###-####]
- Should the parent receive communications?

At the bottom of the form are two buttons: "Save" (with a checkmark icon) and "Cancel" (with an X icon).

Student view of parent/guardian information

5. TRACKABLE ACTIVITIES ENHANCEMENTS

To improve reporting and tracking functionality, previously non-trackable activities have been updated to be trackable, and some activities can now be tracked year over year (annual tracking).

New Trackable Activities

The following activities available within the Individual Learning Plan tool (also known as ICAP, PSP and ISP) are now trackable activities. This means educators and administrators can track (using the ILP tracking report) whether a student who has been assigned the activity has completed the activity.

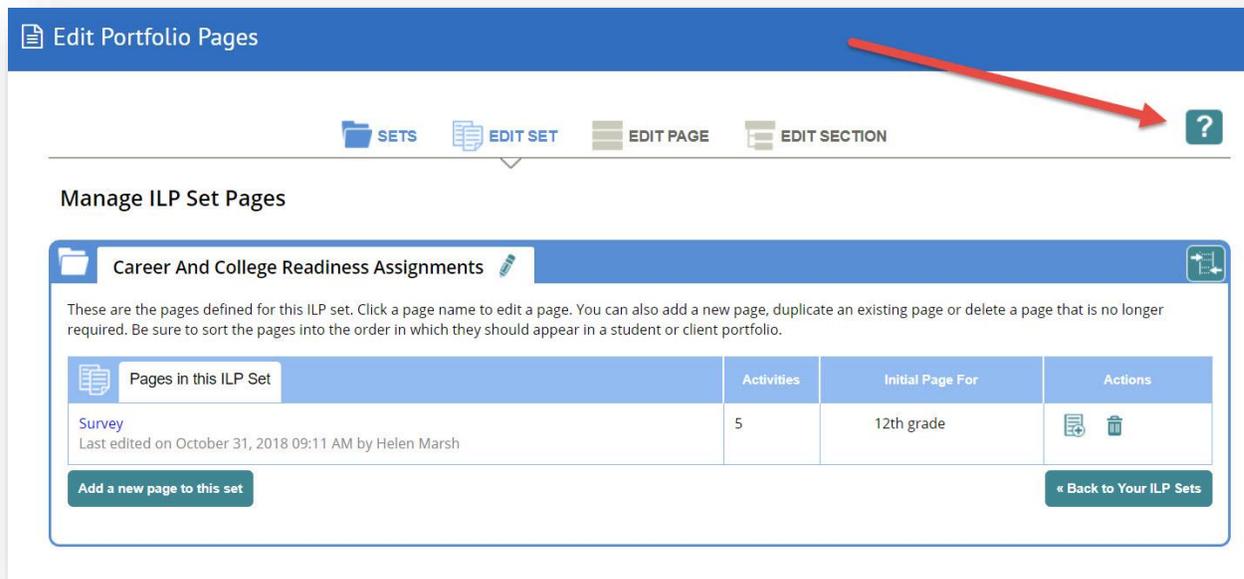
Activity Name	Completion Criteria
Community Service and Service Learning	At least one experience saved in the Community Service and Service Learning portfolio activity
Extracurricular Activities	At least one activity saved in their Extracurricular Activities portfolio activity.
Enrichment Courses and Workshops	At least one course or workshop saved in their Enrichment Courses and Workshops portfolio activity.
After High School Transition Plan	At least one plan saved in the After High School Transitions Plan portfolio activity.
My Reviews and Comments	At least one comment is saved in the My Reviews and Comments portfolio activity.
Early College Access Programs	At least one program is saved in the Early College Access Programs portfolio activity.

NOTE: Within current ILPs, ICAPs and PSPs, the activities listed above have been updated so that they're set to be trackable with completion occurring at any time. See below for details on switching to annual tracking.

The completion criteria for the activity, Plan of Study, has been updated to be considered complete when at least one course has been added to a student's course plan. Previously, the activity was considered complete when a student selected "Create a new plan". Students who have completed the Plan of Study prior to this change will still be considered to have completed the Plan of Study activity.

Activity Name	Completion Criteria
Plan of Study	At least one course was saved in a Plan of Study

For a detailed list of the available activities within the ILP tool as well as their completion criteria, select the help indicator:  on the Edit Portfolio pages and Edit Portfolio Set pages.



Help document listing activities available in the ILP and their completion criteria

Annual Tracking

XAP has introduced new annual tracking options in the ILP tool in the Professional Center to help counselors and administrators track activities that may be required to be completed in multiple years (for example, adding saved careers in grades 9, 10 and 11).

Educators creating or updating an ILP can choose to track completion of any of the following activities annually, once, or never.

- Your Plan of Study
- My Goals and Action Plans
- My Reviews and Comments
- Early College Access Programs
- Extracurricular Activities
- After High School Transition Plan
- Awards, Distinctions, Honors
- Community Service and Service Learning
- Work Experience
- Job Shadowing Experiences
- Saved Careers
- Saved Colleges and Postsecondary Schools
- Saved Programs and Majors
- Leadership Experiences
- Enrichment Courses and Workshops
- Focus Career Cluster
- Resumes
- Experiences
- Networking

The activities listed above are set to track completion at any time (as they were prior to this release). To change the activity to track annually, to the Professional Center → Administration → Edit ILP and make the change to the individual activities.

Section 1

To find the activities you want to add to this section, select a portfolio section or search by keyword. Select and add the activities you want, then add guidance text between them.

Selected Activities

[Enter optional guidance text.](#)

Saved Careers ✕

- Not Tracked
- Tracked (completed anytime)
- Tracked (completed during specific grade)

Select Grade

Find Activities By...

Portfolio Section: **OR** Search:

[« Return to editing page](#)

Activity tracking options

6. NEW PROFESSIONAL CENTER ACCOUNT TYPE AND ENHANCED GROUP FUNCTIONALITY

There is a new type of professional center account – a **limited professional** account. Educators with a limited professional account can only see, review, comment and report on the student portfolios assigned to them. In addition, a limited professional can only communicate with their assigned students. Administrators can create a limited professional account using the tools in the Administration tab. All professional center accounts except limited professional accounts can assign students to another professional account.

Manage Professional Accounts

Manage Professional & Administrator Accounts

Here you can create new Professional or Administrator Accounts, view all Professional & Administrator accounts associated with this site, and change their account types. A professional user with a limited account will only see and access the students in the group assigned to them by a Professional Advisor or Professional Administrator.

Click an account name to view its portfolio.

Account Creation

Create a new:

Account Owner & Account Name	Account Type	Actions
23Test, Ricardo (ricest23)	Professional Administrator	<input type="radio"/> Limited Professional <input type="radio"/> Professional Advisor <input checked="" type="radio"/> Professional Administrator <input type="radio"/> Remove Professional Center Privileges Update Account
Castin, Ellen (Ellen_test_360)	Professional Advisor	<input type="radio"/> Limited Professional <input checked="" type="radio"/> Professional Advisor <input type="radio"/> Professional Administrator <input type="radio"/> Remove Professional Center Privileges Update Account

New limited professional account options in the Manage Professional Account functionality

When a limited professional runs a report, they will automatically be limited to reporting upon their assigned students.

Filter by Group?

NO YES

Select the group you want included:

Your Groups ▾ AP Physics ▾

Selection of group in report filters

New Group Feature Functionality

Administrators and counselors can now assign groups to themselves, and other professionals included those with limited professional accounts, using the Group Builder in Students and Groups.

The screenshot shows the 'Group Builder' interface. The 'Group Name' section has a text input field containing 'Juniors'. The 'Group Assignment (optional)' section has a list of names: 'Ricardo 23Test (rictest23)', 'Ellen Castin (Ellen_test_360)', and 'Sandy Johnston (sandy_johnston)'. A red arrow points from the 'Group Name' section to the 'Group Assignment (optional)' section. The 'Continue' button is at the bottom center.

Assigning a group to a professional center account

Students can belong to more than one group and professional center accounts can be assigned more than one group. By creating groups, counselors and administrators can more efficiently report on and communicate with those students.

Within their portfolio (Your Portfolio → Your Profile → The Basics), students can see which groups they belong to and which educator(s) they have been assigned to.

The screenshot shows a student's view of their groups and counselor assignments. It displays two sections: 'Counselors I am assigned to:' with the list 'Ellen Castin; Sandy Johnston; Ricardo 23Test;' and 'Groups I am assigned to:' with the list 'Gear-up; AP Physics; Seniors;'.

Student's view of their groups and counselor assignment(s)

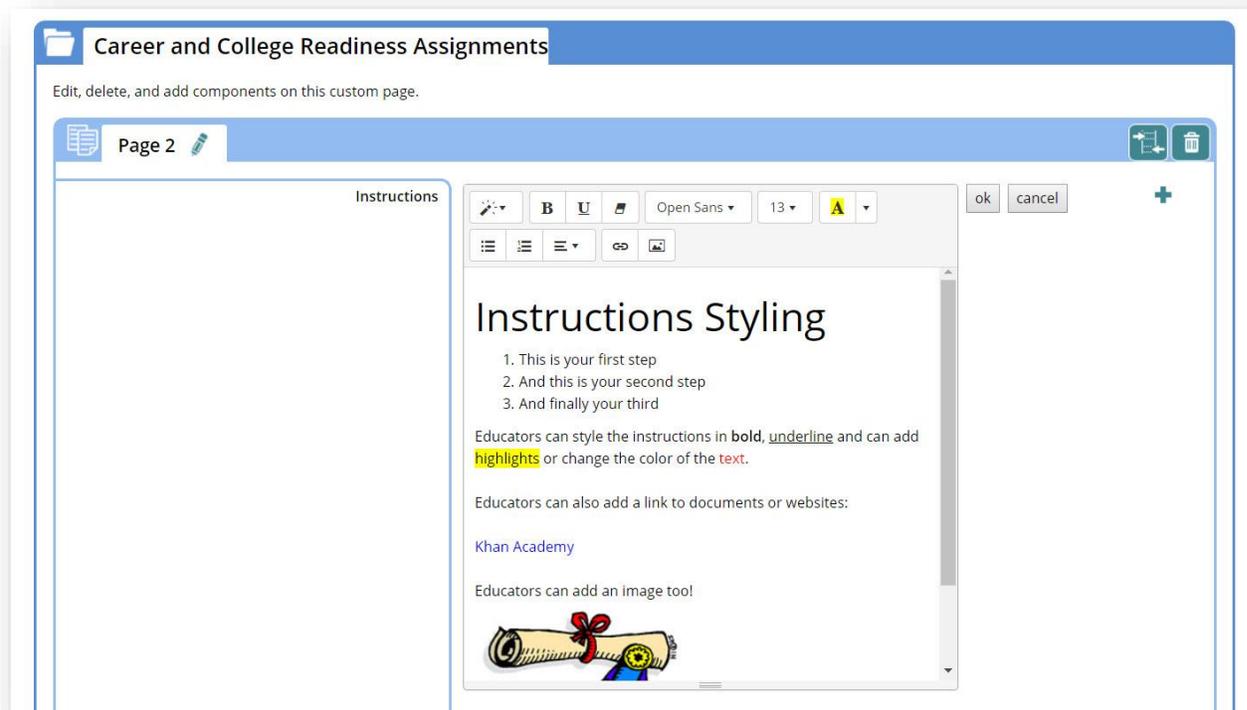
Districts using XAP's SIS Data Integration services can now auto-create limited professional accounts and assign students to professionals (administrator, advisor/counselor and limited professionals). For more information, call your Client Success Leader or 800-468-6927.

7. ENHANCED PRESENTATION OPTIONS WITH ILP TOOL

No more plain text! XAP has enhanced the presentation options for guidance text on pages and within sections within the Individual Learning Plan tool (also known as ICAP, ISP or PGP). Professionals with administrative rights can now:

- Style the text that appears in the student view
- Add links to websites or other sources
- Add images to the guidance text

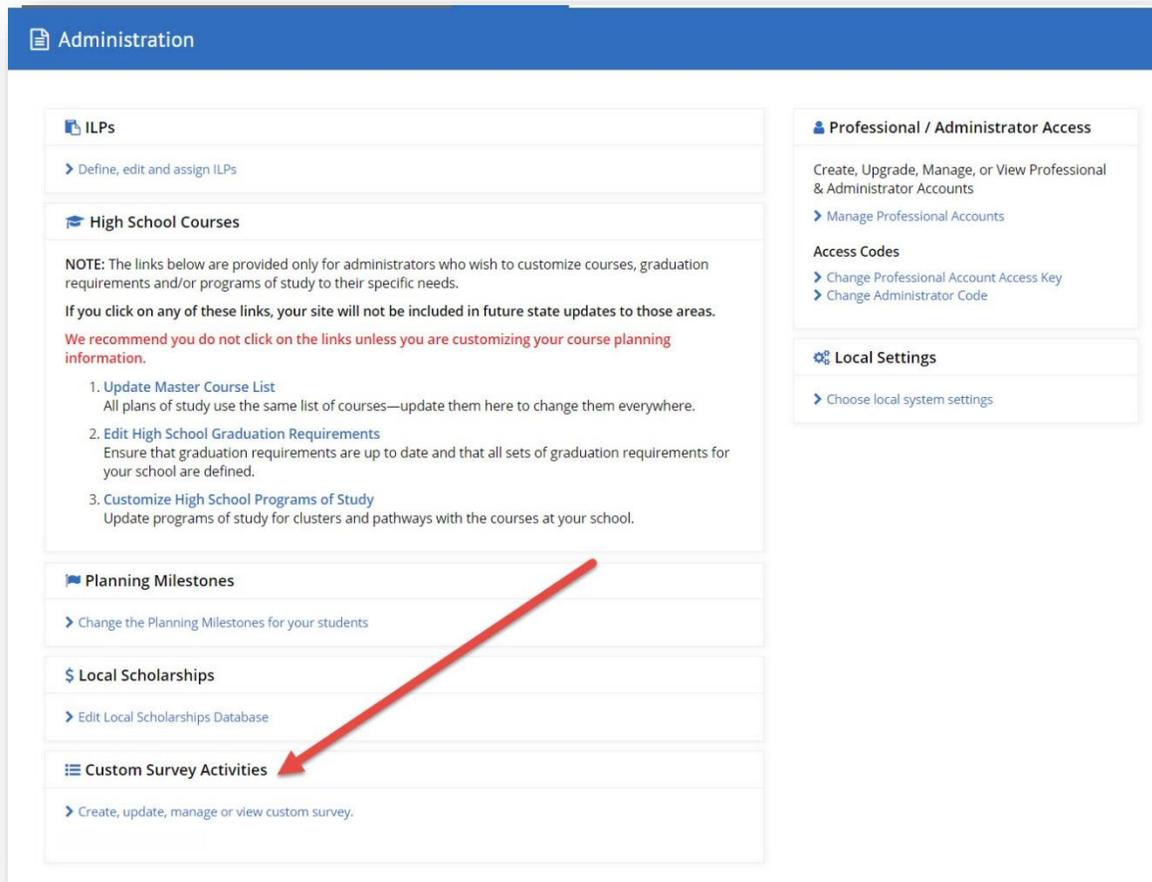
The character limit has also been increased to 900 – giving educators and counselors enough text to give the best possible guidance to their students.



Styling options with the ILP editing tool

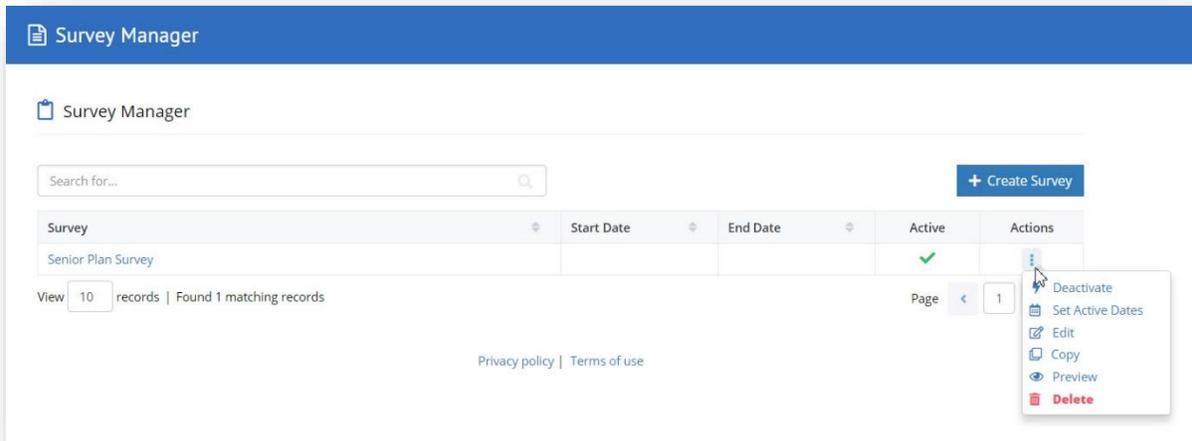
8. PHASE 1 OF THE NEW SURVEYS TOOLS

XAP is introducing phase 1 of the release of a new tool -- custom surveys. In this phase, school educators can create custom surveys to assign to students to complete as an activity with the Individual Learning Plan tool (also known as ICAP, ISP or PGP). Educators with administrative rights in the Professional Center can define and store multiple custom surveys and manage the local list of available surveys.



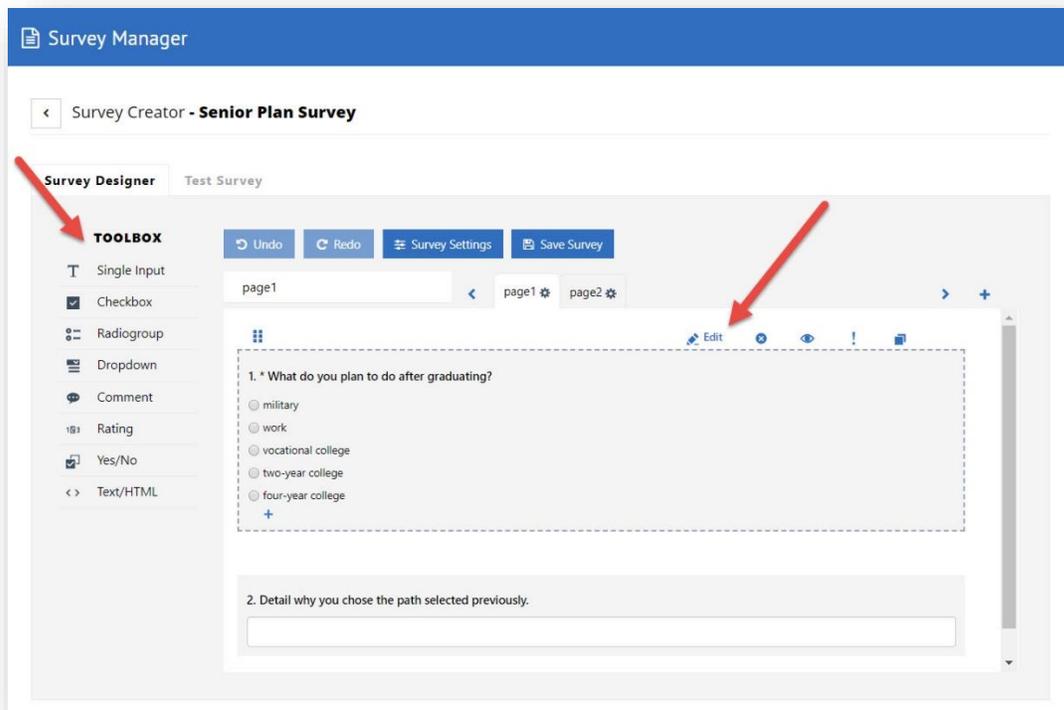
Survey tool in the administration tab

The survey manager gives administrators the ability to create new, edit, delete and activate surveys as well as preview and copy (duplicate). Additionally, administrators can set open and close dates for the survey once it is activated.



Survey manager tool options

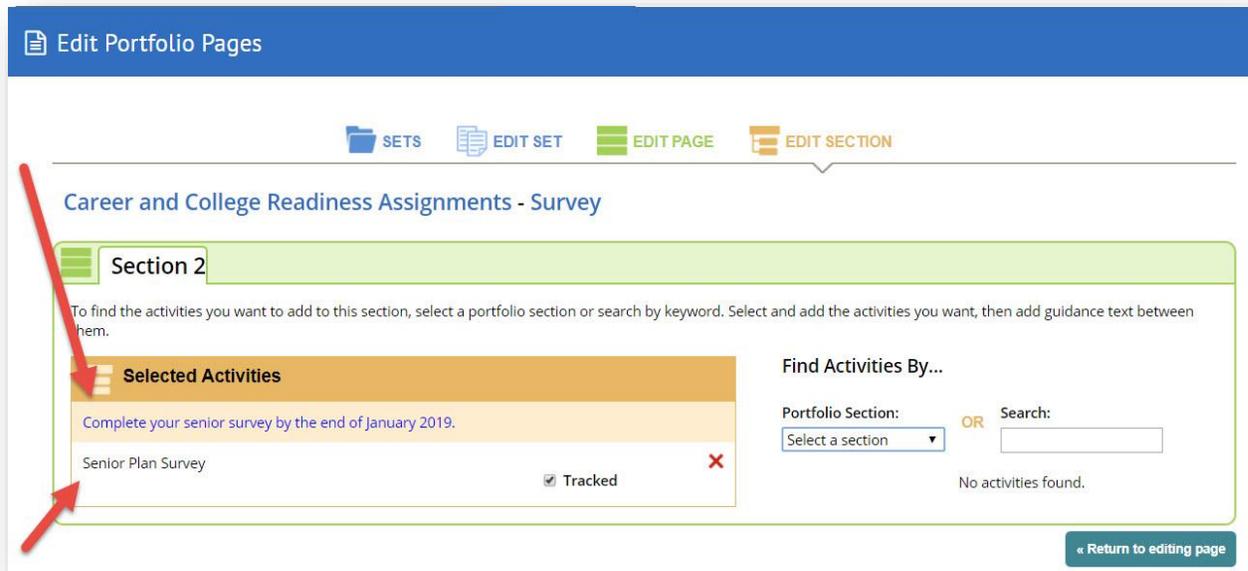
When creating a new survey or editing an existing survey, educators can choose to use text fields, drop-down menus, checkboxes, and radio buttons to support questions requiring single choice, multiple choice, and write-in answers. Once complete, educators must activate the survey using the survey manager tools (in the above screenshot). By activating the survey, the survey becomes available for assigning to students for completion.



Tools for creating and editing a survey

Assigning Surveys to Students to Complete

When a survey is ready (activated), it becomes accessible in the Individual Learning Plan tool (also known as ICAP, ISP or PGP). To have students complete the survey, it must be assigned as an activity with the Individual Learning Plan tool (also known as ICAP, ISP or PGP). Professionals can use the Find Activities By... functionality to locate the survey(s), they would like to assign to students to complete. Once assigned, as with any assigned activity, the survey appears in the student's ILP ready for him or her to complete.



The screenshot shows the 'Edit Portfolio Pages' interface. At the top, there are navigation tabs: 'SETS', 'EDIT SET', 'EDIT PAGE', and 'EDIT SECTION'. Below this, the page title is 'Career and College Readiness Assignments - Survey'. A green bar indicates 'Section 2'. Below the section header, there is a text prompt: 'To find the activities you want to add to this section, select a portfolio section or search by keyword. Select and add the activities you want, then add guidance text between them.' On the left, a 'Selected Activities' box contains a list of activities. The first activity is 'Complete your senior survey by the end of January 2019.' Below it is 'Senior Plan Survey' with a 'Tracked' checkbox and a red 'X' icon. On the right, the 'Find Activities By...' section has a 'Portfolio Section:' dropdown menu with 'Select a section' and a 'Search:' text input field. Below these fields, it says 'No activities found.' At the bottom right, there is a button labeled 'Return to editing page'. Two red arrows point to the 'Selected Activities' box and the 'Senior Plan Survey' activity.

Administrators add surveys as assigned activities using the ILP tool

Students see the assigned survey(s) in their ILP.

Section 2

Complete your senior survey by the end of January 2019.



Senior Plan Survey



Survey of seniors' plans post graduation

> Take this survey.

Survey within a student's ILP



Senior Plan Survey

1. * What do you plan to do after graduating?

- military
- work
- vocational college
- two-year college
- four-year college

2. Detail why you chose the path selected previously.

Next

Page 1 of a sample student survey

The release of the survey tool, professionals can view students' survey results by viewing a student's ILP via his or her portfolio.

Section 2

Complete your senior survey by the end of January 2019.



SENIOR PLAN SURVEY

Survey of seniors' plans post graduation
This survey has been completed.

> [View the completed survey.](#) [Edit the completed survey.](#)

Professional view of a student's survey within an ILP

Phase 2 - What to Expect

In phase 2 of the release of the survey tool, professionals will be able to:

- Assign surveys to parents then track results both for individuals and at an aggregate level.
- Aggregate survey results will be available to professional users for defined and assigned surveys in the surveys tool.
- Survey templates with pre-defined questions.
- District administrators can create, assign and track results for their surveys.

This new tool will provide schools and districts with an effective and flexible survey tool for parents and students that can be embedded into local academic and career planning programs and support measurement of program effectiveness.

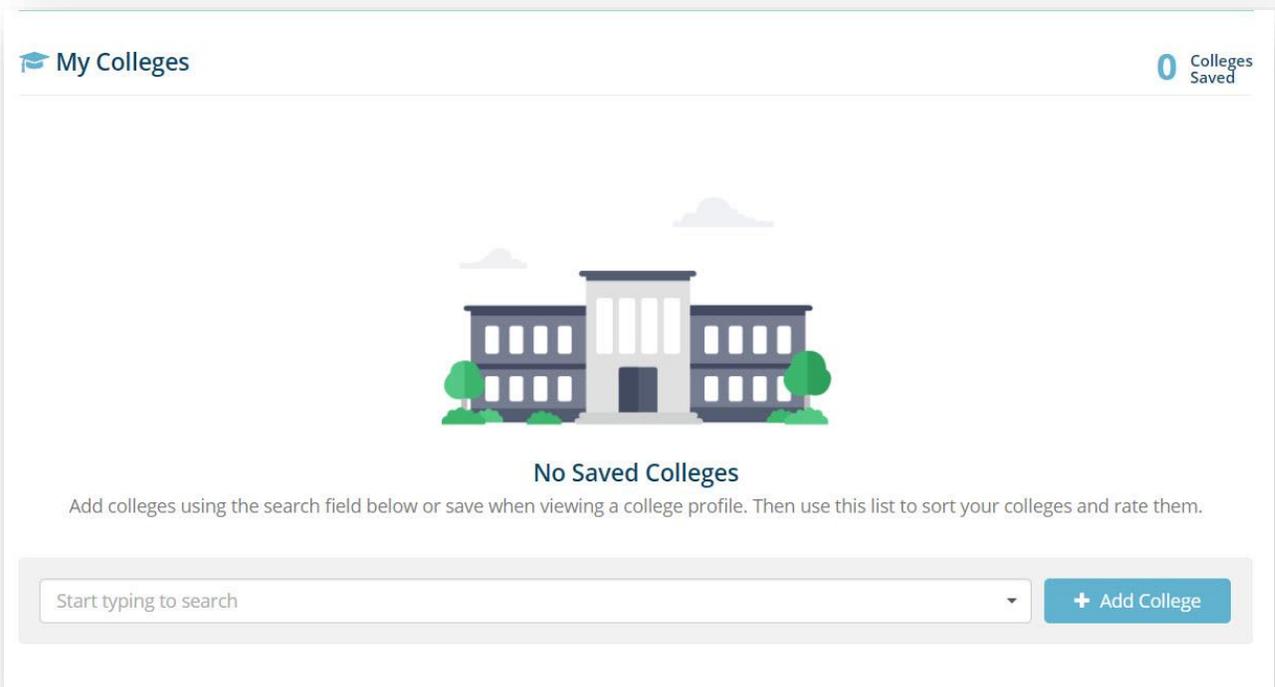
9. UPDATED SAVED COLLEGES AND POSTSECONDARY SCHOOLS ACTIVITY

The portfolio activity, Saved Colleges and Postsecondary Schools has been updated with a fresh new look and new functionality. Students who save colleges or other postsecondary institutions to their Portfolio can now sort, rate, and upload reference documents for each school.



New look for the Saved Colleges and Postsecondary Schools activity

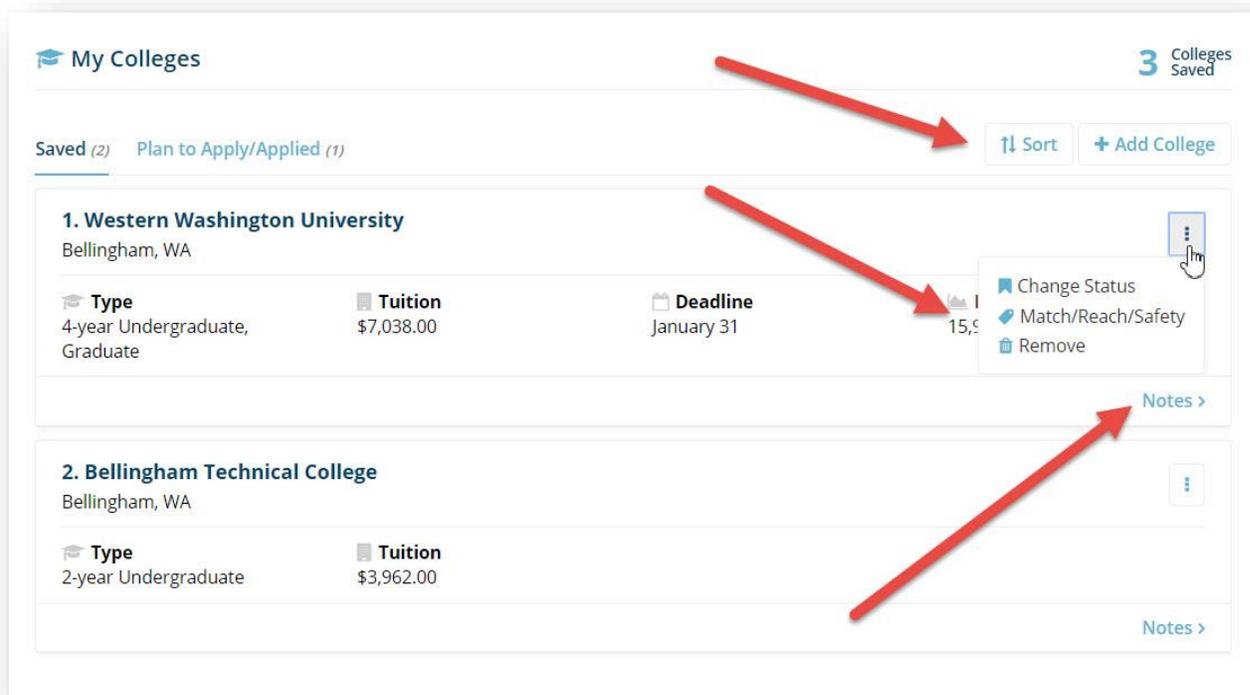
Upon opening the activity, students will see either their saved schools or schools applied to – or if no schools have been saved, students will see an invitation to add schools.



Invitation to add schools if no schools have been saved

Once schools have been added to the activity, the student has the following options:

- Rate the school as reach, match or safety
- Sort the order of the schools
- Change the status of the schools. The available statuses are:
 - None
 - Plan to Apply
 - Applied
 - Accepted
 - Waitlisted
 - Not Accepted
 - Intend to Enroll
- Add more schools
- Add notes for each school
- Upload documents for each school



Options available for saved schools

When students opt to rate their school as match, reach or safety, the system provides helpful guidance text to aid them in making a choice.

Match, Reach, Or Safety

How would you describe your chance for acceptance at Western Washington University?

Match
A match school is one in which a student's transcript mirrors that of the average freshman. Therefore, their GPA, SAT/ACT scores and coursework (college prep, honors, etc.) are all on par with those undergrads typically admitted. While this will not guarantee an acceptance, a student can apply with confidence and the understanding that they have a great shot.

Reach
Reach schools are colleges where a student's academic qualifications are below the average accepted student. However, even if the student's SATs might be 100 points lower than average or they have a 3.4 GPA instead of a 3.8, if they really like the school, they should apply. It could be a long shot but an admissions officer might just see their potential.

Safety
A safety school is one in which the student's academic credentials exceed those of the average accepted student. Consequently, there is a high probability that they will be admitted.

None

Guidance text for rating a school as match, reach or safety

Students are now prompted with a wider range of questions in their notes – or they can add notes without any prompt. Also on this page is the new upload documents feature where students can upload up to 10 MB of files.

Students who added comments in the older version of this activity will find them in the revised notes section.

Notes + New Note

If you visited the school, did you like the facilities? Laboratories? Libraries? Athletics building? Dorms?

Add your note here...

What do you like about this school?

Add your note here...

What do you not like about this school?

Add your note here...

What is the school atmosphere like?

Add your note here...

What is unique about this school?

Add your note here...

What program or faculty are you interested in?

Add your note here...

Uploads

Drag and drop files here to upload

Accepted formats: PDF, DOC, DOCX, JPG, PNG, and TIFF (10MB size limit)

- OR - Choose Files

Students are prompted with more questions and can upload files for each school

The following reports are available for this activity:

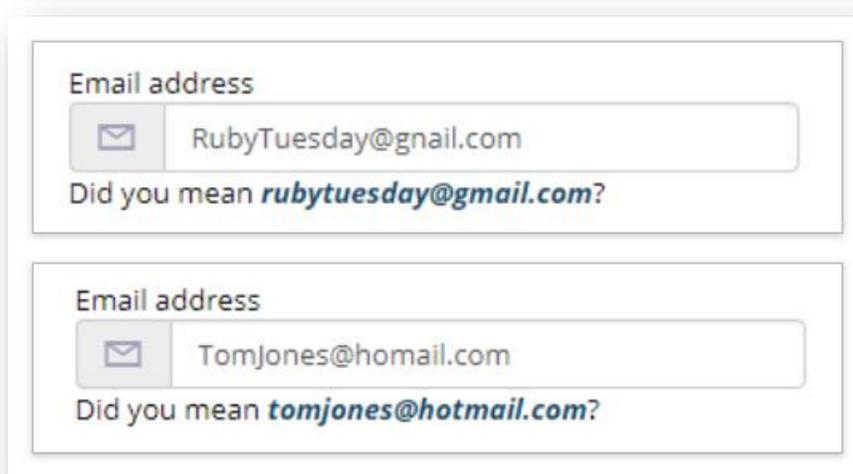
- ILP (also known as ICAP, ISP and PSP) Tracking Report
- College Admittance Status Summary
- Admitted Status Report
- Application Submitted Status Report
- Intend to Enroll Status Report
- Not Admitted Status Report
- Wait-listed Status Report

10. NEW EMAIL DOMAIN CHECK

Each email address added when a student creates an account will now have an additional domain check prior to being validated. The system will check for common domain misspellings such as:

- homail.com
- gamail.com
- gnail.com
- yahooo.com
- yaho.com

When a misspelling is found, the system will prompt the student to check the address.



The image displays two examples of email address validation prompts. Each example consists of a text input field with an email icon on the left, followed by a suggested correction below it.

Example 1: The input field contains "RubyTuesday@gnail.com". Below it, the text reads "Did you mean **rubytuesday@gmail.com?**".

Example 2: The input field contains "TomJones@homail.com". Below it, the text reads "Did you mean **tomjones@hotmail.com?**".

Sample email domain errors and prompts

Students can update their email address if it is incorrect and then continue with the email validation process.