PPIS COACHING TRACKER

Coach Companion

Coaching Connections & Impact Tracker — Operations Manual

Gantt-style school-year tracking, voice-supported notes, IC Map calibration, and Short Cycle evidence for blended instructional-leadership coaching.

Prepared for the PPIS Coaching Tracker application

Covers every screen, process, and control in the app as of the current build

Prepared August 2026

PPIS COACH COMPANION

Contents

This manual is organized to match the app's own navigation order, left to right across the header, top to bottom within each screen. Each entry walks through every screen in that section, paired with a mockup of the real screen so you can recognize it at a glance.

HOW EACH STEP IS WRITTEN

What — a plain description of the feature or field.
Why — the reason it matters, in real coaching or leadership terms.
How — the exact click-by-click action to take.

01 Introduction

What this manual covers, how the app is organized, and how the screenshots are captioned.

SECTION 01 · INTRODUCTION

About this manual

This operations manual documents every screen, form, button, and process in the PPIS Coach Companion application. Each process is described in three consistent parts: what it does (the plain-language function), why it was included (the reasoning behind building it), and how it works (the exact steps to use it). A labeled screenshot placeholder marks where a captured image of that screen belongs; see the note at the end of this Introduction for how those images are inserted.

The manual follows the application's own navigation order, left to right across the header, top to bottom within each screen, so that reading it in sequence mirrors using the app in sequence.

About the application

PPIS Coach Companion — formally titled "Coaching Connections & Impact" on screen — is a school-year coaching tracker built around blended instructional-leadership coaching. Its stated purpose, pinned to the top of the Dashboard, is to document coaching as leadership-capacity development while keeping the center on equitable instructional support, psychological safety, campus implementation, and evidence of student-learning impact.

Functionally, the app combines five things that are traditionally kept in separate spreadsheets, notebooks, and calendar invites: a coaching-relationship roster, a school-year visit schedule, voice-supported session documentation, a formal rating framework (the Instructional Coaching Implementation Map), and a supervisory/self-evaluation system — all cross-linked so that a single coaching interaction automatically updates the calendar, the report log, the Gantt view, and the relevant PDF exports.

How the app is organized

The header, present on every screen, shows the app title and tagline, a live "coachee(s) · session(s)" counter badge, the signed-in user's email, a "? Help & tour" button, and Sign out.

Below the header sits the primary navigation bar with eight sections: Dashboard, Roster, Schedule, Sessions, Coaching tools, Supervision, My Performance, and Exports. Two of these — Sessions and Coaching tools — contain more than one screen and show a second row of sub-tabs; the other six go straight to a single screen. This grouped structure is itself a deliberate design decision, covered in the Cross-Cutting Features chapter at the end of this manual.

About the screenshot placeholders

Every process in this manual includes a labeled placeholder box marking exactly which screen and control it corresponds to. These placeholders are captioned precisely enough to match a screenshot to the right spot — for example, "Dashboard — Visit calendar (month grid with legend chips and export buttons)." To finish the manual with live screenshots, capture each labeled screen in the app and insert the image in place of its matching placeholder box.

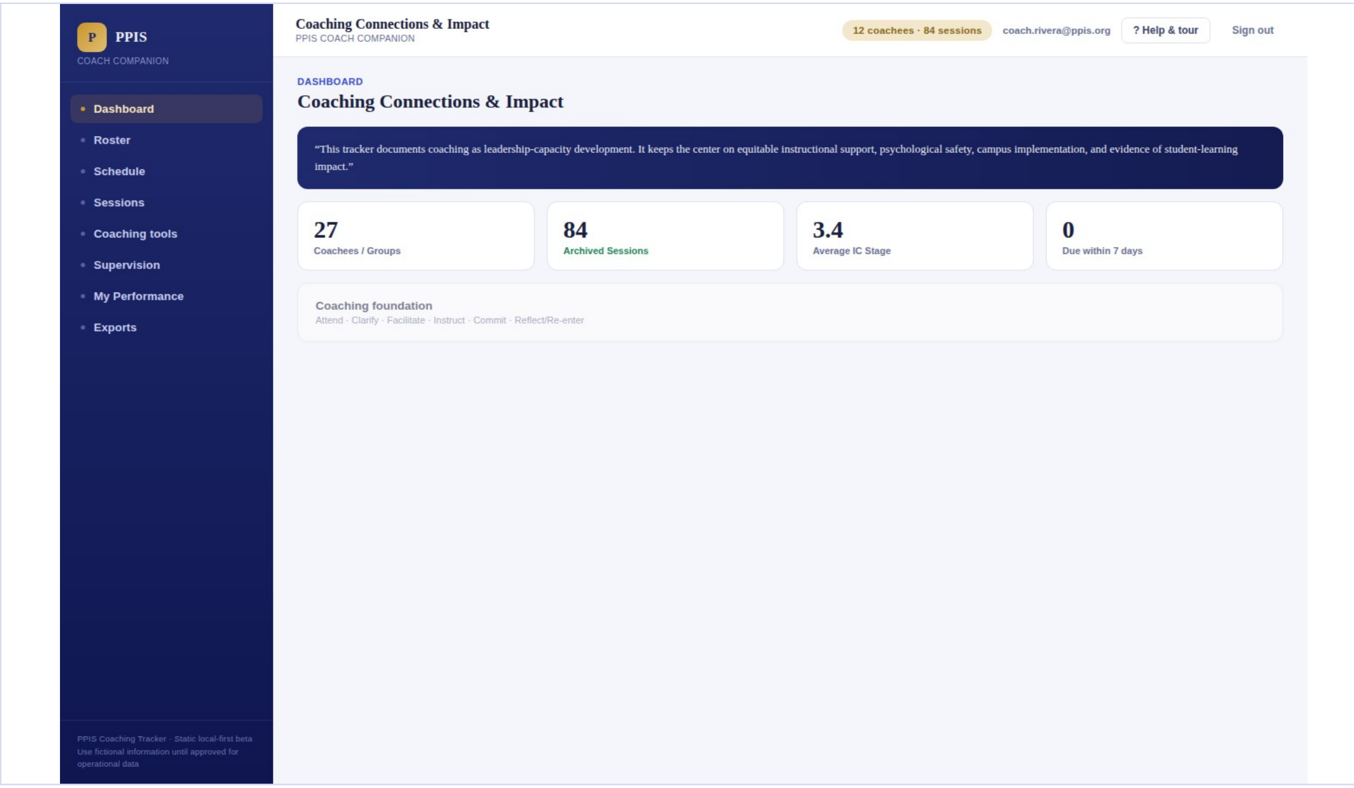
02 Dashboard

The home screen: purpose, caseload counters, coaching-balance charts, and the visit calendar.

Purpose banner • Summary tiles • Coaching foundation • Coaching stance distribution & Coaching frequency by visit pathway • Equity lens distribution & 12-week visit distribution • Add a scheduled visit • Visit calendar

SECTION 02 · DASHBOARD

Purpose banner



WHAT IT DOES

A single fixed statement pinned at the top of the Dashboard: "This tracker documents coaching as leadership-capacity development. It keeps the center on equitable instructional support, psychological safety, campus implementation, and evidence of student-learning impact."

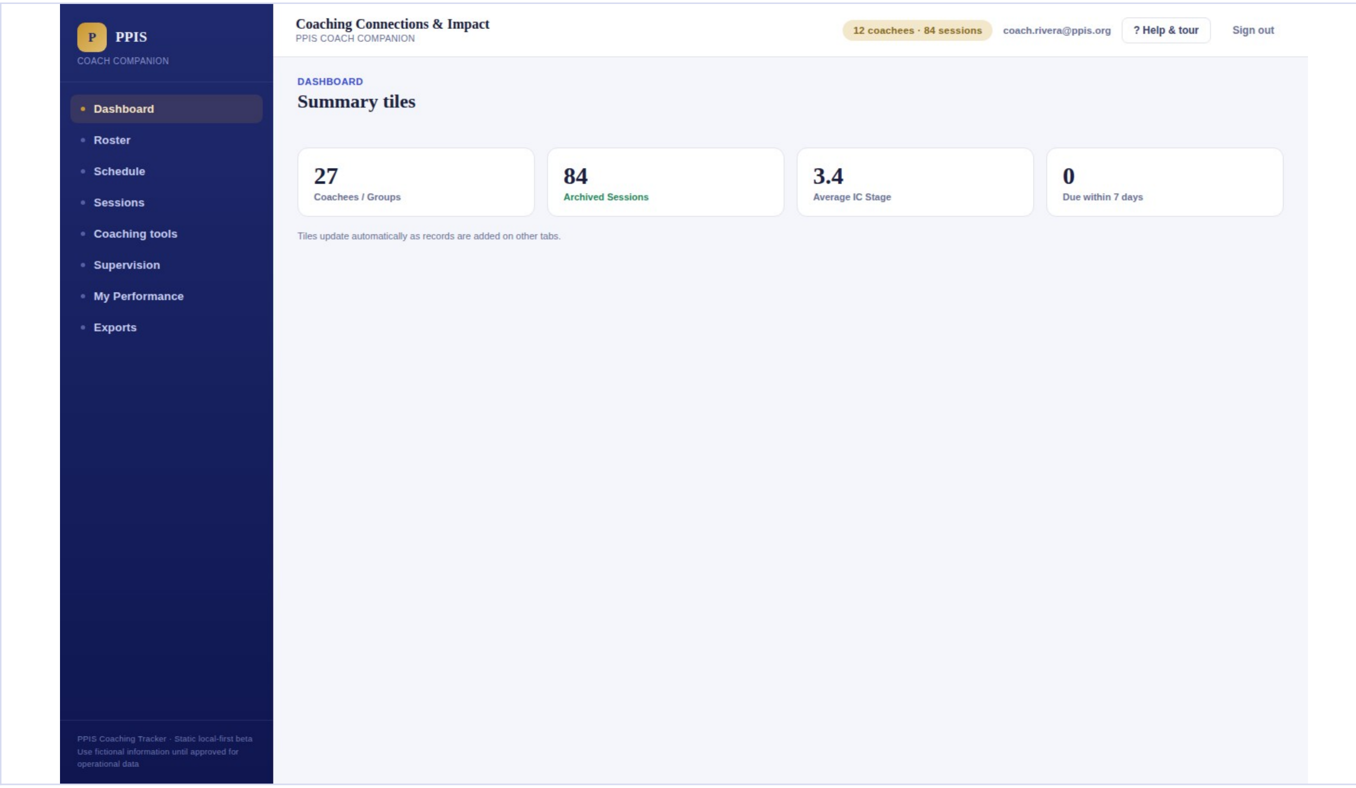
WHY IT WAS INCLUDED

Every other screen in the app exists to serve this statement. Placing it at the very top of the very first screen keeps the program's purpose in front of the coach every time they open the tool, rather than leaving it buried in a policy document nobody re-reads.

HOW IT WORKS

1. This banner is informational only — there is nothing to click. It is not editable from the interface.

Summary tiles



WHAT IT DOES

Four at-a-glance counters: Coachees / Groups (total roster records), Archived Sessions (logged coaching interactions), Average IC Stage (the average Instructional Coaching Implementation Map stage across rated coachees), and Due within 7 days (a follow-up watchlist count).

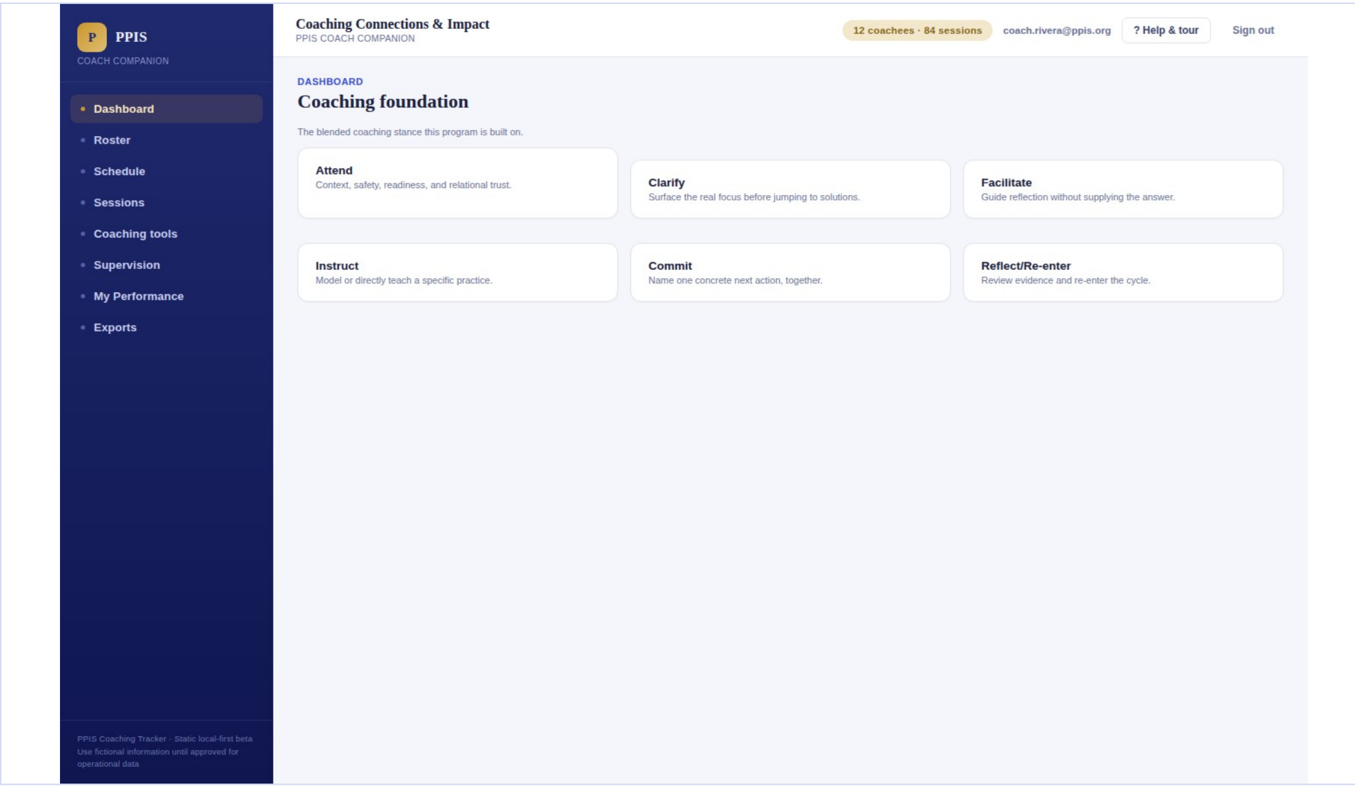
WHY IT WAS INCLUDED

These four numbers are the ones a coach or supervisor most often needs in a hurry — caseload size, activity level, growth trend, and anything about to become overdue. Surfacing them as tiles avoids the need to open Roster, Report log, IC Map, and Supervision separately just to answer "where do things stand?"

HOW IT WORKS

1. Read only — the tiles update automatically as records are added on other tabs.
2. "Due within 7 days" reflects supervision milestones and follow-up reviews; when it reads 0, nothing needs attention this week.

Coaching foundation (blended coaching stance)



WHAT IT DOES

Six cards describing the blended coaching stance the program is built on: Attend, Clarify, Facilitate, Instruct, Commit, and Reflect/Re-enter — each with a short description of what that stance means in practice (for example, Attend covers "context, safety, readiness, and relational trust").

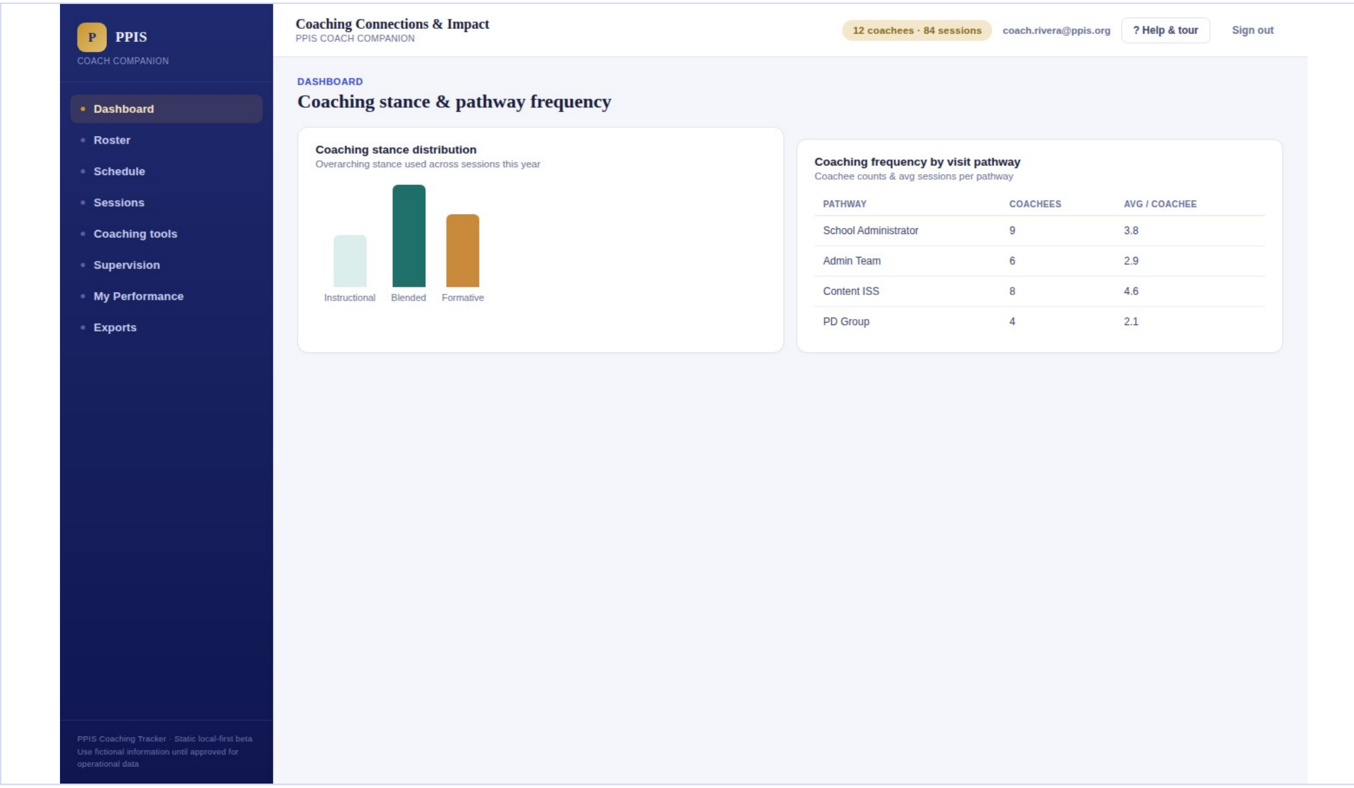
WHY IT WAS INCLUDED

Blended coaching intentionally moves between facilitative and instructional approaches rather than picking one permanently. Keeping the full six-stance vocabulary visible on the home screen reinforces a shared language coaches and supervisors use elsewhere in the app — including the Coaching Stance field on every session note.

HOW IT WORKS

1. Read-only reference cards. Scroll the Dashboard to see all six; they are not links.

Coaching stance distribution & Coaching frequency by visit pathway



WHAT IT DOES

Two chart panels: one shows the overarching stance used across sessions this year (Instructional, Formative, or Blended); the other breaks archived-session counts down by the four visit pathways — School Administrator, Admin Team, Content ISS, and Professional Development Group — showing coachee counts and average sessions per pathway.

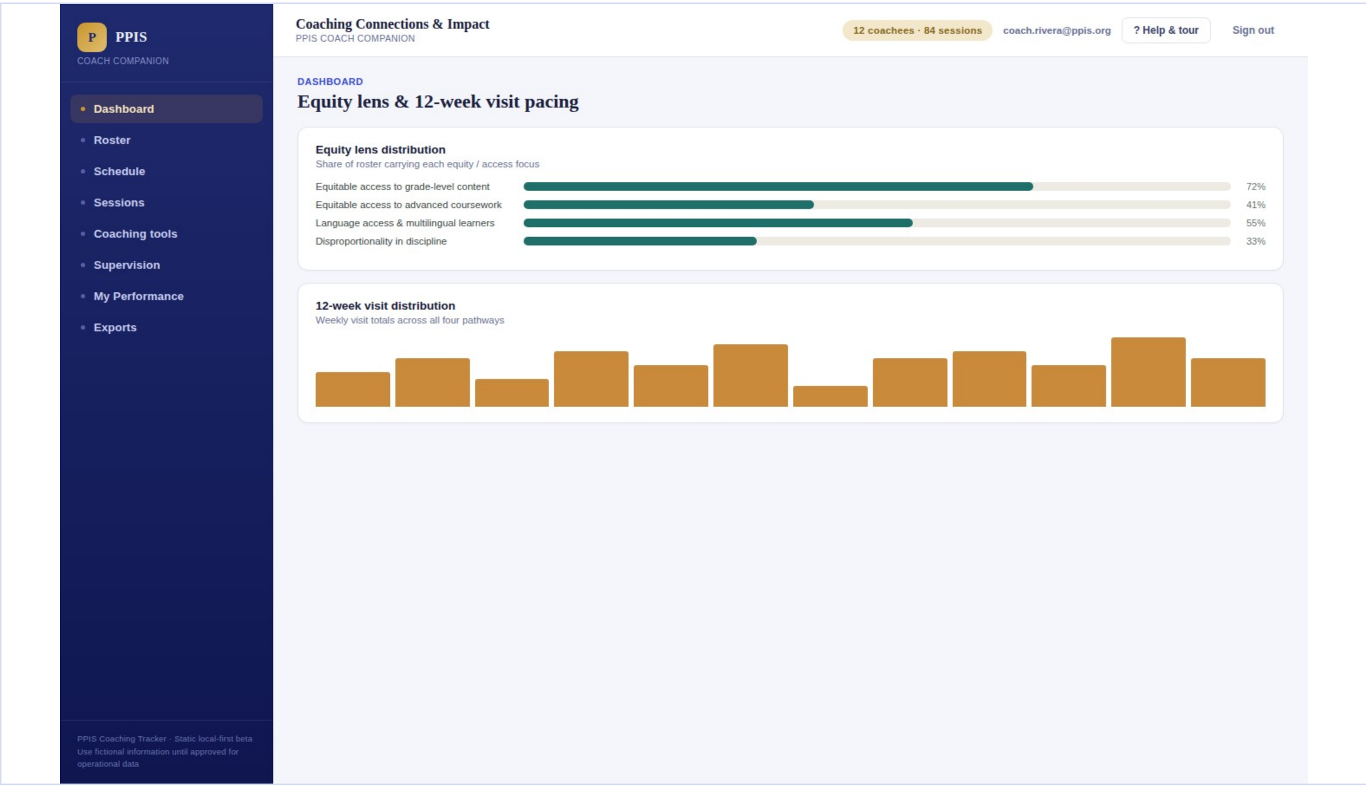
WHY IT WAS INCLUDED

A program that only coaches one pathway, or leans entirely instructional instead of blended, is a red flag for equity of service. These charts let a coach or supervisor catch an imbalance early rather than discovering it at year-end.

HOW IT WORKS

1. Read-only. Both panels recalculate automatically as sessions are archived from the Session workspace.

Equity lens distribution & 12-week visit distribution



WHAT IT DOES

A horizontal bar chart showing what share of the roster carries each equity/access focus (for example "Equitable access to..."), and a 12-week stacked bar chart showing weekly visit totals across all four visit pathways.

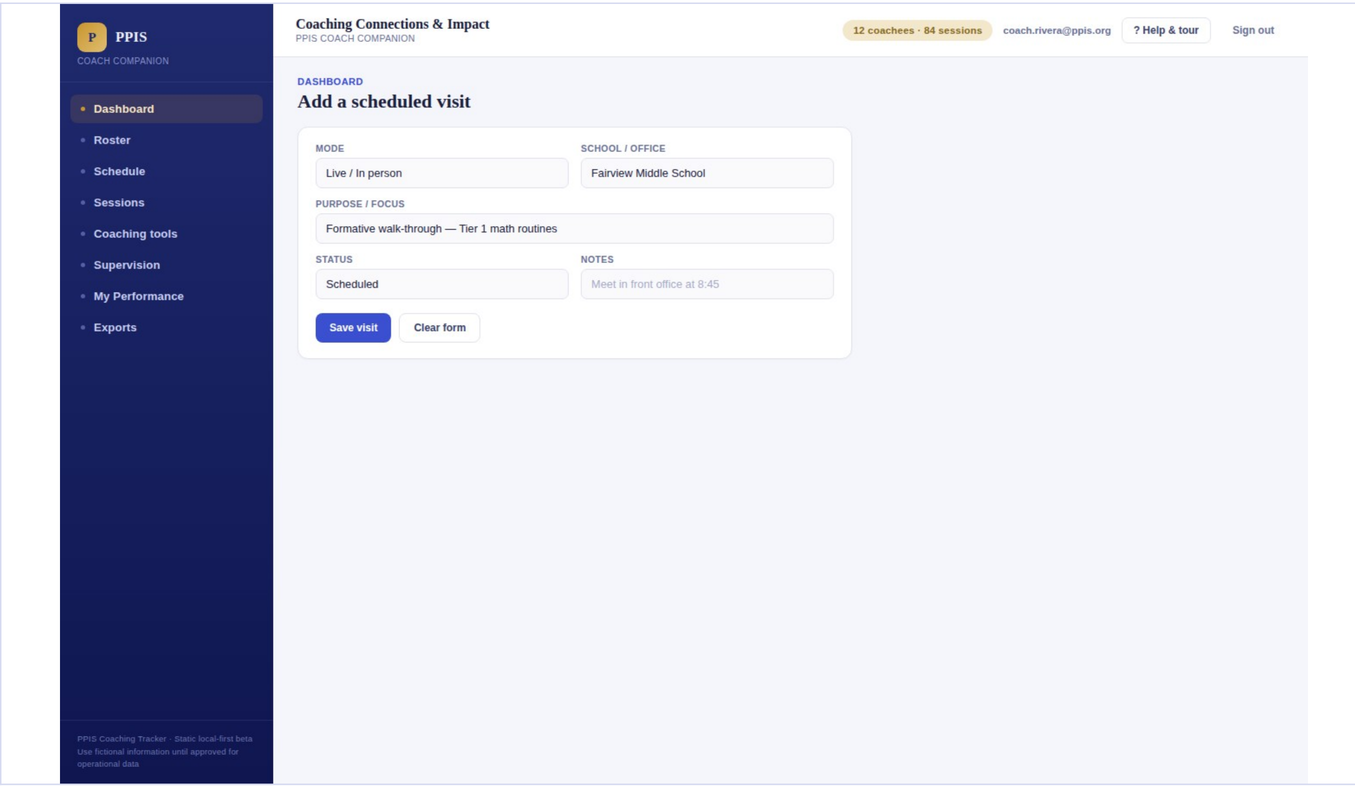
WHY IT WAS INCLUDED

These two charts turn the program's equity commitment from an aspiration into a number that can be tracked over time, and let a coach see visually whether visit pacing is level across the school year or clustered unevenly.

HOW IT WORKS

1. Read-only. Hover or scroll to see the full 12-week window; older weeks scroll into view.

Add a scheduled visit



WHAT IT DOES

A short form (Mode, School/Office, Purpose/Focus, Status, Notes) with Save visit and Clear form buttons, used to place a planned visit on the calendar before it happens.

WHY IT WAS INCLUDED

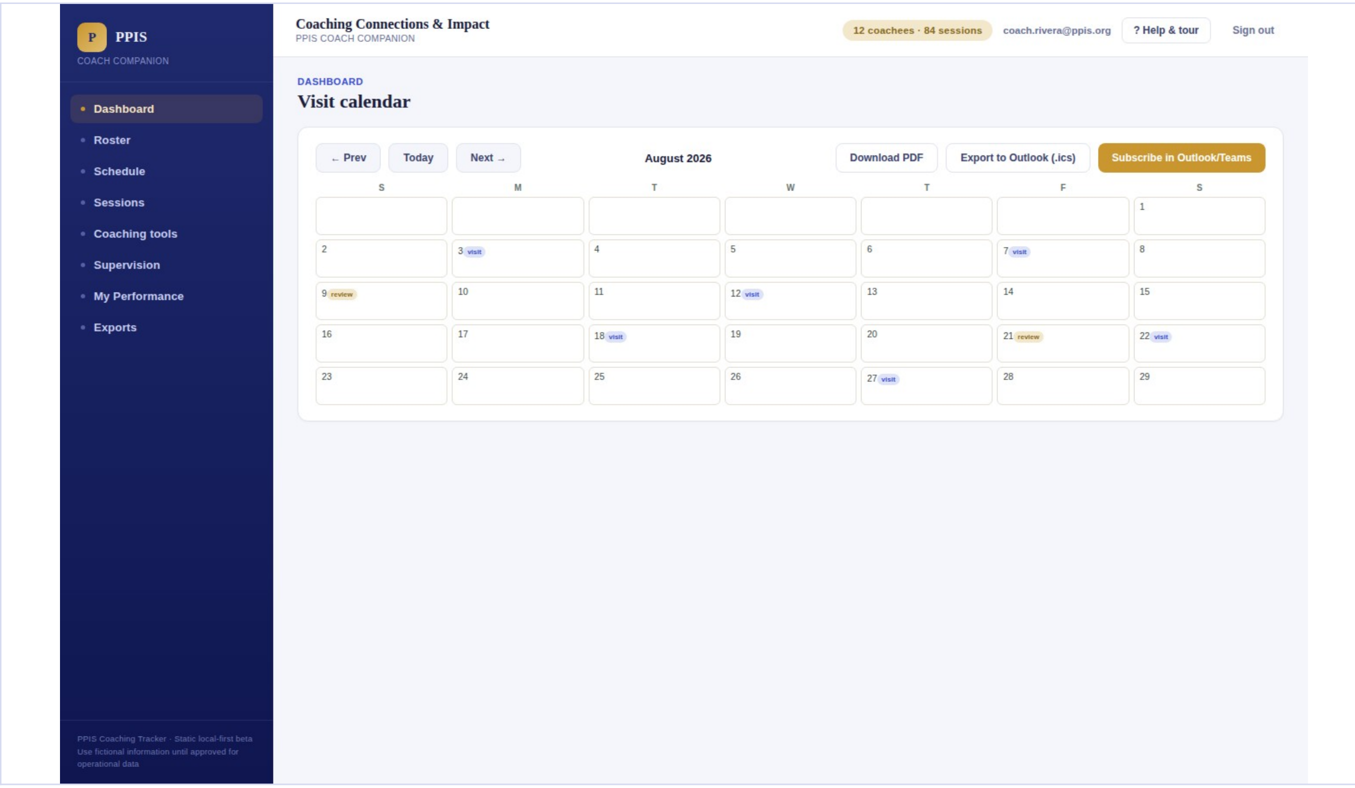
Coaching only shows up as "equitable" and "evidence-based" if it is planned, not just logged after the fact. Scheduling visits ahead of time is what feeds the Gantt view, the Dashboard calendar, and the due-date logic elsewhere in the app.

HOW IT WORKS

1. Set Mode (e.g., Live / In person), pick or confirm the School/Office (auto-fills from the roster once a coachee is chosen elsewhere), enter a Purpose/Focus and any logistics Notes.
2. Click Save visit to add it to the calendar, or Clear form to start over.
3. A scheduled visit appears on the calendar below and on the Schedule (Gantt) tab; once the interaction actually happens, it is documented in full on the Session workspace.

SECTION 02 · DASHBOARD

Visit calendar



WHAT IT DOES

A month-view calendar (Prev / Today / Next navigation) showing planned visits, archived sessions, follow-up reviews, and supervision deadlines as color-coded chips, with filters by school/office and coachee, a Show dropdown, and Download PDF / Export to Outlook (.ics) / Subscribe in Outlook or Teams actions.

WHY IT WAS INCLUDED

A calendar is the format most coaches and supervisors already trust for "what's happening when." Making it exportable and subscribable means the coaching schedule can live inside a coach's existing Outlook or Teams calendar instead of requiring them to remember to open this app every day.

HOW IT WORKS

1. Use Prev / Next / Today to move between months; the FILTER BY SCHOOL/OFFICE and FILTER BY COACHEE dropdowns narrow what's shown.
2. Click any entry on the calendar to open its underlying session note.
3. Click Download PDF for a static copy of the current view (range controlled by the PDF RANGE dropdown), or Export to Outlook (.ics) to save a one-time calendar file.
4. Click Subscribe in Outlook/Teams to get a live feed URL that keeps updating automatically as new visits and deadlines are added, instead of going stale like a one-time export.

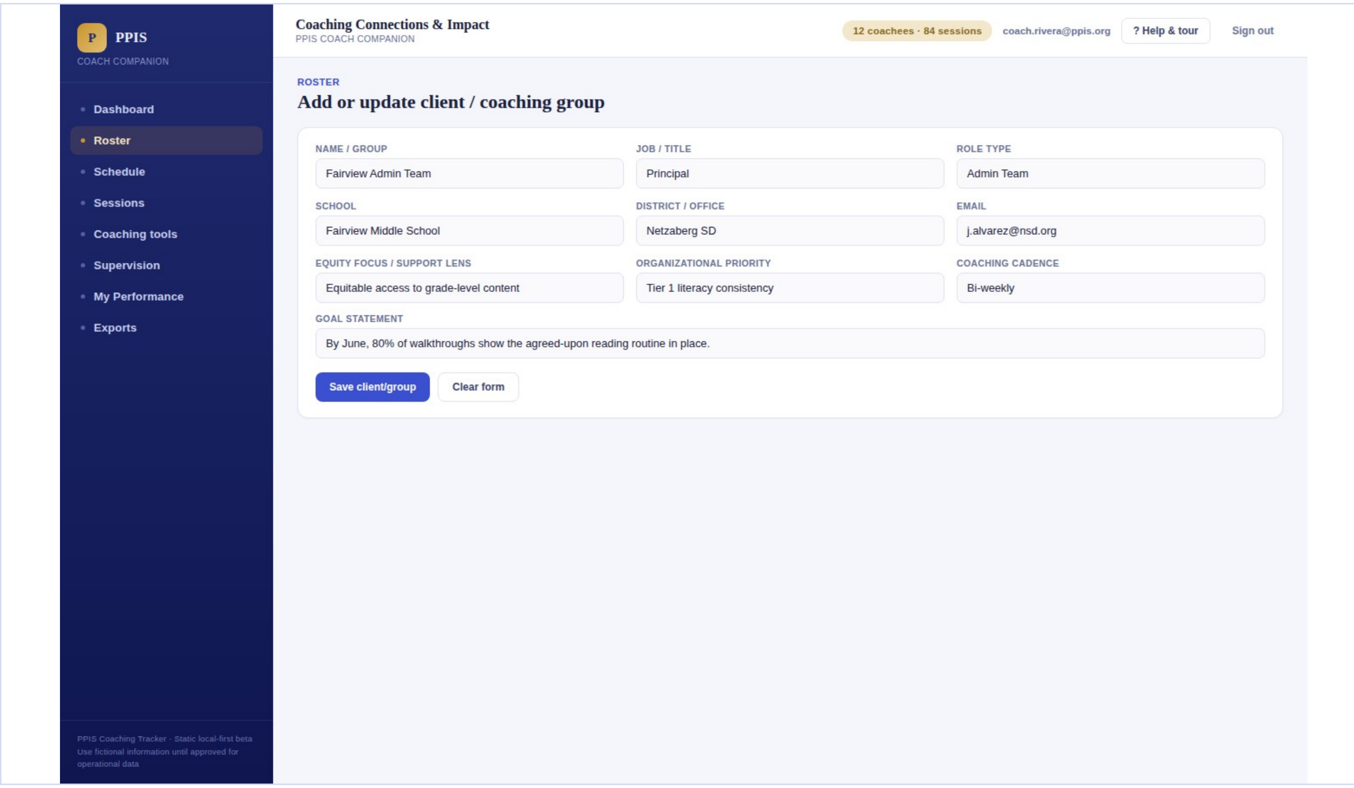
03 Roster

The single source of truth for every coachee and group, plus batch import and portfolio branding.

Add or update client / coaching group • Batch upload from Excel/CSV • Portfolio PDF template • Roster table

SECTION 03 • ROSTER

Add or update client / coaching group



WHAT IT DOES

A form capturing Name/Group, Job/Title, Role Type, School, District/Office, Email, Equity Focus/Support Lens, Organizational Priority, Coaching Cadence, Start Date, and a free-text Goal Statement.

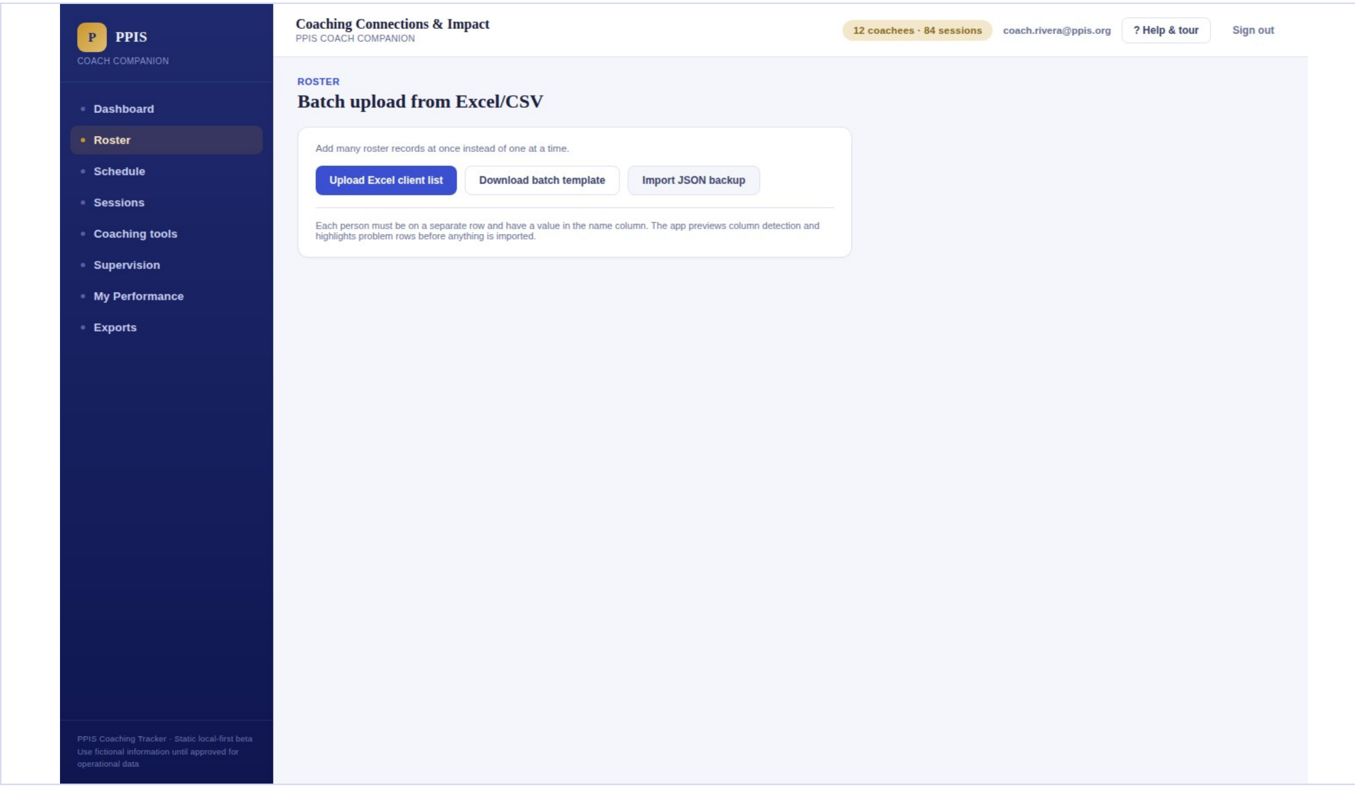
WHY IT WAS INCLUDED

Everything downstream — scheduling, session notes, agreements, supervision records, the Gantt view — depends on a clean, complete roster entry existing first. Capturing the equity focus and organizational priority up front is what lets the Dashboard's equity-lens chart mean something.

HOW IT WORKS

1. Choose a Role Type (School Administrator, Admin Team, Content ISS, or PD Group) — this determines which visit pathway the person is grouped under everywhere else in the app.
2. Fill in the remaining fields; School and Coaching Cadence drive the filters used on Schedule and Dashboard.
3. Click Save client/group to add the record, or Clear form to reset the fields.
4. To edit an existing person, find them in the Roster table below and click Edit — this copies their record back into the form above for editing, it does not start an import.

Batch upload from Excel/CSV



WHAT IT DOES

Upload Excel client list and Download batch template buttons, plus an Import JSON backup option, for adding many roster records at once instead of one at a time.

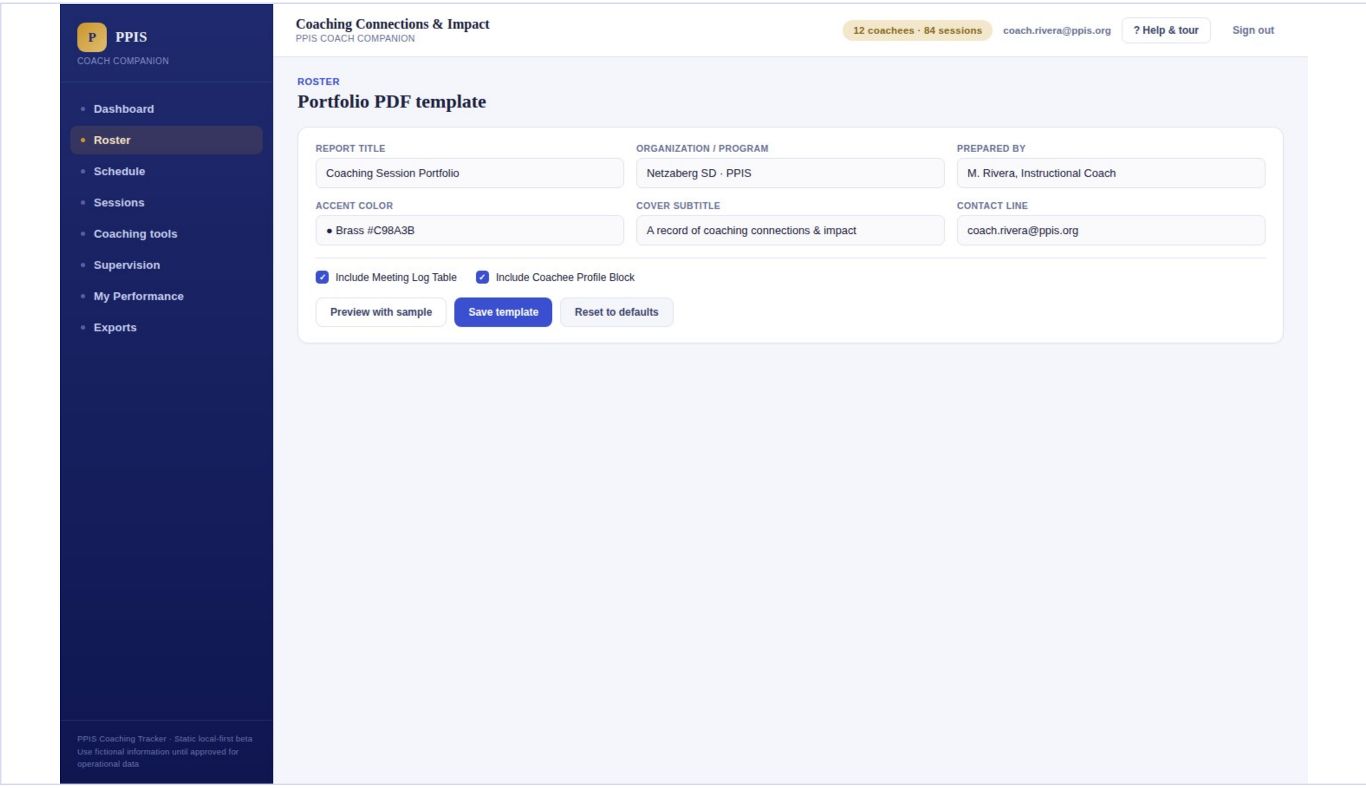
WHY IT WAS INCLUDED

Programs onboarding a full caseload of 20–30+ coachees at the start of a school year would lose hours re-typing what already exists in a district spreadsheet. Batch upload turns that into a five-minute import.

HOW IT WORKS

1. Click Download batch template to get a correctly-columned starter file.
2. Click Upload Excel client list, choose the file — the app shows a preview table with automatic column detection and highlights any problem rows before anything is imported.
3. Review the preview, confirm under Full roster, then click Import. Each person must be on a separate row and have a value in the name column.
4. Import JSON backup restores a full roster previously saved with Full JSON backup (see Exports).

Portfolio PDF template



WHAT IT DOES

A branding/configuration panel (Report Title, Organization/Program, Prepared By, Accent Color, Cover Subtitle, Contact Line, Include Meeting Log Table, Include Coachee Profile Block, Footer/Confidentiality note, plus logo upload) that controls the cover page and layout used on every coachee's session-notes portfolio PDF.

WHY IT WAS INCLUDED

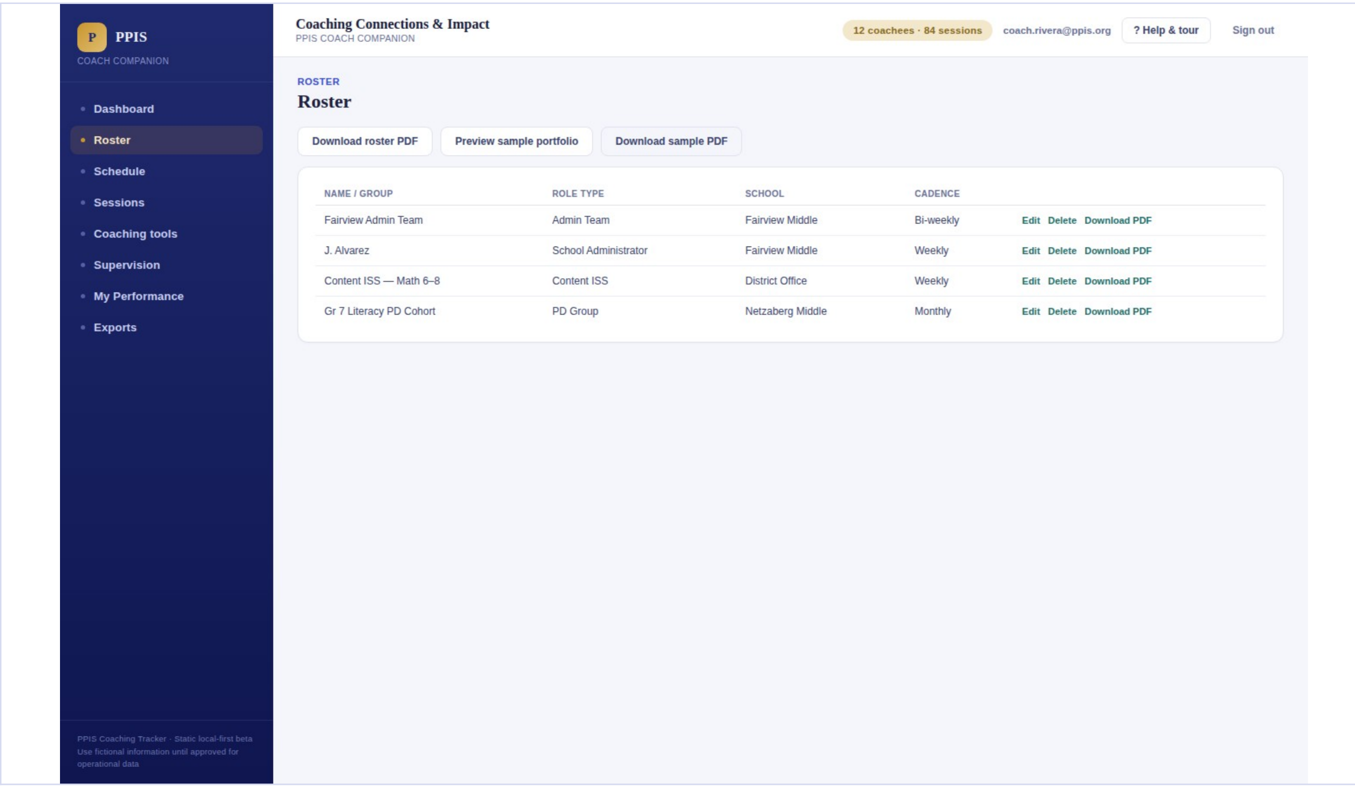
When a coach hands a printed portfolio to a coachee or a supervisor, it should look like an intentional, professional deliverable — not a raw data export. Setting this once means every portfolio generated afterward is consistently branded without re-configuring it per coachee.

HOW IT WORKS

1. Fill in the cover details and, optionally, Upload logo.
2. Toggle Include Meeting Log Table and Include Coachee Profile Block depending on how much detail the portfolio should contain.
3. Click Preview with sample to check the layout, then Save template to apply it to future downloads (settings are saved on this device). Reset to defaults undoes customization.
4. This template is what Download PDF (per roster row) and Coachee portfolios (on the Exports hub) both use.

SECTION 03 · ROSTER

Roster table



WHAT IT DOES

The full list of imported/added roster records, each with Edit, Delete, and Download PDF actions, plus Download roster PDF, Preview sample portfolio, and Download sample PDF buttons above the table.

WHY IT WAS INCLUDED

This is the working view of the caseload — the place a coach scans to confirm who is on their list, fix a mistake, or hand someone their individual portfolio without digging through session notes manually.

HOW IT WORKS

1. Click Edit on any row to load that person back into the form above for changes.
2. Click Delete to permanently remove a record (there is no undo, so export a backup first if in doubt).
3. Click Download PDF on a row to generate that one person's session-notes portfolio using the template configured above.
4. Click Download roster PDF for the whole caseload as one document.

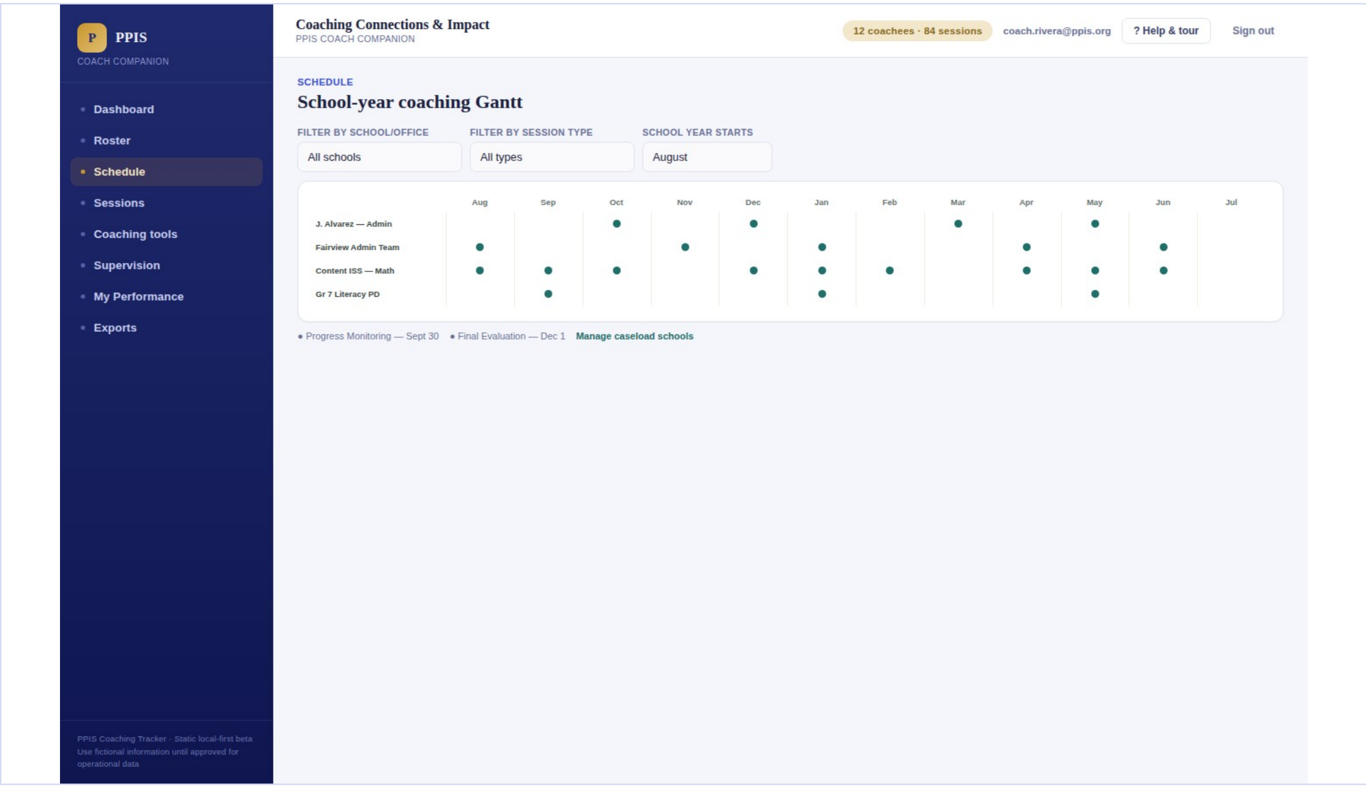
04 Schedule

The whole caseload's coaching pattern laid out across the school year in one Gantt view.

School-year coaching Gantt

SECTION 04 • SCHEDULE

School-year coaching Gantt



WHAT IT DOES

A row-per-coachee, column-per-month grid (August through July) where every archived coaching interaction appears as a colored marker, plus Supervision milestone markers (Progress Monitoring, Sept 30; Final Evaluation, Dec 1) for each Content ISS.

WHY IT WAS INCLUDED

A list of session notes tells you what happened; a Gantt view tells you what's missing. Rows with long empty stretches are exactly the equity and consistency gaps the program purpose statement is meant to prevent — this view makes them visible without any extra analysis.

HOW IT WORKS

1. Use FILTER BY SCHOOL/OFFICE and FILTER BY SESSION TYPE to narrow the rows shown; the school filter choice is remembered between visits.
2. SCHOOL YEAR STARTS sets which month begins the grid (default August); VIEW switches how connections are displayed.
3. Click any marker to open that interaction's session note; page through neighboring entries with Previous/Next from inside the note, print it, or open it directly in the Session workspace for editing.
4. Expand Manage caseload schools to add or edit the list of schools used across every filter and dropdown in the app, so they stay consistent.

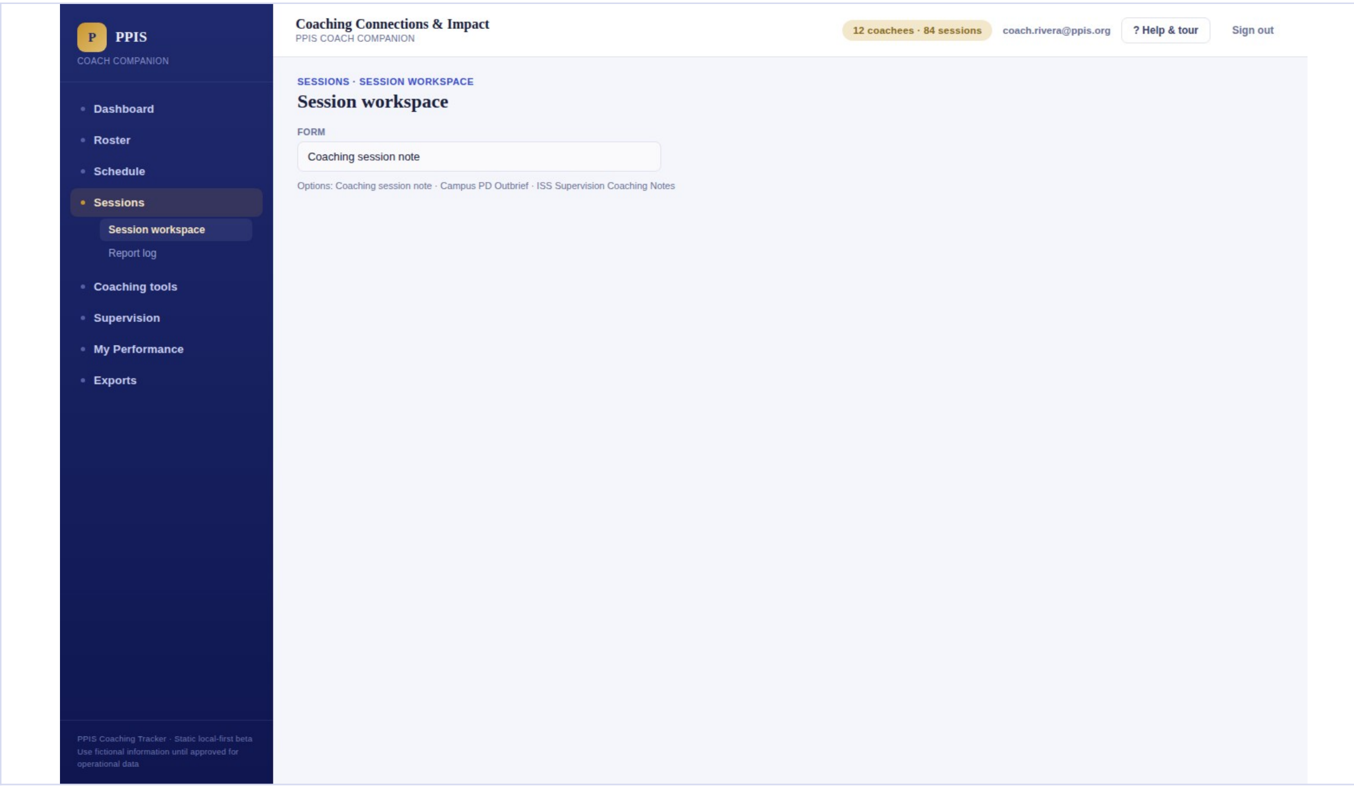
05 Sessions

Where every coaching interaction is documented — the Session workspace and the Report log.

Document type switch • Session identification & context • Session brief • Voice-supported notes • Narrative fields with inclusion checkboxes • IC Map quick rating & Cycle status • Save session notes / New session • Report log

SECTION 05 • SESSIONS

Document type switch



WHAT IT DOES

A single Form dropdown — Coaching session note, Campus PD Outbrief, or ISS Supervision Coaching Notes — that determines which fields appear below. Only the selected document type is shown, saved, and used in the notes modal, printed notes, and PDF/exports.

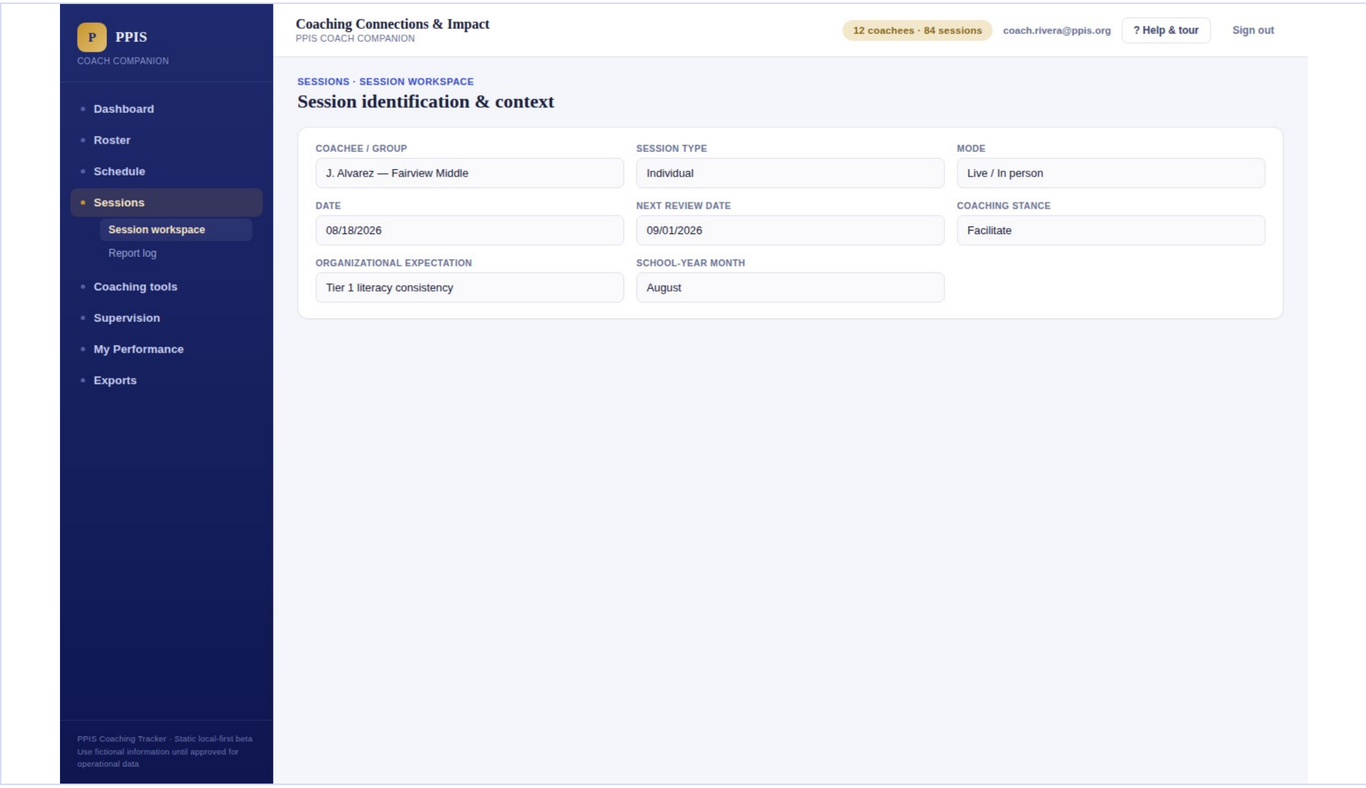
WHY IT WAS INCLUDED

A one-on-one coaching visit, a campus-wide PD outbrief, and a formal ISS supervision note need genuinely different fields. Rather than building three separate tabs (which was the pattern before a recent redesign), one entry point with a type switch keeps the workspace simple while still producing the right document for the right situation.

HOW IT WORKS

1. Select the document type before filling anything in — switching afterward changes which fields are shown and saved.

Session identification & context



WHAT IT DOES

Coachee/Group, Session Type (Individual, etc.), Mode, Date, Next Review Date, Coaching Stance, Organizational Expectation, and School-Year Month fields.

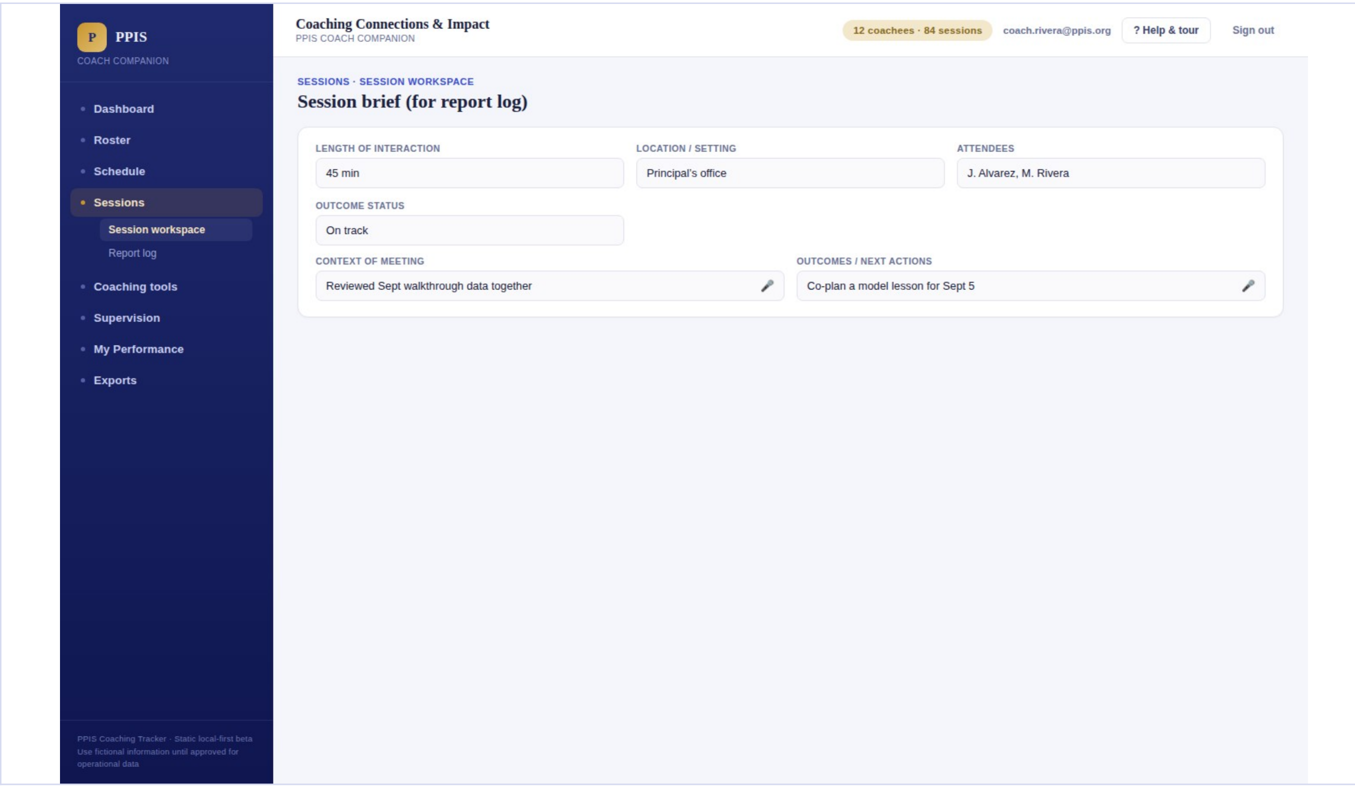
WHY IT WAS INCLUDED

This is the metadata that lets a single session note be found later by coachee, by date, by stance, or by month — and it is what auto-fills the Gantt marker, the calendar entry, and the report-log row for this interaction.

HOW IT WORKS

1. Pick the Coachee/Group first — several other fields (school, cadence) auto-fill from the Roster record once a coachee is selected, and the session auto-links to any matching scheduled visit from the Dashboard calendar.
2. Set Coaching Stance to whichever of the blended-coaching stances (see Dashboard) best matches how this session actually ran.

Session brief (for report log)



WHAT IT DOES

A short record-of-interaction block — Length of Interaction, Location/Setting, Attendees, Outcome Status, Context of Meeting, and Outcomes/Next Actions — required for the downloadable session note and the Report log.

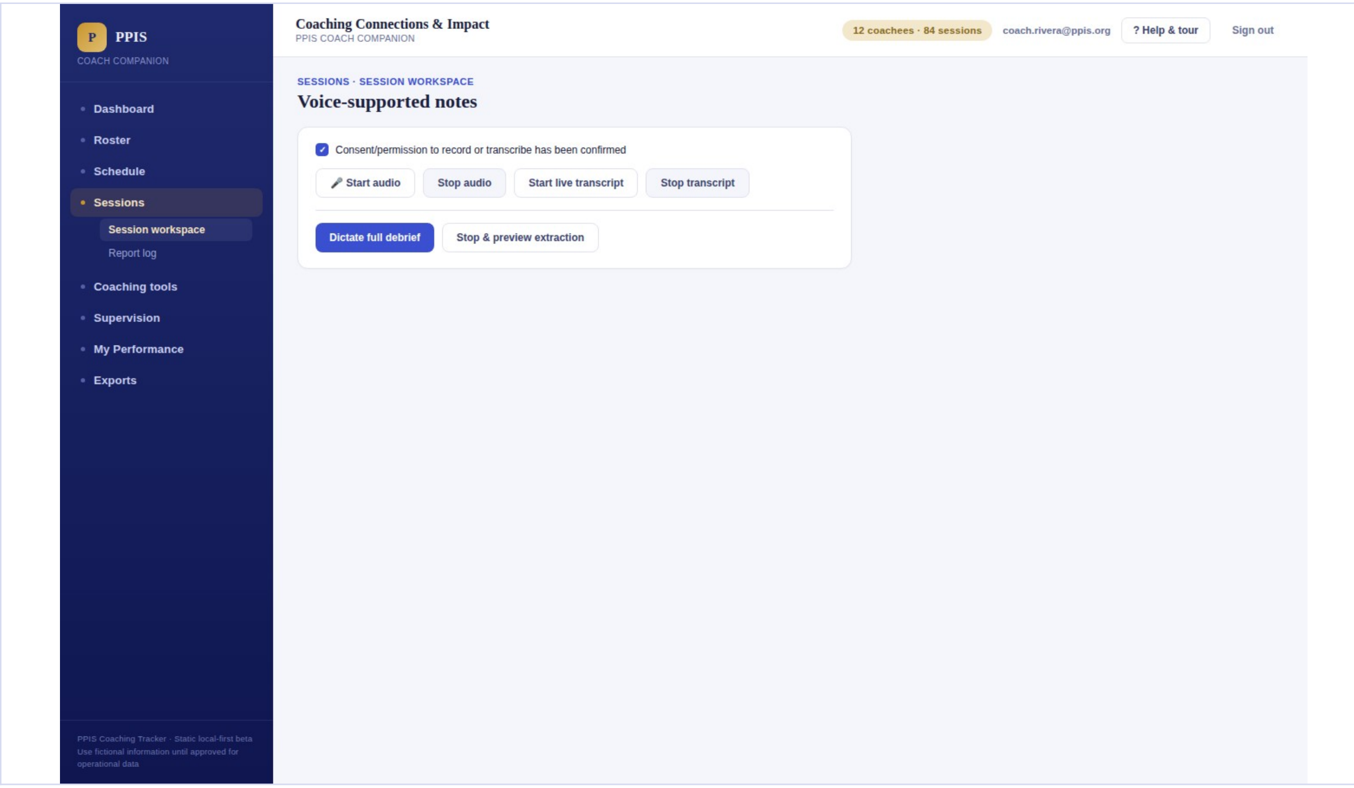
WHY IT WAS INCLUDED

Not every reader needs the full narrative notes below; a supervisor scanning the Report log needs a two-sentence summary. This block is what populates that summary view, so it is kept mandatory even though the fuller narrative fields are optional.

HOW IT WORKS

1. Fill in all fields — this section feeds the Report log directly.
2. Use the Dictate button beside Context of Meeting or Outcomes/Next Actions to speak the summary instead of typing it.

Voice-supported notes (dictation)



WHAT IT DOES

A consent checkbox plus Start/Stop audio, Start/Stop live transcript, Dictate full debrief, and Stop & preview extraction controls that let a coach speak a session recap instead of typing it.

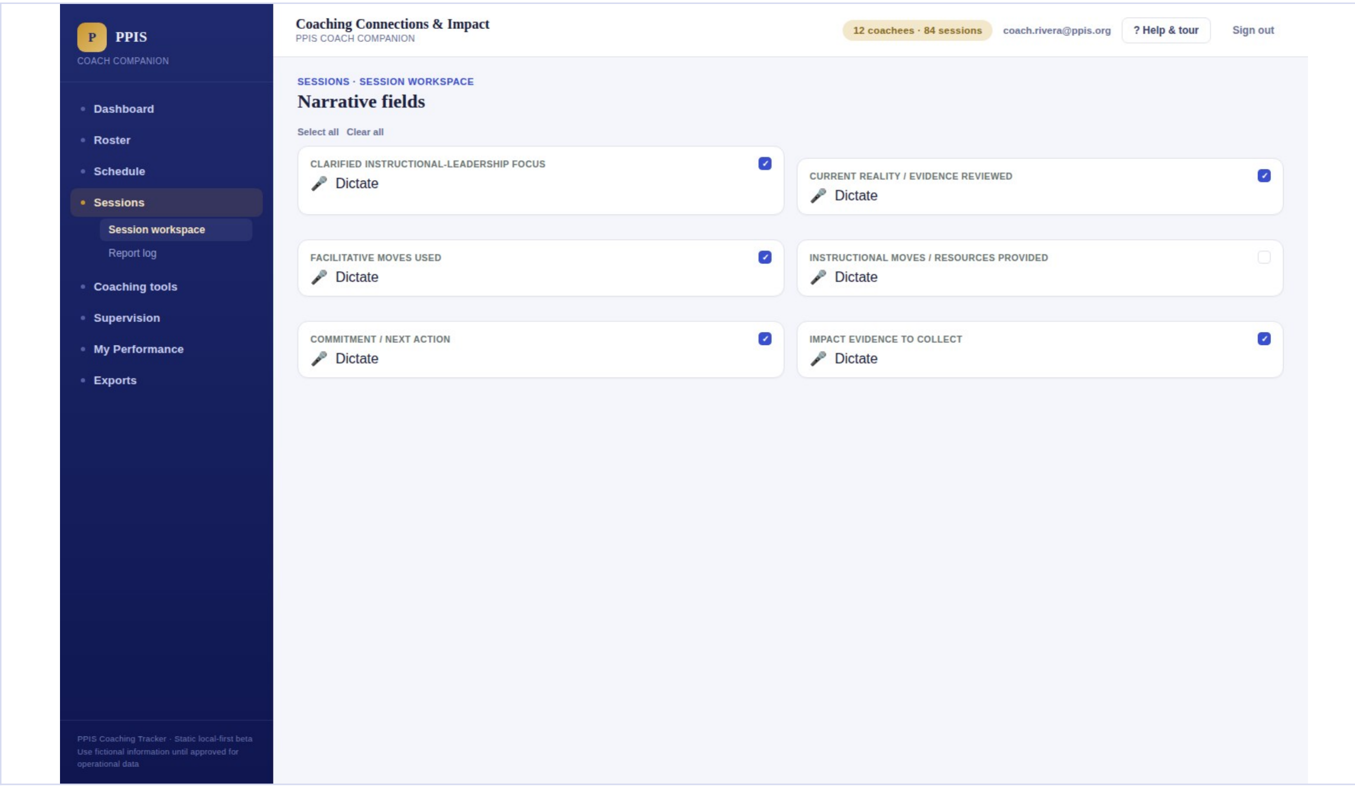
WHY IT WAS INCLUDED

Coaching notes are most accurate immediately after a conversation, when a coach's hands are often not free to type at length. Voice capture — with a transcript the coach reviews before anything is saved — closes that gap without sacrificing accuracy.

HOW IT WORKS

1. Check "Consent/permission to record or transcribe has been confirmed" first — this is required before any recording tool will run, and the app only asks for microphone permission once per device.
2. Use Start audio / Stop audio for a raw recording, or Start live transcript / Stop transcript to see text appear as you speak.
3. Click Dictate full debrief to speak a whole-session recap; the app shows a transcript preview you review and approve before it fills the narrative fields below — it does not save the audio itself, only the reviewed text.
4. Click Stop & preview extraction to end dictation and review what will be extracted into the form before it's applied.
5. Recognition accuracy varies by browser, so always read the filled text before saving.

Narrative fields with inclusion checkboxes



WHAT IT DOES

A set of longer reflective fields — Clarified instructional-leadership focus, Current reality/evidence reviewed, Facilitative moves used, Instructional moves/resources provided, Commitment/next action, and Impact evidence to collect — each with its own Dictate button and its own inclusion checkbox.

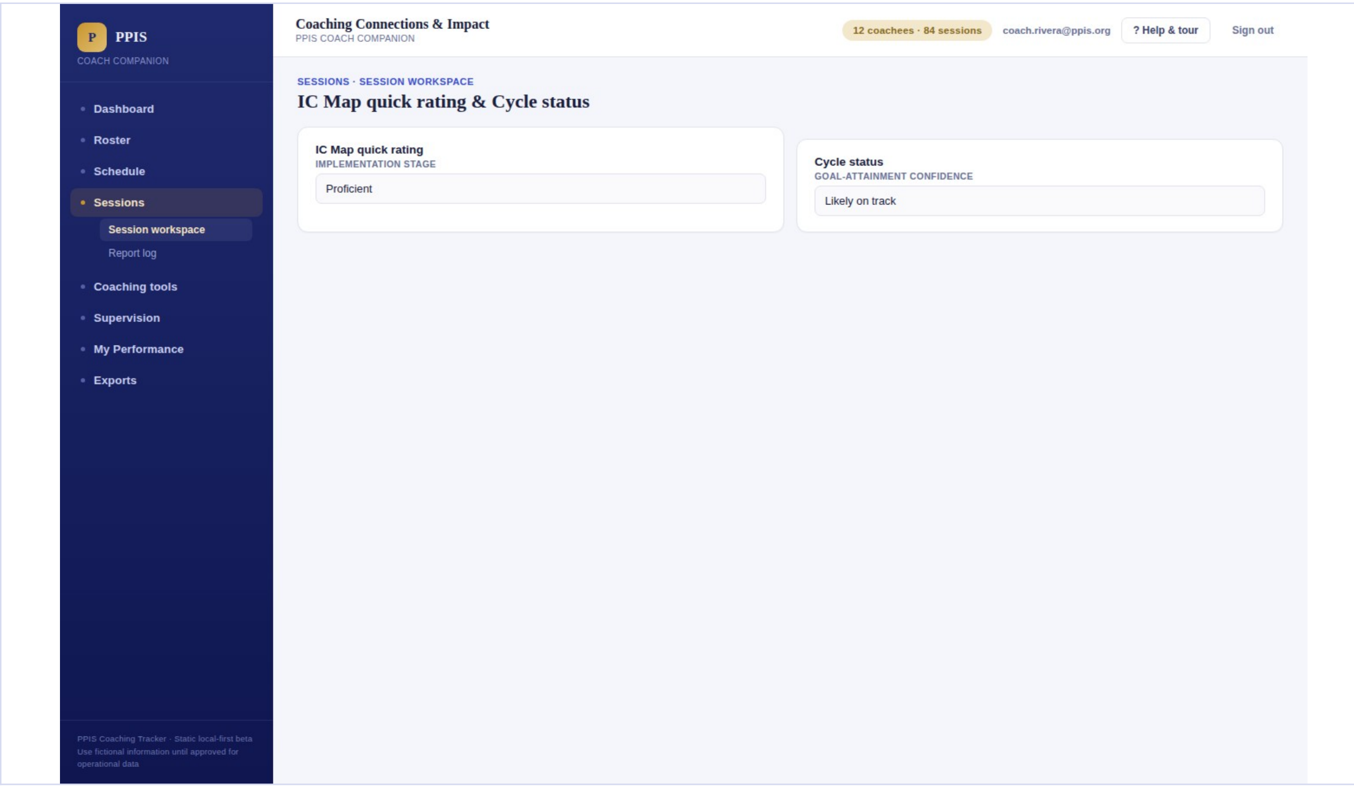
WHY IT WAS INCLUDED

This is the substantive coaching record: what was addressed, what evidence was used, what the coach did, and what happens next. The per-field checkbox exists because not every note should expose every field in a shared PDF — a coach can write something for their own memory and still exclude it from what gets printed or exported.

HOW IT WORKS

1. Write or dictate each field as needed; leave any that don't apply to this session blank.
2. Un-check the box beside a field to exclude it from the notes modal, printed notes, and PDF exports for this session, while still keeping it saved.
3. Use Select all / Clear all (where shown) to quickly include or exclude every field at once before printing or exporting.

IC Map quick rating & Cycle status



WHAT IT DOES

A quick-rating control tied to the Instructional Coaching Implementation Map, and a Cycle status block including a goal-attainment confidence rating, shown at the bottom of the session form.

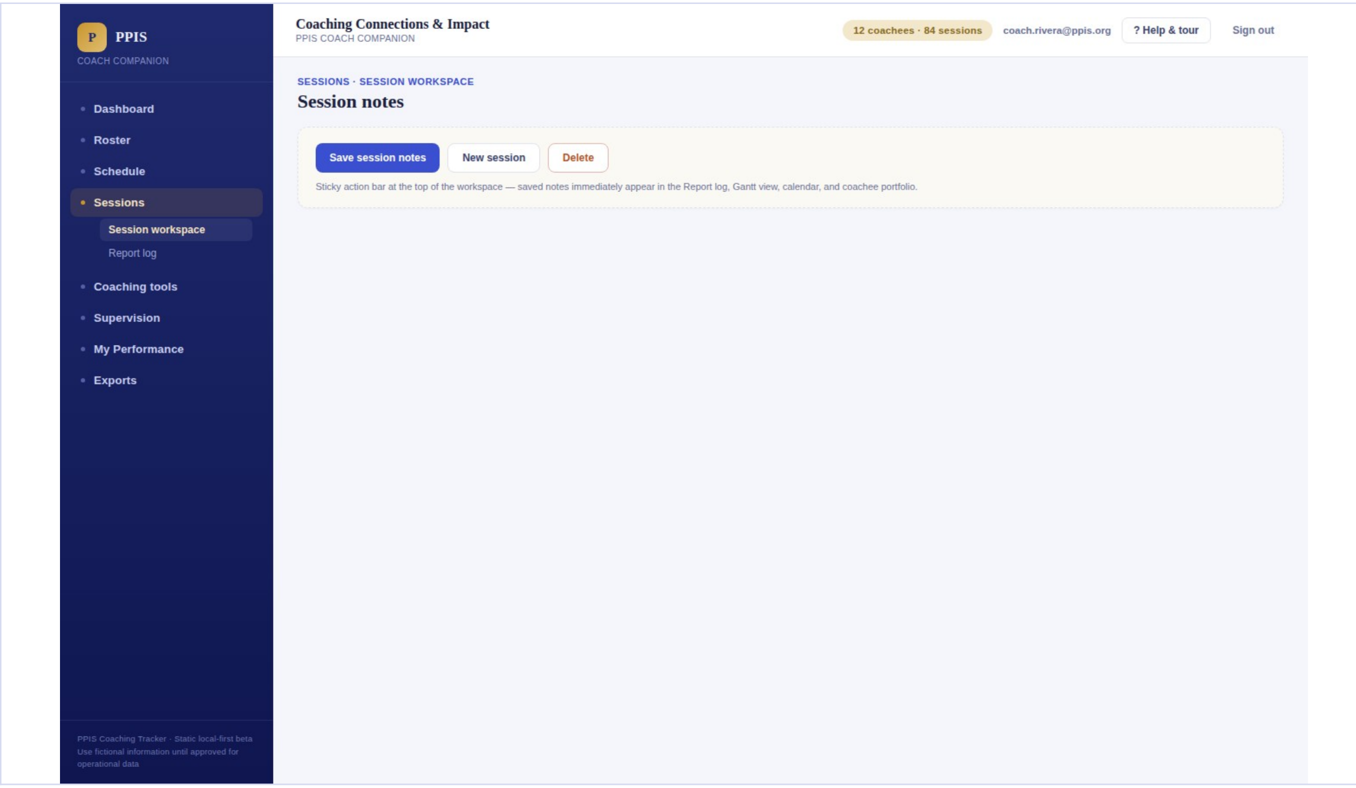
WHY IT WAS INCLUDED

Rating implementation stage and goal-attainment confidence at the moment a session is logged — rather than as a separate, easy-to-skip activity — is what keeps the Dashboard's Average IC Stage tile and the Short Cycle records (Exports tab) populated with real, current data instead of stale estimates.

HOW IT WORKS

1. Set the quick rating to reflect where the coachee/team appears to sit today; use the full IC Map (Coaching tools tab) when a more detailed, dimension-by-dimension rating is needed.
2. Record goal-attainment confidence honestly — this feeds the Short Cycle growth records on the Exports tab.

Save session notes / New session



WHAT IT DOES

The sticky action bar at the top of the workspace: Save session notes, New session, and Delete.

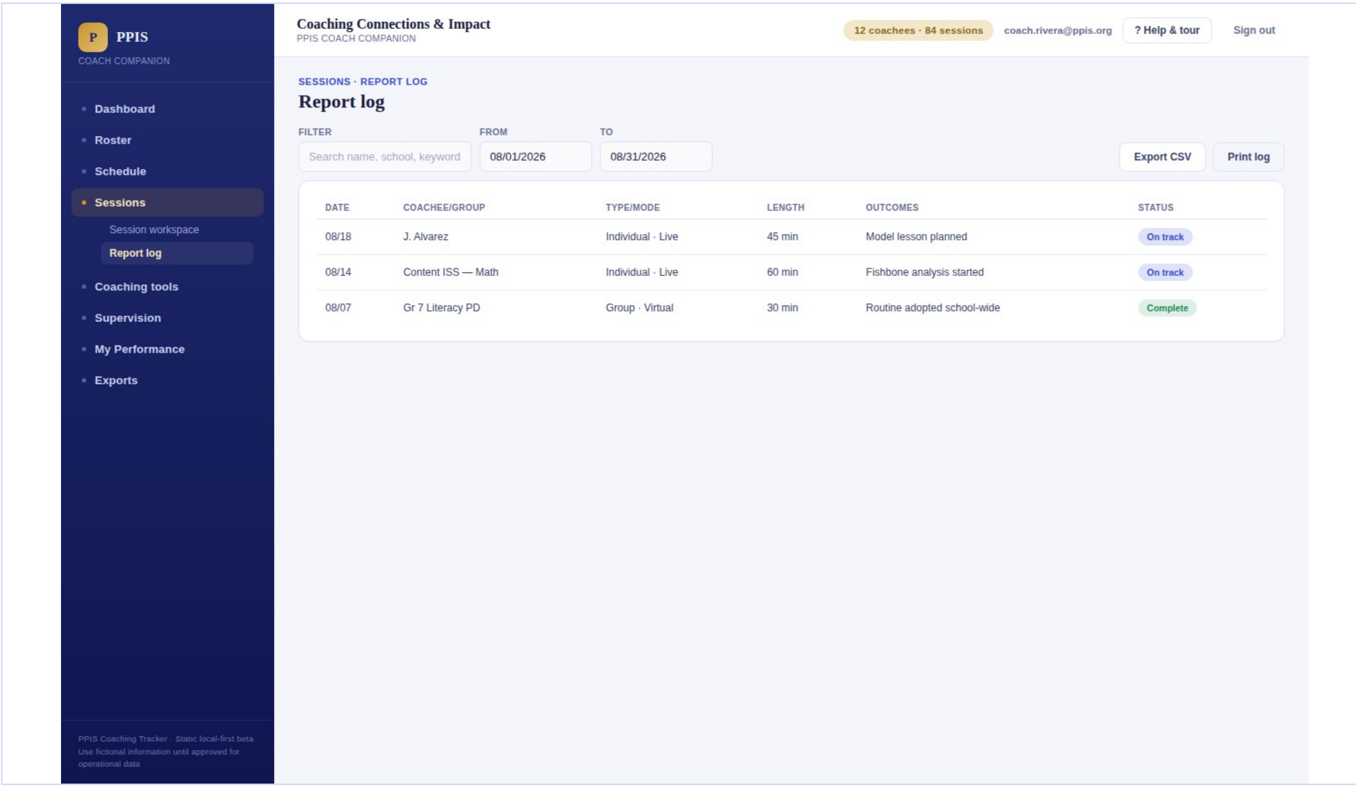
WHY IT WAS INCLUDED

Session notes are not saved automatically — an explicit save step avoids partially-typed or accidental entries silently becoming part of the permanent record.

HOW IT WORKS

1. Click Save session notes when the form is complete; saved notes immediately appear in the Report log, the Gantt view, the Dashboard calendar, and the coachee's PDF portfolio.
2. Click New session to clear the workspace and start documenting a different interaction.
3. Use Delete (inside an open session) to remove a note entirely — this cannot be undone.

Report log



WHAT IT DOES

A filterable, chronological table of every archived session — Date, Coachee/Group, Type/Mode, Length, Context, Outcomes, and Status — with per-row Note, Print, and Delete actions, a Filter box, a From/To date range, and Export CSV / Print log buttons.

WHY IT WAS INCLUDED

A supervisor or coach reviewing a whole term of activity should not have to open every individual session note. The Report log compresses each interaction into one scannable line while still linking back to the full note.

HOW IT WORKS

1. Use the Filter box (name, school, or keyword) and the From/To date pickers to narrow the list.
2. Click Note on any row to reopen the full session in the workspace, Print for a single-row printout, or Delete to remove that record.
3. Click Export CSV to download the filtered list as a spreadsheet, or Print log for a printable version of the whole table — both commonly used to hand evidence to a supervisor.

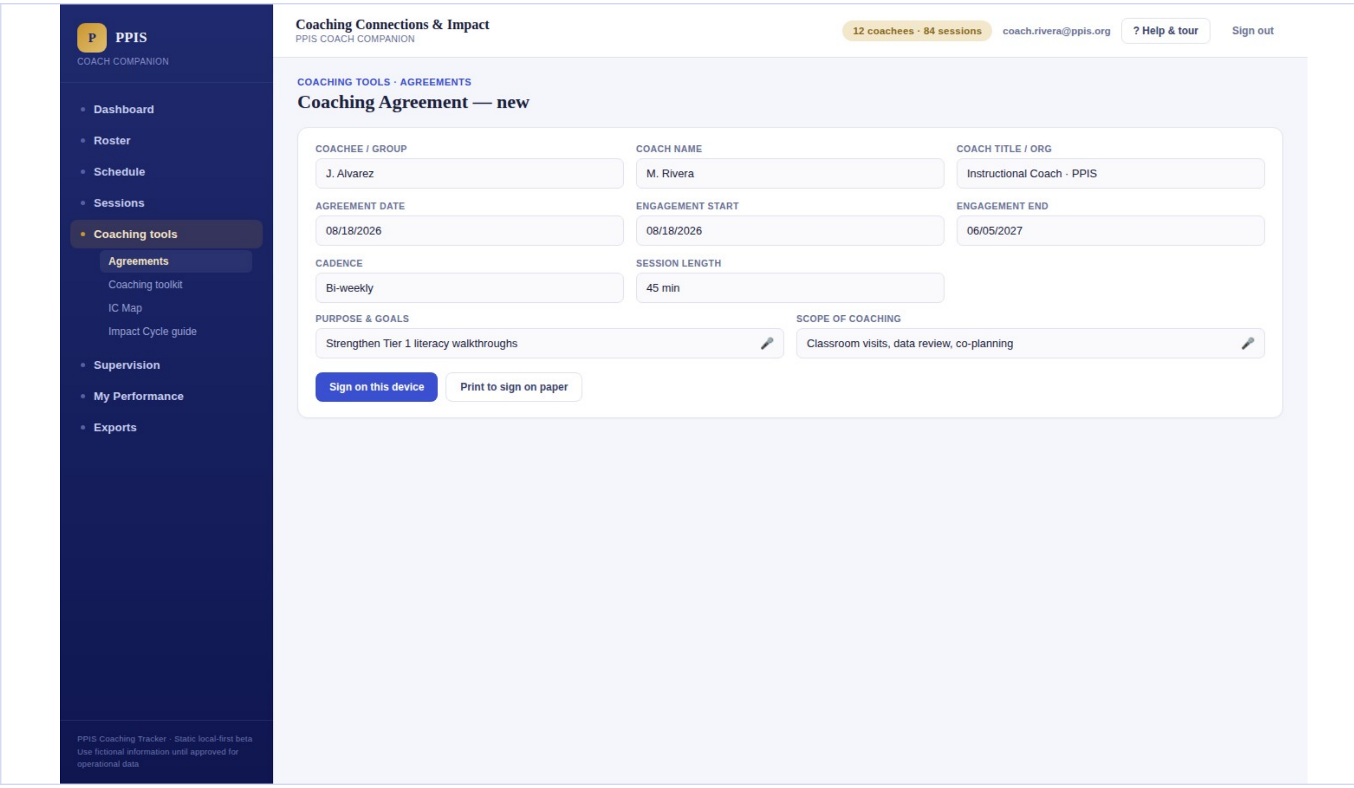
06 Coaching tools

Agreements, the Blended Coaching Toolkit, the IC Map rubric, and the Impact Cycle guide.

Coaching Agreement • Blended Coaching Toolkit • IC Map • Impact Cycle guide

SECTION 06 · COACHING TOOLS

Coaching Agreement



WHAT IT DOES

A form that generates a signable coaching agreement per coachee/group: Coachee/Group, Coach Name, Coach Title/Org, Agreement Date, Engagement Start/End, Cadence, typical Session Length, Purpose & Goals, and Scope of Coaching.

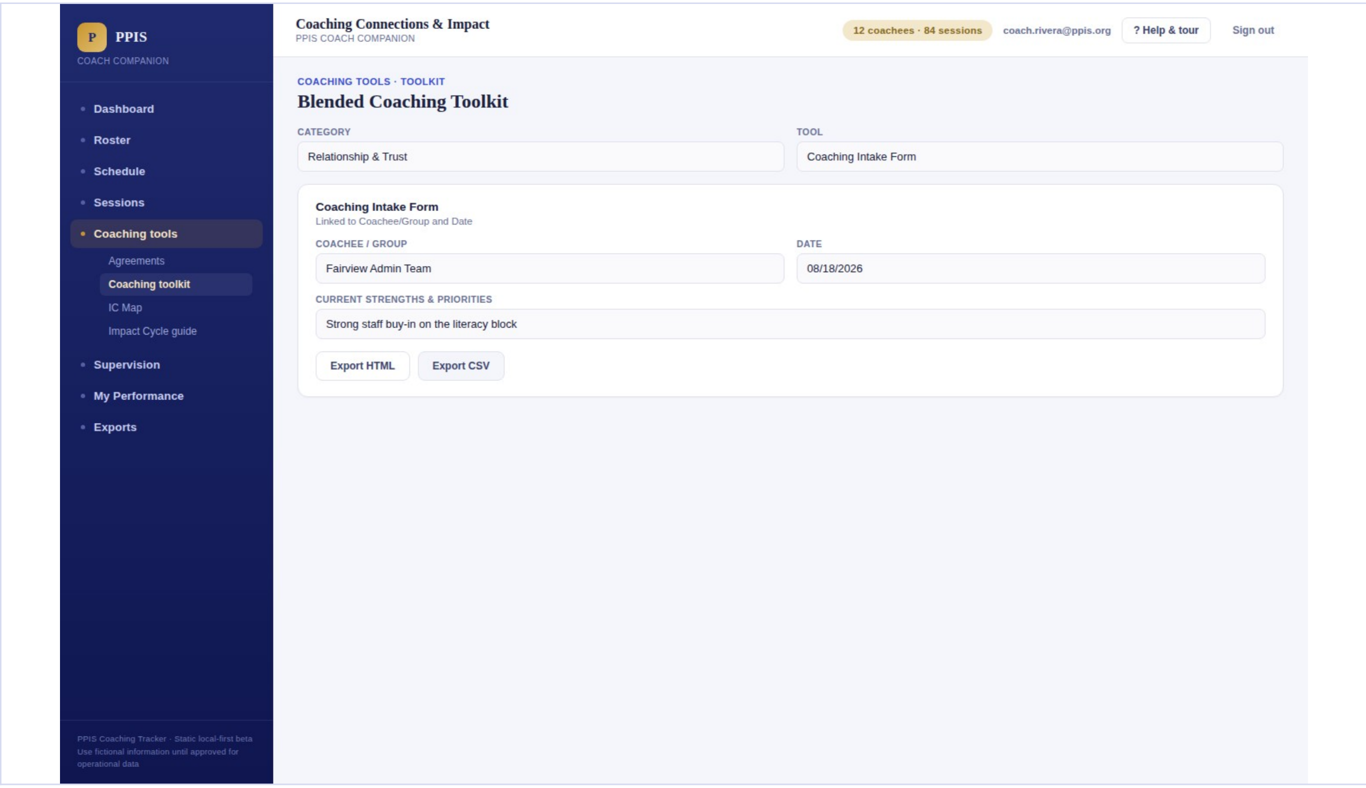
WHY IT WAS INCLUDED

A written, mutually understood agreement up front reduces ambiguity about how often coaching happens, what it covers, and what both parties are committing to — and gives both the coach and the coachee something to point back to if expectations drift over the year.

HOW IT WORKS

1. Select the Coachee/Group — several fields auto-fill from their Roster record.
2. Fill in Purpose & Goals and Scope of Coaching (each has a Dictate button for speaking the text instead of typing it).
3. The agreement can be signed by both parties directly on this device, or printed to sign on paper. Signed agreements are stored locally and are downloadable.

Blended Coaching Toolkit



WHAT IT DOES

A Category and Tool dropdown pair (for example, Relationship & Trust → Coaching Intake Form) that reveals the matching field set automatically, plus two visual tools — a Fishbone diagram and a fillable Driver diagram (Goal, Primary/Secondary Drivers, Actions, and Metrics, with as many stacked boxes as needed and per-item color coding).

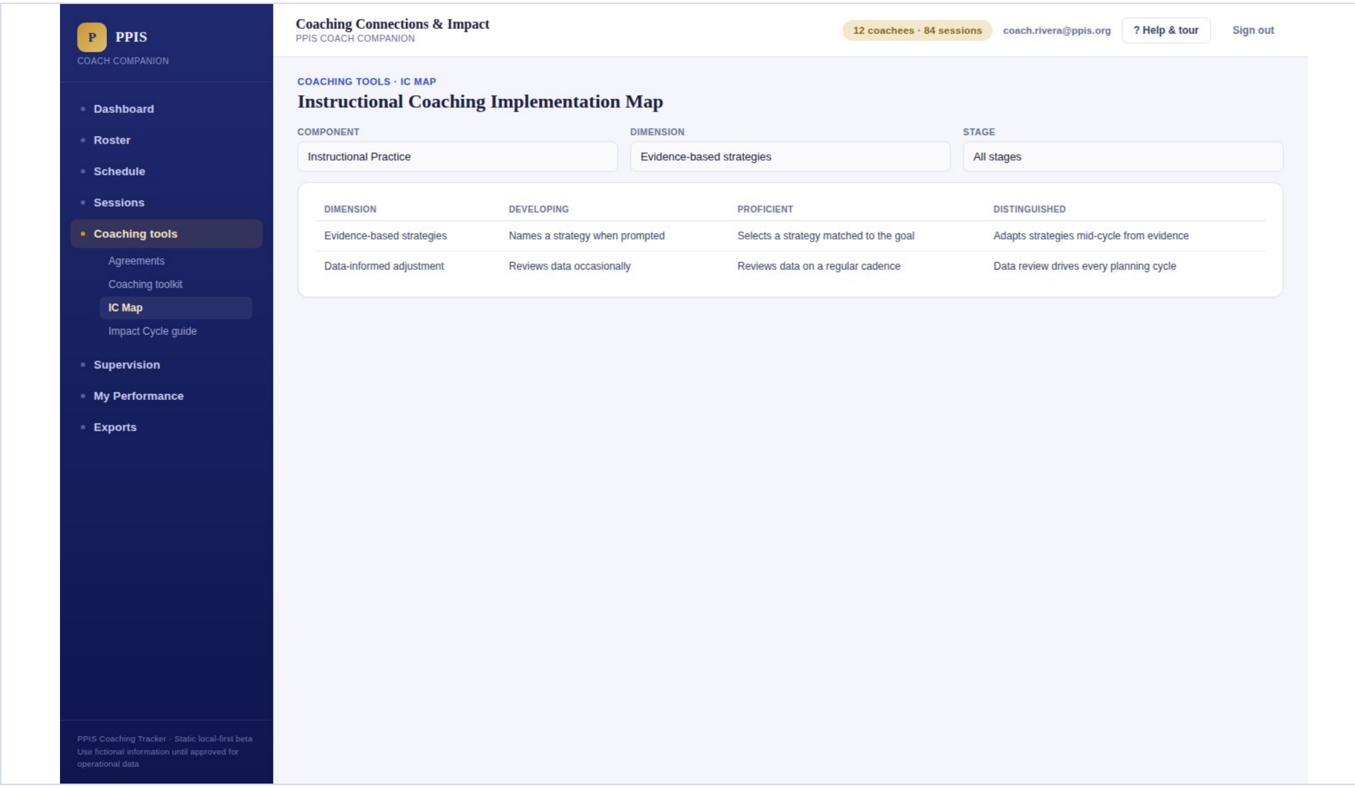
WHY IT WAS INCLUDED

Coaches already use protocols like intake forms, fishbone root-cause analysis, and driver diagrams outside of any software. Building them into the app — linked to a specific coachee and date — means the artifact from a protocol becomes part of that person's permanent coaching record instead of a disconnected worksheet.

HOW IT WORKS

1. Choose a Category, then a Tool; the description and relevant fields for that tool appear immediately below.
2. Link the entry to a Coachee/Group and Date, complete the fields, and save.
3. For Fishbone diagram and Driver diagram, build the visual directly on screen — add as many boxes/stacks as the analysis needs and assign colors per item for readability.
4. Export any toolkit entry as HTML or CSV, or print the diagrams directly.

IC Map (Instructional Coaching Implementation Map)



WHAT IT DOES

The official rubric behind the app: 4 components, 13 dimensions, and 36 sub-dimensions, each with Distinguished / Proficient / Developing descriptors, browsed via Component and Dimension dropdowns and a Stage filter.

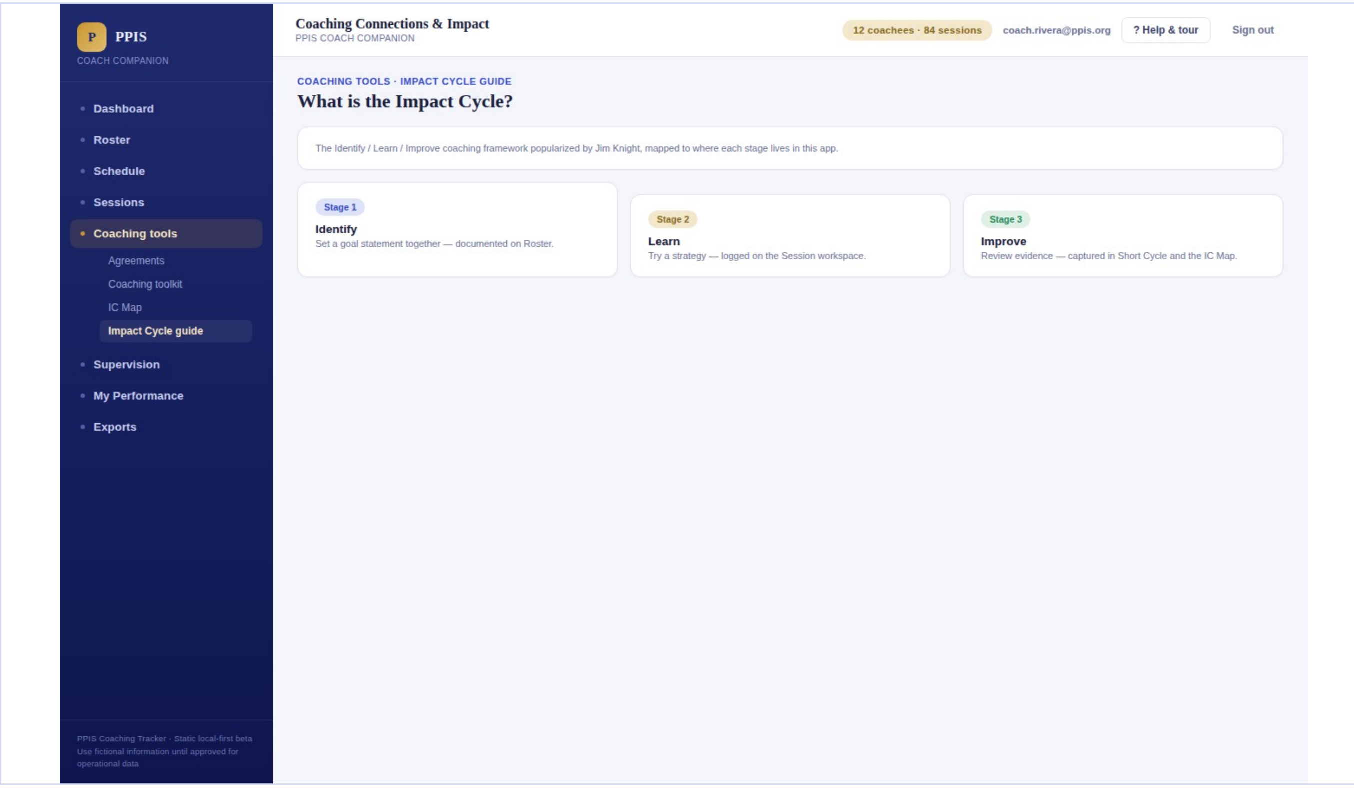
WHY IT WAS INCLUDED

Rating growth without a shared rubric is just an opinion. The IC Map gives every coach in the program the same vocabulary and the same bar for what "proficient" versus "developing" actually looks like, which is what makes the Dashboard's Average IC Stage tile and the quick ratings on the Session workspace comparable across coaches.

HOW IT WORKS

1. Use the COMPONENT and DIMENSION dropdowns to drill into a specific area of the framework.
2. Set STAGE to All stages to see Distinguished, Proficient, and Developing side by side, or pick one stage to focus the table on just that column.
3. Use this full table for a formal, dimension-by-dimension rating; use the IC Map quick rating on the Session workspace for a fast, single-number check-in during a session.

Impact Cycle guide



WHAT IT DOES

A built-in reference article explaining the Impact Cycle — the Identify / Learn / Improve coaching framework popularized by Jim Knight — and how each stage maps onto specific screens in this app (goal statements in Roster, strategies in the Session workspace, evidence in Short Cycle and the IC Map).

WHY IT WAS INCLUDED

The entire app is organized around this framework, so a coach who doesn't already know it well needs somewhere to learn it without leaving the tool or hunting for an outside PDF. Explicitly mapping each stage to the screen that supports it turns a training document into a navigation aid.

HOW IT WORKS

1. Read top to bottom — Stage 1: Identify, Stage 2: Learn, and Stage 3: Improve are laid out in order, each explaining what the coach and coachee do together at that stage.
2. Use the stage-to-screen mapping at the top as a quick pointer to where in the app that stage of work actually gets documented.

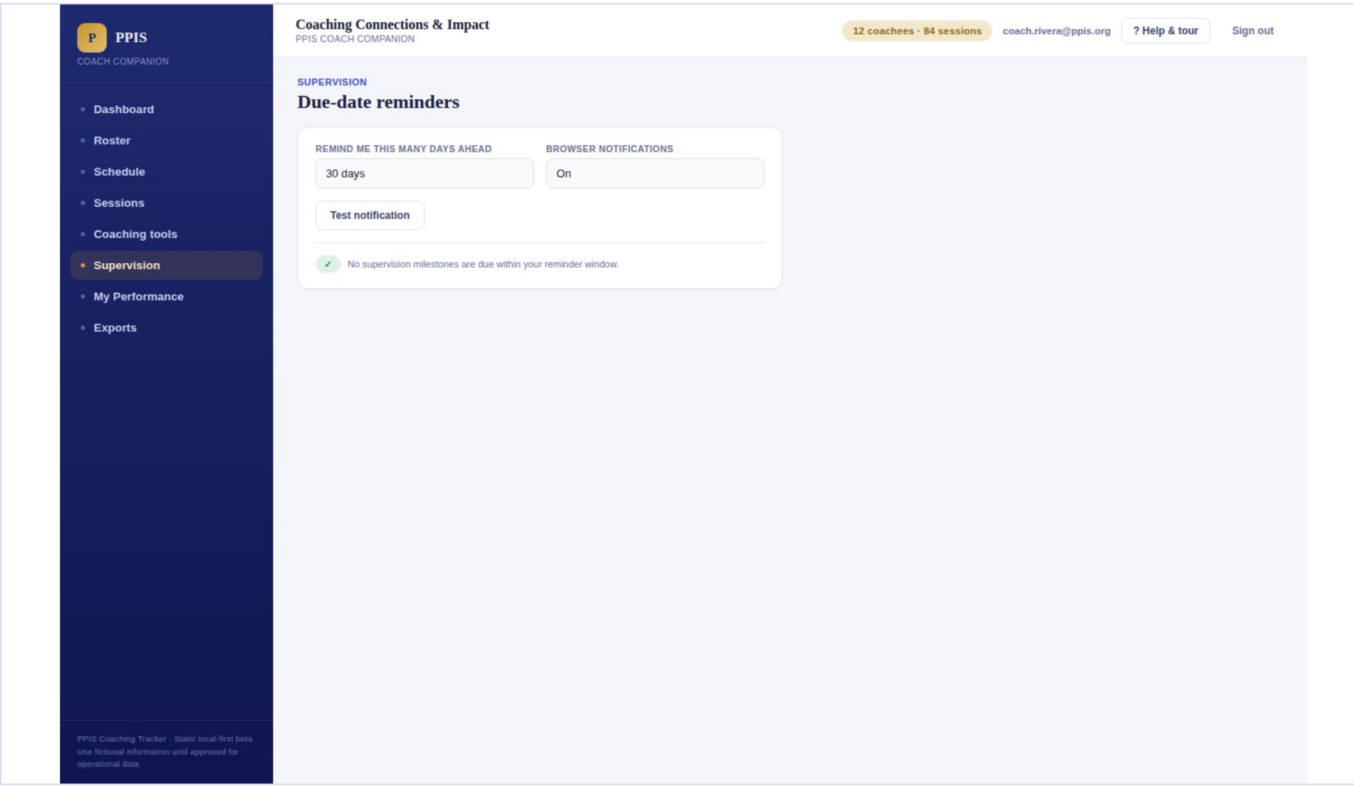
07 Supervision

Formal supervisory records and reminders for each Content ISS's two yearly milestones.

Due-date reminders • Content ISS supervision record

SECTION 07 • SUPERVISION

Due-date reminders



WHAT IT DOES

A reminder configuration panel — Remind me this many days ahead (default 30 days), Browser notifications (on/off), and a Test notification button — plus a live status line showing whether anything is currently due.

WHY IT WAS INCLUDED

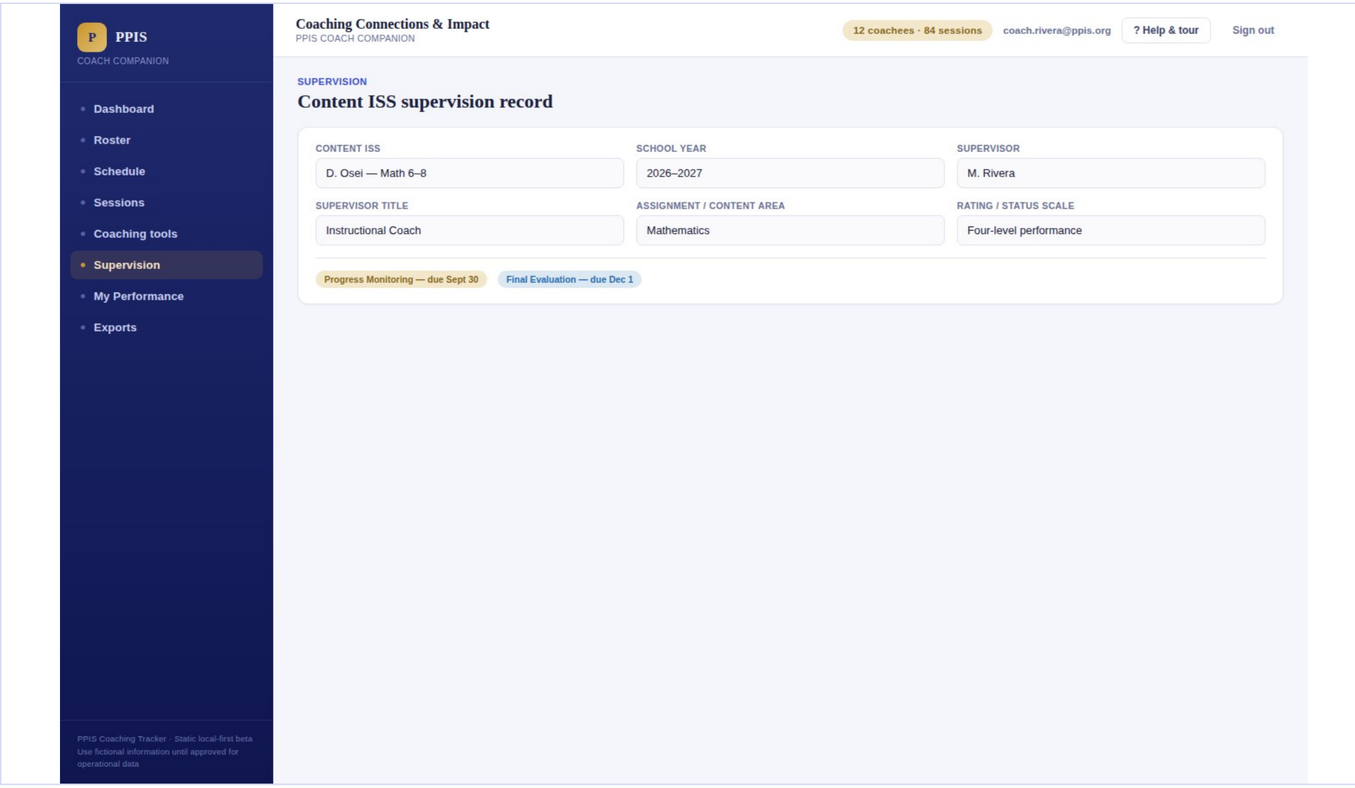
The two supervision milestones (Progress Monitoring, due September 30, and Final Evaluation, due December 1) are compliance deadlines, not casual to-dos. A configurable, testable reminder reduces the chance one gets missed simply because the coach forgot to check the app that week.

HOW IT WORKS

1. Set REMIND ME THIS MANY DAYS AHEAD to the lead time that works best (e.g., 30 days before a deadline).
2. Turn on BROWSER NOTIFICATIONS if you want an alert outside the app itself, and use Test notification to confirm it's working before relying on it.
3. The status line below updates automatically — "No supervision milestones are due within your reminder window" means nothing needs action right now.

SECTION 07 · SUPERVISION

Content ISS supervision record



WHAT IT DOES

One record per Content ISS per school year: Content ISS, School Year, Supervisor, Supervisor Title, Assignment/Content Area, and a Rating/Status Scale (default: Four-level performance, with a Configure rating scale option). Progress Monitoring (Sept 30) and Final Evaluation (Dec 1) are tracked with color-coded due-date chips.

WHY IT WAS INCLUDED

Formal supervision of Content ISS staff is a distinct, higher-stakes obligation than routine coaching notes, so it gets its own record type, its own deadlines, and its own rating scale rather than being folded into general session notes.

HOW IT WORKS

1. Select the Content ISS and School Year; Supervisor and Supervisor Title default to the signed-in coach's info but can be adjusted.
2. Use Configure rating scale to change the rating/status options if the program uses a scale other than the four-level default.
3. Narratives can be dictated directly, or drafted automatically from that ISS's already-logged coaching sessions rather than written from scratch.
4. Multiple records can be bulk-edited at once when the same update (e.g., a supervisor change) applies across several Content ISS staff.
5. Export any record as PDF, CSV, or JSON when it needs to leave the app — for a personnel file, a district office, or a backup.

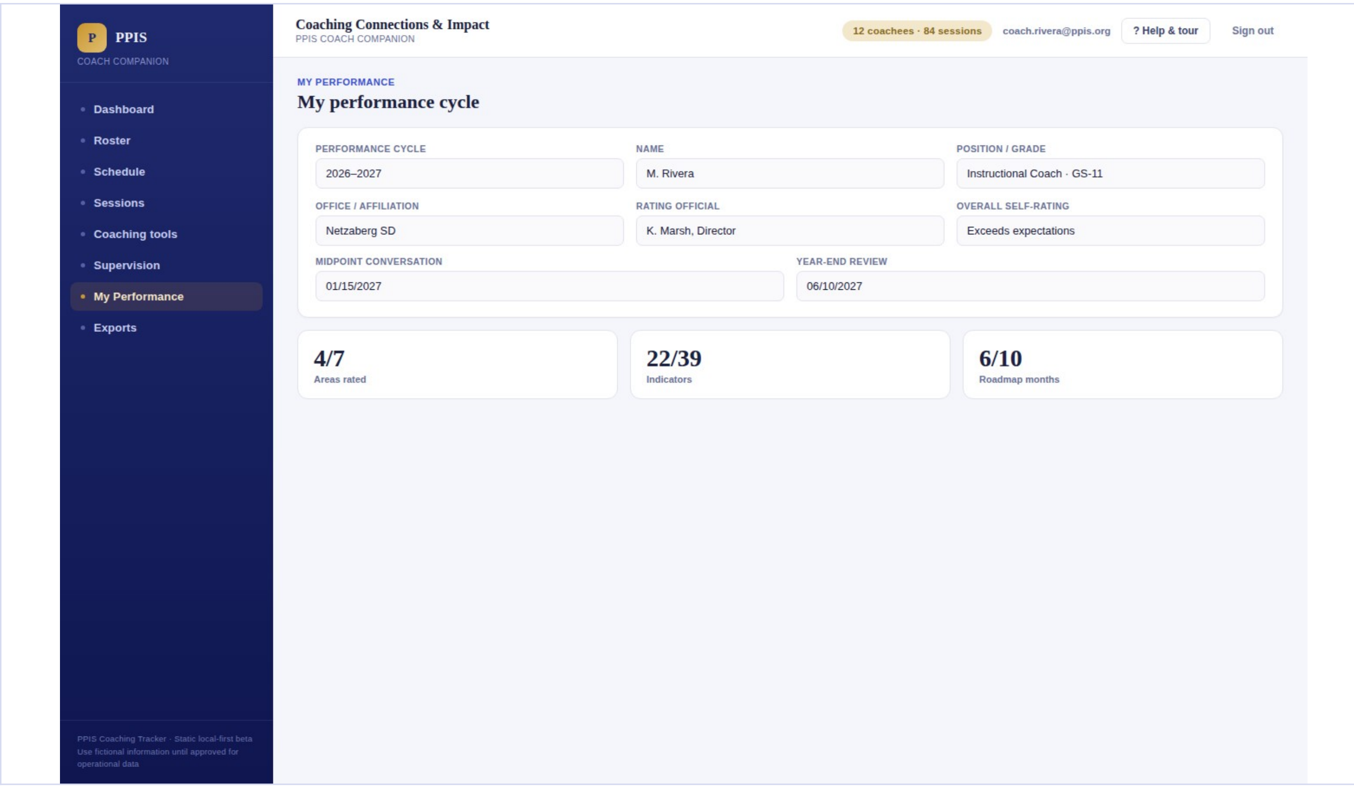
08 My Performance

The coach's own self-evaluation, mirrored against the same structured framework.

My performance cycle • Story of impact

SECTION 08 · MY PERFORMANCE

My performance cycle



WHAT IT DOES

A self-evaluation record tracked against the seven success areas of the Supervisory PPIS Leadership Playbook: Performance Cycle, Name, Position/Grade, Office/Affiliation, Rating Official, Midpoint Conversation date, Year-End Review date, and an Overall Self-Rating, with progress chips (Areas rated, Indicators, Roadmap) and a Top priorities for this cycle field.

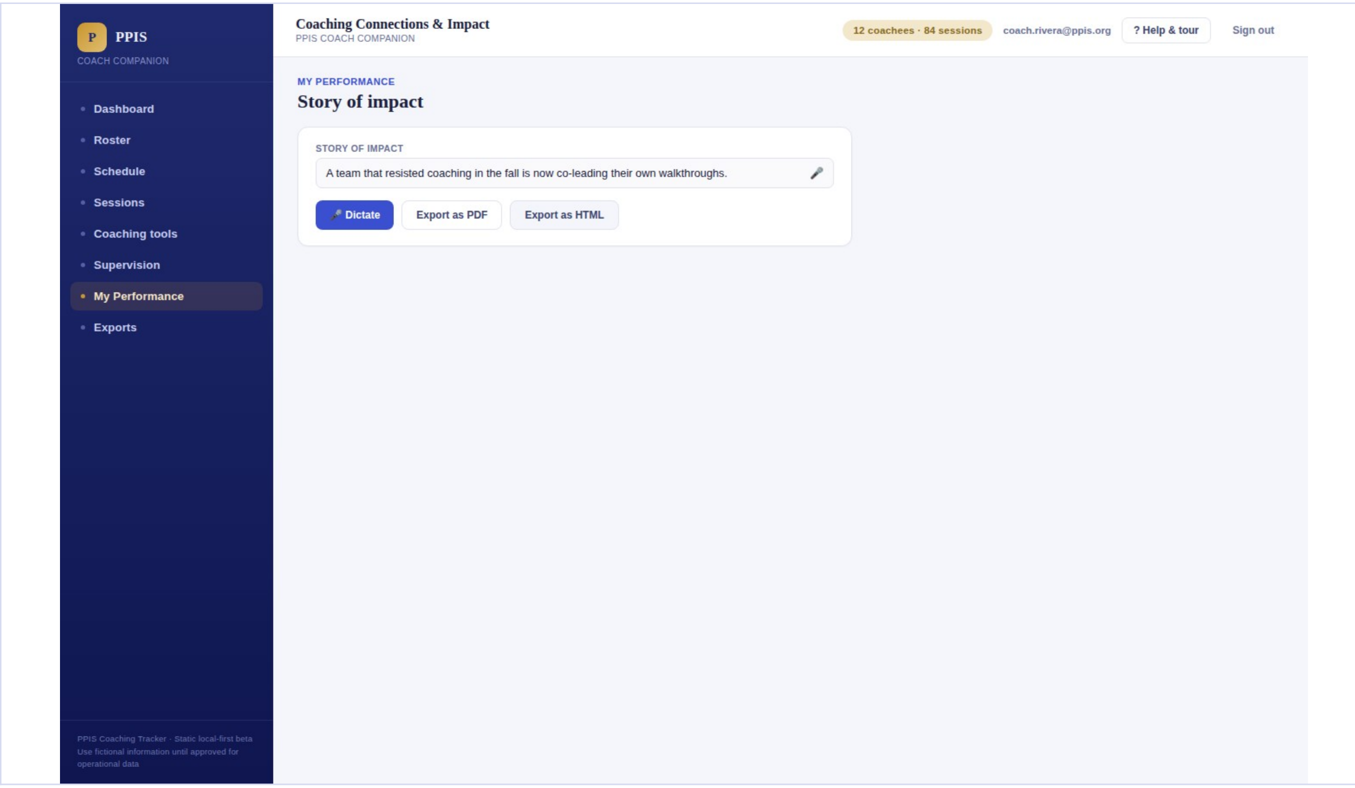
WHY IT WAS INCLUDED

A coaching program asks coachees to reflect honestly on their own growth; this tab exists so the coach models the same practice for themselves against the same kind of structured framework, rather than being the only person in the relationship who isn't rated against clear indicators.

HOW IT WORKS

1. Set the Performance Cycle (school year) and fill in your identifying details and Rating Official.
2. Enter Midpoint Conversation and Year-End Review dates as they're scheduled with your rating official.
3. Use Top priorities for this cycle (Dictate available) to name what would have the greatest positive impact this year — this frames how the rest of the evaluation is filled in.
4. Work through the seven success areas' success-indicator checklists and self-rating scales, using the reflective question banks and the 10-month roadmap as prompts; the progress chips (Areas rated X/7, Indicators X/39, Roadmap X/10 months) track completion.

Story of impact



WHAT IT DOES

A dictation-supported narrative field for describing the coach's impact over the cycle, with a transcript preview the coach reviews before it fills the field.

WHY IT WAS INCLUDED

A single powerful example of impact is often more persuasive in an evaluation conversation than a checklist of ratings. Making this easy to capture by speaking it — right after it happens, not months later at review time — means the story doesn't get lost or flattened into vague language.

HOW IT WORKS

1. Use the Dictate control to speak the story of impact; review the transcript before it's applied to the field, then edit as needed.
2. Export the full evaluation as PDF or HTML when it's time to share it with the rating official.

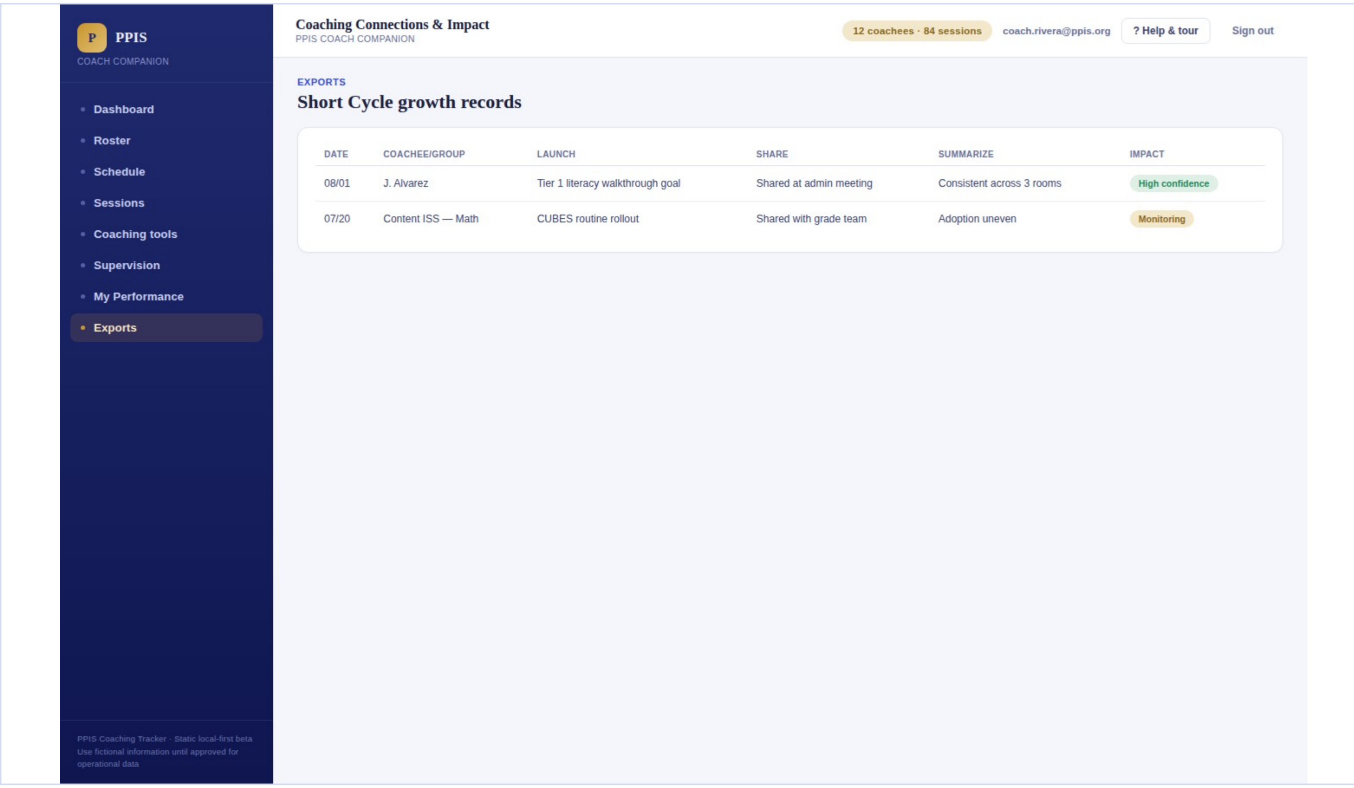
09 Exports

Short Cycle growth records and every download in the app, organized in one hub.

Short Cycle growth records • Export hub

SECTION 09 • EXPORTS

Short Cycle growth records



WHAT IT DOES

A table of improvement-evidence entries, each with a Date, Coachee/Group, a Launch description, and Share / Summarize / Impact columns, built around a three-phase model — Launch, Share, and Summarize.

WHY IT WAS INCLUDED

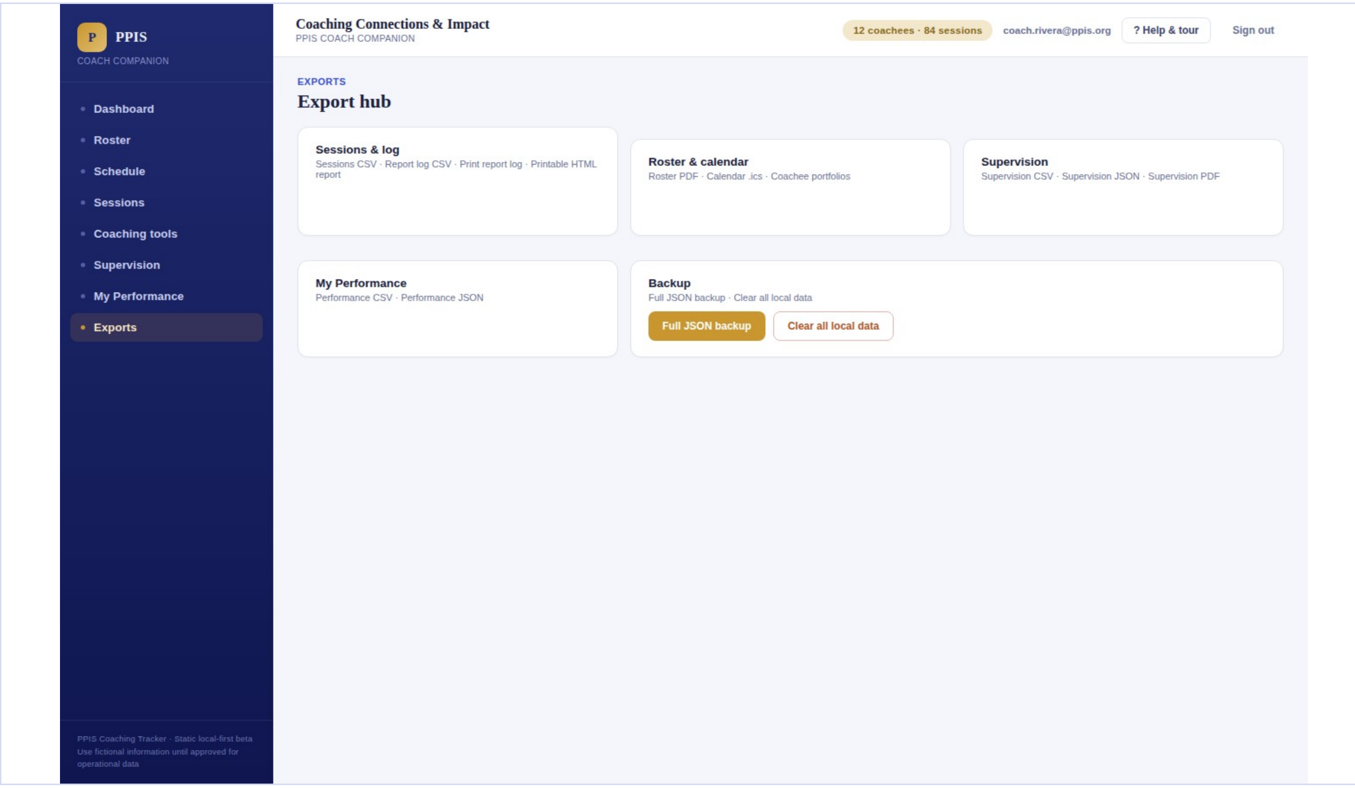
Short Cycles are how the app tracks whether coaching is actually moving a leader toward their stated goal, not just whether sessions are happening. Reviewing them regularly is what turns "we met" into "we made measurable progress."

HOW IT WORKS

1. A new Short Cycle typically starts from a goal set during a session (see IC Map quick rating & Cycle status on the Session workspace).
2. Use the Share and Summarize columns to record how progress was communicated and what was concluded once evidence came in, and Impact to capture the resulting confidence in goal attainment.

SECTION 09 · EXPORTS

Export hub



WHAT IT DOES

Every export in the app, grouped into five categories: Sessions & log (Sessions CSV, Report log CSV, Print report log, Printable HTML report), Roster & calendar (Roster PDF, Calendar .ics, Coachee portfolios), Supervision (Supervision CSV, Supervision JSON, Supervision PDF), My Performance (Performance CSV, Performance JSON), and Backup (Full JSON backup, Clear all local data).

WHY IT WAS INCLUDED

The app stores data locally in the browser plus the coach's cloud account (a "local-first" design), so regular export is how a coach avoids losing work — and different audiences need different formats: CSV for spreadsheets and district reporting, PDF for printing or sharing, JSON for a complete machine-readable backup or restore.

HOW IT WORKS

1. Use the Sessions & log group to hand a supervisor a clean record of coaching activity, or produce a shareable HTML report.
2. Use Roster & calendar to export the caseload, subscribe to or export the visit calendar, or jump into per-coachee portfolios.
3. Use the Supervision and My Performance groups for the exports specific to those two records.
4. Click Full JSON backup regularly — this is the complete, restorable copy of everything in the app (import it back on the Roster tab's Import JSON backup button).
5. Clear all local data permanently erases everything stored on this device — only use it after confirming a recent backup exists; this action cannot be undone.

10 Cross-Cutting Features

Behaviors that work the same way everywhere: help, dictation, navigation, and storage.

SECTION 10 • CROSS-CUTTING FEATURES

Interactive Help & Tour

WHAT IT DOES

A "? Help & tour" button in the header, positioned just before Sign out, that opens a 14-step guided walkthrough covering every tab in the app. The guide has a topic sidebar (all 14 steps listed), Back/Next navigation, and a "Take me there" button on every step that jumps straight to the matching live screen.

WHY IT WAS INCLUDED

New coaches joining the program need to learn 8 primary sections and several sub-screens without a separate training session or a document that inevitably goes out of date as the app changes. Building the walkthrough into the app itself — and letting it jump directly to the real screen instead of just describing it — keeps onboarding self-service and current.

HOW IT WORKS

1. Click "? Help & tour" in the header to open the guide from anywhere in the app.
2. Click through topics in the left-hand sidebar, or use Back / Next to move sequentially through all 14 steps.
3. Click Take me there on any step to close the guide and jump straight to that tab.
4. The final step, Tips & housekeeping, covers dictation consent behavior, installing the app to a phone's home screen, and the fact that Sign out prompts a backup save first so work is never lost.

SECTION 10 · CROSS-CUTTING FEATURES

Unified dictation across the app

WHAT IT DOES

One consent-gated microphone engine that powers every Dictate button in the app — in the Session workspace, Agreements, Coaching toolkit, Supervision, and My Performance (21 separate dictate buttons in My Performance alone).

WHY IT WAS INCLUDED

Earlier in development, dictation was built separately in several places with its own consent prompt each time. Unifying it into a single engine (a deliberate streamlining pass across the app) means a coach grants microphone permission once per device and then dictation simply works everywhere a mic icon appears, with consistent behavior and one place to review a transcript before it's saved.

HOW IT WORKS

1. The first time any Dictate button is used, the browser will ask for microphone permission — approve it once.
2. Every Dictate button follows the same pattern: speak, review the transcript preview, then approve before it fills the field.
3. Recognition accuracy varies by browser; always proofread dictated text before saving, especially names, dates, and numbers.

Grouped navigation with contextual sub-tabs

WHAT IT DOES

The primary navigation bar shows 8 groups — Dashboard, Roster, Schedule, Sessions, Coaching tools, Supervision, My Performance, Exports. A second row of sub-tabs appears only underneath a group that actually contains more than one screen (Sessions and Coaching tools); groups with a single screen show no sub-row at all.

WHY IT WAS INCLUDED

The app originally had 12 flat top-level tabs. A dedicated streamlining pass consolidated related screens into 8 groups specifically to reduce visual clutter, while keeping every original screen reachable — the sub-tabs only appear where there's actually a choice to make, so the navigation bar doesn't get taller than it needs to be on simpler tabs.

HOW IT WORKS

1. Click a primary tab to switch sections; if a sub-row of tabs appears beneath the header, that group has more than one screen — click a sub-tab to choose which one.
2. Tabs with no sub-row (Dashboard, Roster, Schedule, Supervision, My Performance) go straight to their single screen.

Local-first storage & data safety

WHAT IT DOES

A footer notice — "PPIS Coaching Tracker · Static local-first beta · Use fictional information until approved for operational data" — reflecting that the app currently stores data in the browser plus the coach's cloud account, encrypted at rest and visible only when signed in as that account.

WHY IT WAS INCLUDED

Coaching notes can contain sensitive information about school personnel and student outcomes; local-first, per-account storage keeps that data private to the coach rather than pooled in a shared database, while the beta label sets honest expectations while the tool is still being finalized for operational use.

HOW IT WORKS

1. Because data lives locally as well as in the cloud account, export a Full JSON backup (Exports tab) regularly, and especially before clearing a browser's data or switching devices.
2. Signing out prompts a backup save first, specifically to prevent losing unsaved local work.
3. Until the app is formally approved for operational data, treat entries as using fictional/placeholder information per the footer notice.

11 Quick-Reference: Every Export in the App

Every export/download control in the app, where to find it, and its file format.

SECTION 11 · QUICK-REFERENCE

Every Export in the App

The table below lists every export/download control in the application, where it lives, and the format it produces — a fast lookup for "where do I get X as a file?" without re-reading the full Exports chapter.

Export	Where to find it	Format
Sessions CSV	Sessions → Report log / Exports hub	CSV spreadsheet
Report log CSV	Sessions → Report log / Exports hub	CSV spreadsheet
Print report log	Sessions → Report log / Exports hub	Print / PDF
Printable HTML report	Exports hub	HTML
Roster PDF	Roster / Exports hub	PDF
Coachee portfolio PDF	Roster (per row) / Exports hub	PDF
Calendar .ics (export)	Dashboard calendar / Exports hub	iCalendar file
Calendar subscription	Dashboard calendar	Live feed URL (Outlook/Teams)
Supervision CSV / JSON / PDF	Supervision / Exports hub	CSV, JSON, or PDF
Performance CSV / JSON	My Performance / Exports hub	CSV or JSON
Performance PDF / HTML	My Performance	PDF or HTML
Toolkit entry export	Coaching tools → Coaching toolkit	HTML or CSV
Full JSON backup	Exports hub	JSON (full app backup)

DOCUMENT CONTROL

This manual reflects the application as observed during a full walkthrough of every navigation tab, sub-tab, and the built-in 14-step Interactive Help guide. Because the app is in active development, re-verify screen layouts periodically and update this manual (and its screenshots) alongside any significant navigation or workflow changes.