



Professional Tools

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Introduction

Educators will find many useful features in the Professional Tools section of Choices Planner. These tools enable you to generate reports with statistics showing how your students are using the product. With the Professional Tools, you can customize certain features and manage accounts. You will also find many resources and popular lesson plans to help you get the most out of Choices Planner.

The Professional Tools section is for educators and site administrators only. To access this section, you first need to create a professional account using the Professional Account Access Key (found in your Welcome Letter). To create a professional account, go to the Educator sign-in section, then click on Create a new professional account.

Once you are logged in, select the product you wish to use and then click the Professional Tools link in the top right corner of any page. For more details, see the [Access](#) section of this Professional Manual.

The Professional Tools area is divided into three main sections:

- Portfolios and Reports
- Resources
- Site Administration

Note that users with both Choices Explorer and Choices Planner will have one combined Professional Tools section.

Portfolios and Reports

[Reviewer](#) / [Reporter](#) / [Tracker](#)

Reviewer

The Reviewer tools are for viewing the contents of student portfolios. There are various methods available to find a portfolio. You will be viewing portfolios in the same tabbed format that students use.

As you are viewing a student's portfolio, you can use links to add comments or send reminders (with the top link). You can also track reviewed portfolios using the Portfolio has been reviewed button (in the left margin).

The Delete or Release Portfolios link on the Reviewer page allows you to delete a duplicate portfolio. You can also release a portfolio, which is recommended when students graduate or transfer to a new school. Once they are released, they will no longer be attached to your Choices Planner license.

Reporter

The Reporter tools enable you to create reports and generate statistics on how your students are using Choices Planner. You can quickly and accurately find out how often and for how long the product is used through these usage reports. You can also determine your group's most popular career and educational choices through outcome-based reports.

Usage reports are standard reports. You can create reports the showing number of sessions, the number of page views and the number of portfolios created in a month.

Outcome-based reports are customized reports based on criteria that you select. For example, you can create a report showing the top 40 saved careers, or a report based on students' Interest Profiler results. You could then make your report more specific by defining a time frame or age group.

Note the links on the top right corner of the reports. You can use these links to print, e-mail or create a PDF document of your report.

Tracker

You can use the Tracker tools to track all student portfolios and students' progress with the Guideways on Choices Planner.

The Portfolio Review Tracking feature helps you to keep track of the portfolios you've reviewed and assessed. It produces portfolio review status reports for classes and groups. Once you are in a report, you can click on a name to review the portfolio. You can change the status to "Not Yet Reviewed" for certain portfolios if you wish.

The Guideways Tracking feature for Choices Planner enables you to check your students' progress through the Guideways and leave comments. You start by choosing the class or group for which you want a report. You then choose the Guideway (1, 2, 3 or all). The report shows which steps have been completed for each portfolio.

Note the links on the top right corner of the reports. Use them to print, e-mail or create a PDF document of your report.

Resources

Resources for Choices Planner include the following:

- Lesson plans and activities
- Parent guides
- Product guides
- Product training information
- White papers

Customers who subscribe to both Choices Explorer and Choices Planner will find resources for both products displayed under the same Professional Tools.

Lesson plans and activities are organized by subject area. You can also browse them alphabetically. For each subject area, there is a set of lessons and related websites. A standard format is used for all lesson plans, and some lesson plans include worksheets that are linked from the activity page.

For example, to find lesson plans on career exploration, click on Careers Class, then Career Exploration. Here you will find some of our most popular lesson plans.

The Parent guides were created to encourage parental involvement in student career and college planning. There are guides for parents of middle school students and parents of high school students, with a variety of topics covered.

Product guides offer case studies. Each study presents a scenario of someone having difficulty with career and education planning, along with a solution showing how Choices Planner can help.

Product training explains the different types of training offered. You'll find links to more information on training possibilities.

White papers include reports and research related to career counseling.

Site Administration

You can use the tools in the Site Administration section to perform the following tasks:

- Customize course plans
- Change site passwords
- Send reminders to classes or to the entire site
- Manage professional accounts

The Customize feature applies to the High School Course Planning section. Each pathway has standard course listings. You can change the titles of these courses to match the titles your school uses. You can also add and delete courses.

The Change Password feature applies to your Site ID. You can change the password for your site, but you must make sure that everyone at your site knows the new password. The site password is required to access Choices Planner, and to create new portfolios and professional accounts.

The Send Reminder feature is for reminders to entire classes or sites. To do this, just choose a class or a school, create your reminder, and then post it.

The Manage Professional Accounts feature is for the professional accounts at your site. You will need a valid Professional Account Access Key (PAAK) to perform the following functions:

- Create another professional account
- Upgrade a portfolio to a professional account
- Convert a professional account to a portfolio
- View all professional accounts
- Change the PAAK

Frequently Asked Questions

1. [How do I access the Professional Tools?](#)
2. [I have users who have forgotten their portfolio name and password. Is there any way to look this information up?](#)
3. [I am working with my students' portfolios. How do I delete and release portfolios, sort a list of portfolios to view, create a group of portfolios, send reminders, and use the Portfolio Finder?](#)
4. [Are there any lesson plans to use with Choices Planner?](#)
5. [How do I find lesson plans for special education students?](#)
6. [How do I customize high school course plans for my school?](#)

1. **How do I access Professional Tools?**

The Professional Tools in Choices Planner are only for site administrators and educators. To access them, you need to create a professional account using the Professional Account Access Key (found in your Welcome Letter).

Once you are logged in to Choices Planner, click the Professional Tools link in the top right corner of any page. For more details, see the [Access](#) section of this Professional Manual.

2. **I have users who have forgotten their portfolio name and password. Is there any way to look this information up?**

Yes, site administrators and educators can look up portfolio names and passwords from Professional Tools. To find this information, start on the Professional Tools home page and click on the Reviewer tab.

From there, you can search for a user's portfolio using the different search options provided.

The user's portfolio name and password will be on the All About You page of their portfolio.

3. **I am working with my students' portfolios. How do I delete and release portfolios, sort a list of portfolios to view, create a group, send reminders, and use the Portfolio Finder?**

You can perform all these tasks in the Reviewer section of Professional Tools. For detailed answers to these questions, see the [FAQs](#) in the Portfolios section of this Professional Manual.

4. **Are there any lesson plans to use with Choices Planner?**

Yes, there are plenty! Check out the Resources section within Professional Tools by clicking on the Resource Library link. Once you're in the Resource Library, choose a subject and a topic in the Lesson Plans and Activities section.

5. **How do I find lesson plans for special education students?**

Go to Professional Tools and click on the Resource Library link. Select Special Education for a school subject, then choose a topic (Career Exploration, for example). You will have a choice of related lesson plans.

6. How do I customize high school course plans for my school?

- Go to Professional Tools and click on the Site Administration link.
- Click on the Customize Course Plans link.
- Select the pathway for which you want to customize the course listings or names.
- Select the grade you want to customize and select the Edit link next to that course. To add an additional course, click on the Add Course link.
- Type in the title of the customized course, then click Save.

You can also create a link to another location on the Web -- your school website's course descriptions, perhaps. Follow the steps above to get to the "add/edit course" screen of the course. In the "Course Title" box you can create a name for the link just as above. Below that box, enter the website address you are going to link to with a hyperlink.

When you have finished customizing your courses for a pathway, click on the Back to High School Courses link at the bottom of the page. When you have finished customizing all desired pathways, click on the Back to Site Administration link on the bottom of the screen.

The ability to change the subject area name (like Math or Science) is not available. If you do not wish to edit the course, you may also delete the course title by selecting the Delete link.

Choices Professional Manual

PLANNER

The screenshot shows a web browser window displaying the 'Choices Professional Planner' interface. The browser title is 'Professional Tools - Home - Microsoft Internet Explorer provided by Bridges Transitions'. The address bar shows the URL: <https://access.bridges.com/auth/Portal/pro/browse.do?productName=CP>. The page features a navigation menu with 'Home', 'Reviewer', 'Reporter', and 'Tracker' tabs. A search bar is located in the top right corner. The main content area is divided into several sections:

- Portfolios and Reports**: Contains three sub-sections:
 - Reviewer**: Review and access individual portfolios. Includes a link: [Sign In to View](#).
 - Reporter**: Create reports that show site usage, assessment results and planning outcomes. Includes a link: [Sign In to View](#).
 - Tracker**: Access real-time activity tracking reports. Includes a link: [Sign In to View](#).
- Resources**: Access lesson plans, activities, case studies and white papers that can help you make the most of Bridges products. Includes a link: [Resource Library](#).
- Site Administration**: Customize course plans, manage passwords, create Professional Accounts or upgrade individual portfolios to Professional Accounts. Includes a link: [Sign In to View](#).
- Professional Sign In**: Sign in or create an account for full access. Includes fields for 'Professional Account:' and 'Password:', and links for [Forgot your password?](#), [Create Professional Account](#), and [Upgrade Portfolio to Professional Account](#).

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