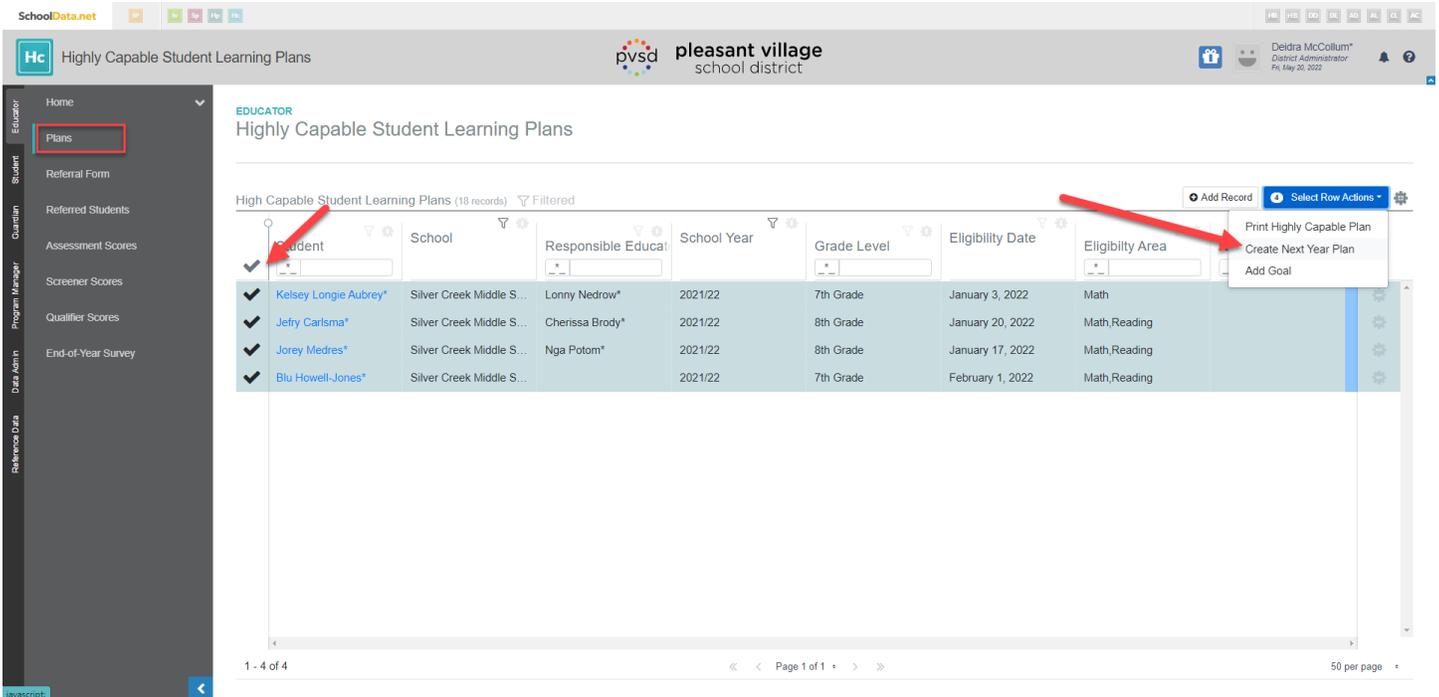# Copying Plans from Year to Year

Once a student has a Highly Capable Student Learning Plan, plans can be copied from year to year, which will allow for new educators to oversee the plan each year and for information about how the student is being served each year to be uniquely recorded. In addition, several of the tabs will retain historical data for reference, defaulting to show data associated with the current year including Strengths, Observations, Goals and Tasks.

This feature is designed to be used in the late summer or early fall, after your Student Information System rollover is complete.

How to Copy Plans

Plans can be copied on the Educator Role, via the Plans Data Table. First use the column headers to sort/filter and find the group of plans you would like to copy. You might look for all plans at a particular school, those in one grade level, or all those for students assigned to one educator. Note that this view shows current year plans by default, so if you are looking after rollover has taken place, you will likely have to update the year filter to see plans from the previous year.

Once you have located the plans you want to copy, use the check marks to the left of the plans to select them, or the checkmark at the top left to choose all plans. Then, using selected rows action at the top right corner, choose "Create Next Year Plan."

You will see a new form appear with the following selections, which will be applied to the new plan created for each selected student:

HiCap Educator Plans Create Next Year Plan   ✔ Save ✖

⌃ Next Year Plans
The selected values will be applied to the new plans created for each selected Student

Responsible Educator (optional)   Select

Supplemental Educators (optional)   Select   Service Models (optional)   Select

Notes (optional)

Responsible Educator: If this is left blank, and the student has an Advisor already assigned in the SIS, they will be added upon saving.
Supplemental Educators: Select any educators you would like added to all selected plans.
Service Models: Choose one or more Service Models that should be applied to all selected plans.
Notes: This text box can be used to add details you would like to note about all selected plans.

Several fields from the Details tab of each plan are either automatically generated, or carry forward:
Label: The current plan label will be copied forward, appended with (for next school year). For example, if you are using a 2021/22 plan with the label Amy's Math Plan, the newly created plan will be given the label Amy's Math Plan (for 2022/23)
Eligibility Date: This will remain the same.
Eligibility Areas: This will remain the same.

Fields on the details tab may be edited as needed on the new plan.

Other Important Things to Note
- The Strengths, Goals, Tasks and Observations tabs will retain all historical data as plans are rolled forward, but filter to show data associated to the current year by default.
- Only one plan can be created per student, per year. If you attempt to create a plan for a student who already has one for the selected year, an error message will be surfaced.
- Surveys, Additional Services and Communications tabs are all year-based and will not carry forward.