

Frontline IEP/504/RTI Web Series: Collaboration Portal

Frequently Asked Questions—

- 1. Q: Will this Web Training topic be available as a recorded version?**
A: Yes. This topic was posted in Frontline IEP/504 under the Messaging Tab for Central Office Personnel and within the Learning Center.
- 2. Q: Is there an additional cost for Collaboration Portal? Does it replace the Parent Portal available within some Student Management Systems (SMS/SIS)?**
A: No. There is no additional cost for Collaboration Portal. No, Collaboration Portal does not replace the Parent Portal that some districts may have through their SMS/SIS systems.
- 3. Q: Is there any instructional documentation for staff or parents to use in understanding the Collaboration Portal?**
A: Yes, there is a video that a recipient can watch as they receive the email. There are user guides for parents and other district staff available in the Learning Center for each solution (IEP/504/RTI).
- 4. Q: Is there a way to use a document (not generated from/available on the Letters/Reports tab) in the Collaboration Portal to be sent to recipients (such as parents)?**
A: Yes. You will need to save the document from an outside source as a PDF first. Then you may send the document using Collaboration Portal to any recipients you choose.
- 5. Q: Would a district need to obtain the parent's consent to send documentation to them through Collaboration Portal first?**
A: Please check your individual state's regulations and guidance. In some states, the district may need to obtain the parent's consent to be able to send them education documents for their child.
- 6. Q: Will the document signed/submitted back to the district automatically save in the student's Document Repository? If the document exists already in the Document Repository for the student, can you send that to Collaboration Portal automatically? Will the document sent via Collaboration Portal automatically save to the student's Document Repository?**
A: There is no direct automation between Collaboration Portal and a student's Document Repository at this time. You may save a document in PDF format from a student's Document Repository to a folder of your choosing and then use Collaboration Portal to send it to specific recipients. Likewise, when you have a document signed/submitted from a parent you may download the signed document to a folder of your choosing and then upload that document to a student's Document Repository.
- 7. Q: Which staff are included under each permission level within a Frontline system (such as IEP, 504 and/or RTI)?**
A: Each district determines what permission level to assign each individual staff member. Please review your Manage Users screen in Maintenance >> Administrative Functions to see what permission level your district assigns different staff.
- 8. Q: When publishing a document through Collaboration Portal, is there a limit to the number of recipients you can add in?**
A: No, you may add as many recipients as you need.

9. Q: Which permission levels have access to add the student's email address in the Master Demographics section?
A: In most districts, the CO Supervisor/District Supervisor level permissions are the only staff that can add/revise fields within the student's Master Demographics. Please check with your district's administrator in charge of the specific system (IEP/504/RTI) for more guidance.

10. Q: Will a recipient know who is sending them a document?
A: The email will have the following subject line format: "User Name (such as Mary Jones) shared a Collaboration Document with you". The user that prepares and sends the document via Collaboration Portal will have their name contained in the subject line of the email that each recipient receives.

11. Q: How do the parent/guardian emails get added to the student record/master demographics? If the district has Centris Sync but the parent/guardian email is not already within the Student Management System (SMS/SIS)? Will the parent's regular email be used?
A: If your district has Centris Sync, the regular syncing with your Student Management System (SMS) will bring the parent/guardian emails into your Frontline system if they already exist in the SMS.

If your district does not have Centris Sync, you will need to gather the parent/guardian email address(es) and enter them within the student record under Master Demographics for each contact.

The email address for the parent/guardian that exists in the SMS or is entered by hand in the student demographics section will be the email that displays automatically as you publish a document from the Letters & Reports screen in the Frontline IEP, 504 or RTI systems.

12. Q: Is the Collaboration Portal available in Frontline ESA?
A: Not at this time. We are investigating reports in ESA to determine which reports would be appropriate to be published to the Portal.

13. Q: Will all the recipients be included in one email (so that each recipient can see who else was sent that document)?
A: Each recipient that you add in publishing the document through Collaboration Portal will receive their own email and no other recipients will be listed.

14. Q: Can a phone number for a recipient be added instead of an email?
A: The Portal currently requires a valid email address for each recipient. The option for SMS so that documents could be sent via text messaging is being investigated.

15. Q: If sending a sign-in sheet for a virtual meeting, can all attendees sign the one document? Will each attendee be able to sign the document/sign in sheet at the same time?
A: Yes, you may process a sign-in sheet to be signed by all participants in a virtual meeting. Only one person at a time will be able to access/open and sign the document. Once the person signs and submits the document, the next person will be able to use the access code to display the document and add their own signature. The district user that sent the document will then be able to see and download a copy of the completed document from their Collaboration Portal.

16. Q: If you are sending a document through Collaboration Portal, will the district still need to retain a paper copy of that document?
A: Please check your own district policies and your state's policies/regulations regarding maintaining student documentation. Best practice is to retain a copy of each document processed and sent to the parent/guardian.

17. Q: Can a progress report be processed and sent through Collaboration Portal to the parent/guardian? What other kinds of documents can be sent in Collaboration Portal?

A: Yes, a progress report can be sent to the parent/guardian through the Collaboration Portal. Due to the requirement that each document be acknowledged individually, however, districts may want to limit the number of students for whom progress reports are published to the portal simultaneously.

18. Q: Once the document is sent to the recipients, how do you know they have viewed/signed the document? Is there an alert that the user receives that the document is complete?

A: The district user who published/sent the document will be able to view all documents in their own Collaboration Portal. To access that, simply click the “?” near your name in the top right corner of the Frontline system. Then click the Collaboration Portal link.

19. Q: Once the document is signed/submitted by the parent/guardian, can the district user download or print a copy of the signed document?

A: Yes. Simply click the “?” near your name in the top right corner of the Frontline system. Then click the Collaboration Portal link. Locate the document you want to download and then click the name of the document. Once the document displays, click the down arrow in the upper right corner and select download.

20. Q: Does the recipient have any instructions or help when they receive the email in order to know what to do?

A: There is a video that a recipient can watch as they receive the email. There are user guides for parents and other district staff available in the Learning Center for each solution (IEP/504/RTI).

21. Q: Is there a limit to the number of students I can select on My Students before going to Letters/Reports to select and publish to the Collaboration Portal?

A: No, however, due to the requirement that each document be acknowledged individually, districts may want to limit the number of students for whom reports are published to the portal simultaneously.

22. Q: If you process a document from the Letters/Reports screen, do you have to use Collaboration Portal or can you simply print the document to send in a different method?

A: Districts are not required to use the Collaboration Portal. The Portal was introduced to assist users who are not working in their typical settings and may not have access to printers, etc.

23. Q: If when you schedule a meeting, you use the “Send Email” feature to alert attendees via email to the meeting, do you still need to process a Meeting Invitation document from the Letters/Reports screen for the parent/guardian in addition?

A: Please review your state’s requirement for prior written notice of a meeting as the contents of the email that is sent via the scheduling feature may not meet those requirements. In that case, you will need to also process the Meeting Invitation from the Letters & Reports screen to send to the parent. You may print the prior written notice of the meeting (meeting invitation) or publish the document through the Collaboration Portal.

24. Q: Is the email that the recipient receives using Collaboration Portal secure? Does that email meet any of the Student Data Privacy laws/regulations?

A: Yes.

25. Q: Will a document, such as the Agenda Report be able to be processed/send via the Collaboration Portal?

A: No, the Agenda Report includes a list of students. The Collaboration Portal is meant to be used in instances where there is a separate report for each student.

26. Q: How will a recipient (who is not the student’s parent or guardian) know what the access code should be in order to open/view the document sent to them via Collaboration Portal?

A: The email includes an Access Code “hint” that informs the recipient of the pattern for the code, which is the first three letters of the student’s last name (all caps) plus his/her date of birth (mmddyyyy)

- 27. Q:** If the district is sending a parent/guardian documents for more than one child in the family, how will the parent know which access code will open each email/document?
- A:** The parent has five opportunities to enter the correct access code.
- 28. Q:** How long does it take for the recipient to actually receive the email/document sent via Collaboration Portal?
- A:** The email is sent as soon as the user clicks “Create Document”.
- 29. Q:** Once the recipients return the signed document through Collaboration Portal, should I save the document somewhere?
- A:** Please check your own district policies and your state’s policies/regulations regarding maintaining student documentation. Best practice is to retain a copy of each document processed and sent to the parent/guardian.
- 30. Q:** Will there be an icon/tab on the left side Navigation pane for Collaboration Portal added/available?
- A:** This suggestion will be sent to our team for consideration of future enhancements.
- 31. Q:** Is there a size limit for the file/document being sent through Collaboration Portal?
- A:** No.
- 32. Q:** Can you send multiple outside sourced documents together to a recipient?
- A:** No. If you have the documents all saved as the same PDF file, then you may use Collaboration Portal to send them all in one email/publish.
- 33. Q:** Will the system generated message also be included automatically in the email when sending an outside sourced document in Collaboration Portal?
- A:** No. You will need to add the message or hint for the access code in the Messaging textbox that displays as you prepare the document to be sent to the recipient(s).
- 34. Q:** Can a recipient print or download a copy of the document sent to them?
- A:** Yes.
- 35. Q:** Will documents signed and submitted by parents/guardians through Collaboration Portal meet the requirements for consents according to Medicaid or other state laws/regulations?
- A:** The electronic signature is the legal equivalent of a handwritten signature on a paper form.
- 36. Q:** Will the parent video and/or written instructions be available in languages other than English?
- A:** This suggestion is currently under review.
- 37. Q:** If a meeting invitation and a Draft IEP (for examples) are processed for a student at the same time and available on the processing center screen, can both documents be published to Collaboration Portal so that they go to the recipient in one email?
- A:** Each document processed for a selected student from the Letters & Reports screen would be published separately. The recipient(s) would receive a separate email for each document.
- 38. Q:** Will Collaboration Portal be decommissioned after the COVID19 crisis is over?
- A:** It will continue to be available.
- 39. Q:** What are the terms that the recipient sees and must agree to when opening the email/document sent via Collaboration Portal?
- A:** The following text displays for each recipient as they use the Access Code to view the document sent:
Electronic Signature Agreement. By using the annotation tools to sign, I have electronically signed it. I agree that my electronic signature is the legal equivalent of my handwritten signature on a paper form. I consent to be legally bound by the terms and

conditions of the form and also attest to the accuracy and validity of the data and information on the form, to my best information and knowledge.

Please check with your local district policies and state regulations for further clarification.

40. Q: When processing a letter from the Letters & Reports screen that would typically display as a Word document, will that remain a Word document when published to Collaboration Portal/sent to a recipient?

A: When you select and process an item from the Letters & Report screen that typically processes as a Word document (to be printed), as you click Publish, the document will be converted to a PDF and sent to the recipient(s) you choose.

41. Q: Should districts send documents via Collaboration Portal to students that are not of transition age?

A: This is a district decision.

42. Q: Is the access code case sensitive that the recipient/parent would use to open/view the document sent via Collaboration Portal? Is the access code listed within the message/email directly or is sent in a follow up email?

A: The Access Code automatically generated for the document as you process and publish it from the Letters & Reports screen is case sensitive. The system generated message that accompanies the email to each recipient also indicates this.

The Access Code is NOT listed within the message contained in the email to the recipient(s). However, there is a hint as to what the access code could be.

43. Q: When the recipient signs the document, do they first need to have a touchscreen device in order to sign? Will their signature have a date/time stamp or indication on it? Will the signed document have an indication that the signature was obtained electronically?

A: The recipient(s) do not need to have a touchscreen on the device that they use to access the email. There are built-in tools on the screen for the recipient to use.

If the document contains a built-in line/section for a date to be entered, the recipient(s) may enter/type in a date. There is not an automatic date/time stamp that accompanies the document.

The completed document, when the user that sent the document views it in their Collaboration Portal, will not have any marking or automatic indicator that the document was signed using electronic methods.

44. Q: If you are processing an invitation letter and a draft plan, will those be sent via Collaboration Portal in one email to the recipients or will each document process/be sent in separate emails?

A: Each document processed for a selected student from the Letters & Reports screen would be published separately. The recipient(s) would receive a separate email for each document.

45. Q: Will letters that are already set to auto-log in Process Tracking/Log also be logged in Process Tracking/Log as having been sent via the Collaboration Portal?

A: There is no indication that a letter set to auto-log in Process Tracking was sent via Collaboration Portal.

46. Q: Is Collaboration Portal accessible via the student record (such as clicking in the student name from the My Students screen or clicking on the document indicator button)?

A: If a user has permission, the Collaboration Portal is accessible by clicking the "?" near the user name (upper right corner of the screen) and then clicking the Collaboration Portal link.

47. Q: As a user sends a document via Collaboration Portal, can you type in additional messaging or notes that would also be contained in the email that each recipient gets? Can individual user notes be added even if the district has added text in Maintenance that automatically displays as well?

A: Yes, the user publishing the document to the Collaboration Portal may enter additional text which will be contained in the email that the recipient(s) receive. The Additional Message text box remains open as you publish the document, even if the district has added text in Maintenance that automatically appears.

48. Q: When clicking the Add Team button as you send a document to recipients via the Collaboration Portal, where are those names/email addresses coming from?

A: The Add Team button as you publish a document will pull in the attendees listed on the latest scheduled meeting in the system for the student.

49. Q: Can a district send reports or other documents (not processed from Letters & Reports screen) to an outside agency or school for a student?

A: Yes, the Collaboration Portal can be used to send any recipient(s) documents that are generated/saved in outside sources.

50. Q: If the parent does not want to electronically sign the document but would rather print it, sign the paper version and send that paper back to the district via regular mail service, can they?

A: The recipients will have the ability to download and print the document. The recipient may choose to sign and return a paper copy to the district.

51. Q: Can a Director or Administrator view all documents sent by individual office staff in their district?

A: No, not at this time. This is being considered for a future enhancement.

52. Q: If the recipient does not open their email in a timely manner, will the document need to be sent via Collaboration Portal again?

A: If the recipient does not open/access their email within a few days, when they do click on the button to access the document, the system will display a message indicating that the link has expired. The system will then automatically send a new email to the recipient.

53. Q: If my district has Parent Portal, would I need to use Collaboration Portal?

A: If the district has Parent Portal as part of their Student Management System, you will have the ability to use both. It will be a district decision to use one or both.

54. Q: If when clicking Add Parent/Guardian button when sending a document via Collaboration Portal, the email or parent name is incorrect, can I make corrections on that screen? Or do the corrections need to be made in another part of the Frontline system (IEP/504/RTI)?

A: If the email is incorrect for a parent that automatically displays as you click the Add Parent/Guardian button, you may delete that item and click the Add Individual button to type in the correct email. We would recommend that you also correct the source of the parent/guardian email (this could be the SMS or the student demographics, depending on your system).

55. Q: Can we add a custom letter/report to our Letters & Reports screen and then process it to send for selected students using the Collaboration Portal publish button the processing center screen?

A: Yes, you may add custom letters to the Letters & Reports screen and then process them to publish to recipients through Collaboration Portal.

56. Q: Will the message that the recipient gets only display in English?

A: At this time, the message that the recipient receives in the email is in English. The recipient may use an outside translation feature to convert the message to another language.

57. Q: Can districts send the procedural safeguards notice (such as PRISE in NJ, or 504 safeguards) to a parent using the Collaboration Portal?

A: Yes, if the document is available for processing from the Letters & Reports screen, simply select the students and the item to publish it through the Collaboration Portal.

If the document does not exist on the Letters & Reports screen, you may click the “?” near the user name (upper right corner of the screen) and then click the Collaboration Portal link to begin sending the document to the recipient(s).