



Dossier Collaborative Response Model Module

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The following document is an outline for user documentation for the Dossier Collaborative Response Model Module (CRM).

Layout of this document is focused on typical workflow regarding initial and further use of CRM. This will lead through Settings, the concept of student groups and then typical workflow usage of the module

Getting Around the System

Dossier navigation works by a module, top and in some cases left navigation areas.

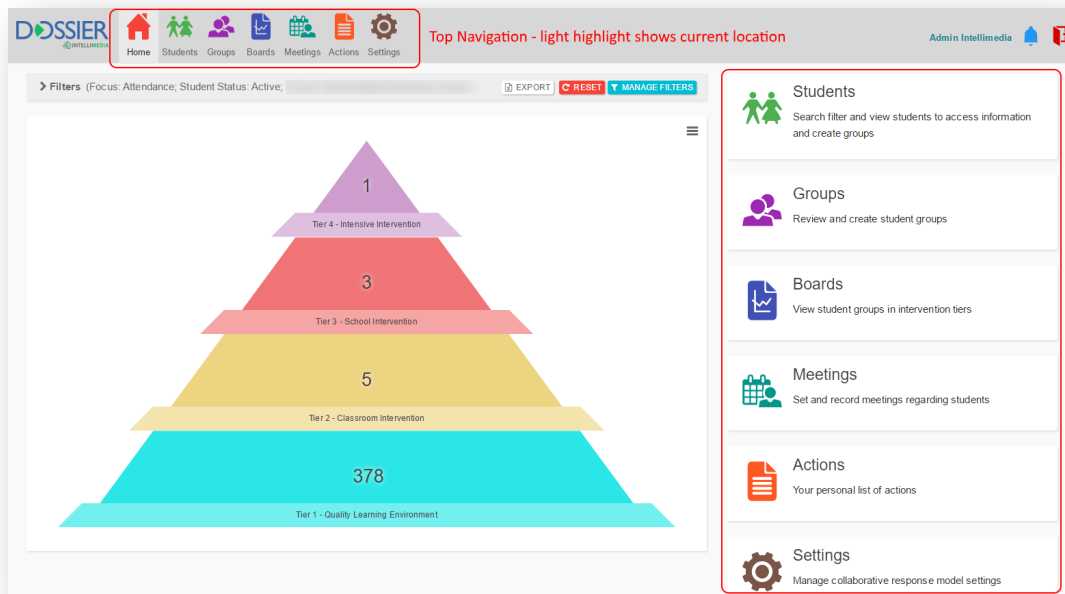
Accessing the CRM Module

After accessing Dossier: logging in or via Single Sign On, the user then has the selection of Dossier Modules that they have access to.



CRM Module Navigation

The CRM module includes both Home area navigation as well as navigation access on the top of the screen. These two areas are identical, but the home screen items have simple description of the purpose of the area.



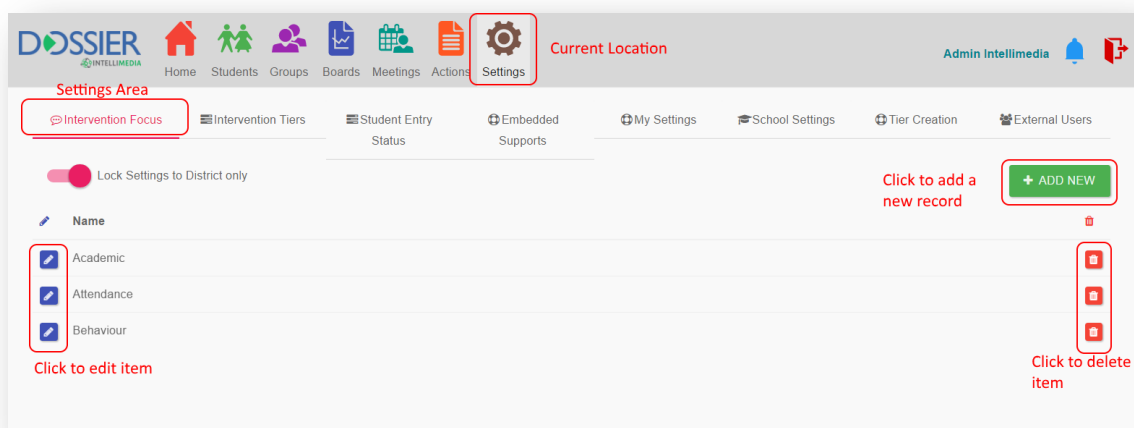
Settings

To begin using the CRM module, initial settings must be created and/or reviewed to confirm that naming conventions are acceptable by the user.

Settings mostly are used to define the language used in the system for defining level of supports and types of supports available to users.

Intervention Focus

Description of what these are – usage – suggestions. Note “Lock to district” and what scenarios you may allow this



Intervention Tiers

Description of what these are – usage – suggestions

The screenshot shows the 'Intervention Tiers' settings page in the DOSSIER application. The top navigation bar includes 'Home', 'Students', 'Groups', 'Boards', 'Meetings', 'Actions', and 'Settings'. The 'Settings' tab is active, and the 'Intervention Tiers' sub-tab is selected. A toggle switch for 'Lock Settings to District only' is turned on. The main content area displays a table with four intervention tiers. Each tier has a 'Record Order' (1-4), a 'Color' (cyan, yellow, red, purple), and a 'Name'. To the left of the table is a vertical list of edit icons (pencil) for each tier, with a red box around them and the text 'Click to edit record'. To the right is a vertical list of delete icons (trash) for each tier, with a red box around them and the text 'Click to delete record'. At the top right, there is a green '+ ADD NEW' button with a red box around it and the text 'Click to add new record'.

Record Order	Color	Name
1	Cyan	Quality Learning Environment
2	Yellow	Classroom Intervention
3	Red	School Intervention
4	Purple	Intensive Intervention

Student Entry Status

The screenshot shows the 'Student Entry Status' settings page in the DOSSIER application. The top navigation bar is the same as the previous page. The 'Settings' tab is active, and the 'Student Entry Status' sub-tab is selected. A toggle switch for 'Lock Settings to District only' is turned on. The main content area displays a table with four student entry statuses. Each status has an 'Id' (1-4), a 'Record Order' (1-4), and a 'Name'. To the left of the table is a vertical list of edit icons (pencil) for each status, with a red box around them and the text 'Click to edit record'. To the right is a vertical list of delete icons (trash) for each status, with a red box around them and the text 'Click to delete record'. At the top right, there is a green '+ ADD NEW' button with a red box around it and the text 'Click to add new Record'.

Id	Record Order	Name
1	1	Not Yet Meeting Expectations
2	2	Approaching Expectations
3	3	Meeting Expectations
4	4	Exceeding Expectations

Embedded Supports

Note – District and School Definitions

The screenshot shows the 'Embedded Supports' section of the DOSSIER application. The top navigation bar includes 'Home', 'Students', 'Groups', 'Boards', 'Meetings', 'Actions', and 'Settings'. The 'Embedded Supports' tab is selected and highlighted with a red box. Below the navigation bar, there are tabs for 'Intervention Focus', 'Intervention Tiers', 'Student Entry Status', 'Embedded Supports', 'My Settings', 'School Settings', 'Tier Creation', and 'External Users'. A green '+ ADD NEW' button is located on the right side of the 'Embedded Supports' tab.

The main content area is divided into two sections: 'District Embedded Supports' and 'School Embedded Supports'. The 'District Embedded Supports' section is titled 'District Records - available to all students' and contains a table with the following data:

Focus	Tier	Meeting Descriptor	Name	Descriptor	
Academic	School Intervention	Parent Meeting	Counseling		
Academic	School Intervention	Parent Meeting	LLI		
Academic	Quality Learning Environment	School LINK Team	Progressive muscle relaxation		
Academic	Classroom Intervention	School LINK Team	Journaling		
Academic	Intensive Intervention	School LINK Team	Breath Counting		
Attendance	School Intervention	Parent Meeting	Additional Group Reading Time		
Attendance	School Intervention	Parent Meeting	After School Club		
Attendance	Intensive Intervention	Parent Meeting	Inclusive Ed Referral		

The 'School Embedded Supports' section is titled 'School Records - available to students in the selected school'. It features a dropdown menu for 'School' with 'BEAVER LODGE ELEMENTARY SCHOOL' selected. Below the dropdown is a table with the following data:

Focus	Tier	Meeting Descriptor	Name	Descriptor	
Behaviour	School Intervention	Collaborative Team Meeting	Beaver Lodge After School Club		

My Settings

If no other filters currently active, Default Group will be selected for the user

Notification Days before: number of days before a meeting date or action due date that the user will receive email notification

The screenshot shows the 'My Settings' section of the DOSSIER application. The top navigation bar is the same as the previous screenshot. The 'My Settings' tab is selected and highlighted with a red box. Below the navigation bar, there are tabs for 'Intervention Focus', 'Intervention Tiers', 'Student Entry Status', 'Embedded Supports', 'My Settings', 'School Settings', 'Tier Creation', and 'External Users'. The 'My Settings' section contains two fields: 'Default Group' with a dropdown menu and 'Notification Days Before' with a text input field containing the value '1'. A blue 'SAVE' button is located at the bottom of the settings section.

School Settings

Area contains multiple sections for either district or an individual school to define types and descriptors

Staff Groups

Staff Groups

+ ADD NEW

Name	Members
<div> Demo Group </div>	<div> </div>

Meeting Descriptors

Meeting Descriptors

☐ Lock Settings to District only

+ ADD NEW

Name
<div> Collaborative Team Meeting </div> <div> </div>
<div> Parent Meeting </div> <div> </div>
<div> School LINK Team </div> <div> </div>

Student Note Types

Student Note Types

☐ Lock Settings to District only

+ ADD NEW

Name
<div> Strengths and Interests </div> <div> </div>
<div> Learning Preferences </div> <div> </div>
<div> Behavioural Information </div> <div> </div>
<div> Medical Information </div> <div> </div>
<div> Additional Information </div> <div> </div>

Tier Creation

Note: not fully implemented yet. Students are set to Tier Manually

The screenshot shows the 'Tier Creation' page in the Dossier CRM. The top navigation bar includes 'Home', 'Students', 'Groups', 'Boards', 'Meetings', 'Actions', and 'Settings'. The 'Settings' menu is expanded, showing options like 'Intervention Focus', 'Intervention Tiers', 'Student Entry Status', 'Embedded Supports', 'My Settings', 'School Settings', 'Tier Creation' (highlighted), and 'External Users'. Below the navigation, there is a dropdown menu for 'Tier Value Method' with 'MANUAL TIER SETTING' selected. A blue 'SAVE' button is at the bottom.

External Users

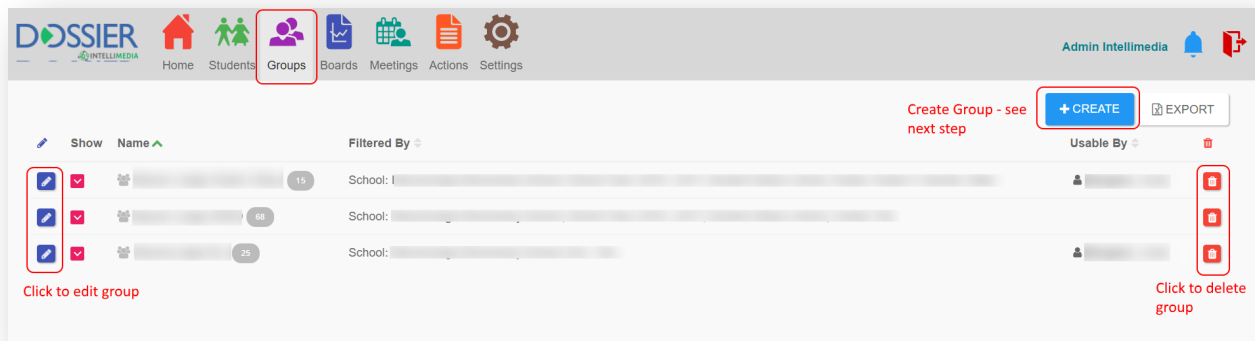
The system allows for the definition of external users and noting their participation or responsibility in meetings or actions

The screenshot shows the 'External Users' page in the Dossier CRM. The top navigation bar is the same as the previous page. The 'External Users' menu item is highlighted. Below the navigation, there is a green '+ ADD NEW' button and a red 'RESET' button. A 'Filters' section is visible, containing a 'Keyword' search bar and a 'School' dropdown menu with 'Select School...' as the current selection. Below the filters, there is a table with the following data:

Last Name	First Name	Email	Position	Schools
House	Greg	greg.house@intellimedia.ca	M.D.	Beaverlodge Elementary School

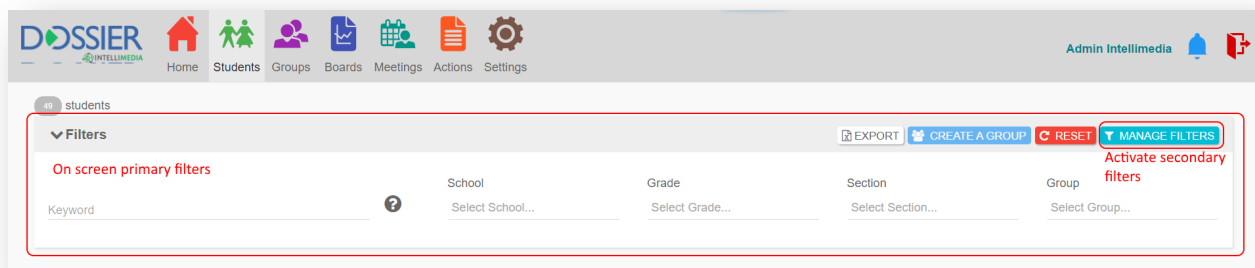
Student Groups

Student groups are at the core of the CRM module as definition of groups allows for more targeted review and simple student identification for meetings. The Groups page shows the groups the user has access to and the "Show" column controls which groups are currently available in filters



Creating a group

Creating a group relies on introduction of filters in the CRM system. The process for creation of a student group starts at the Student List page:

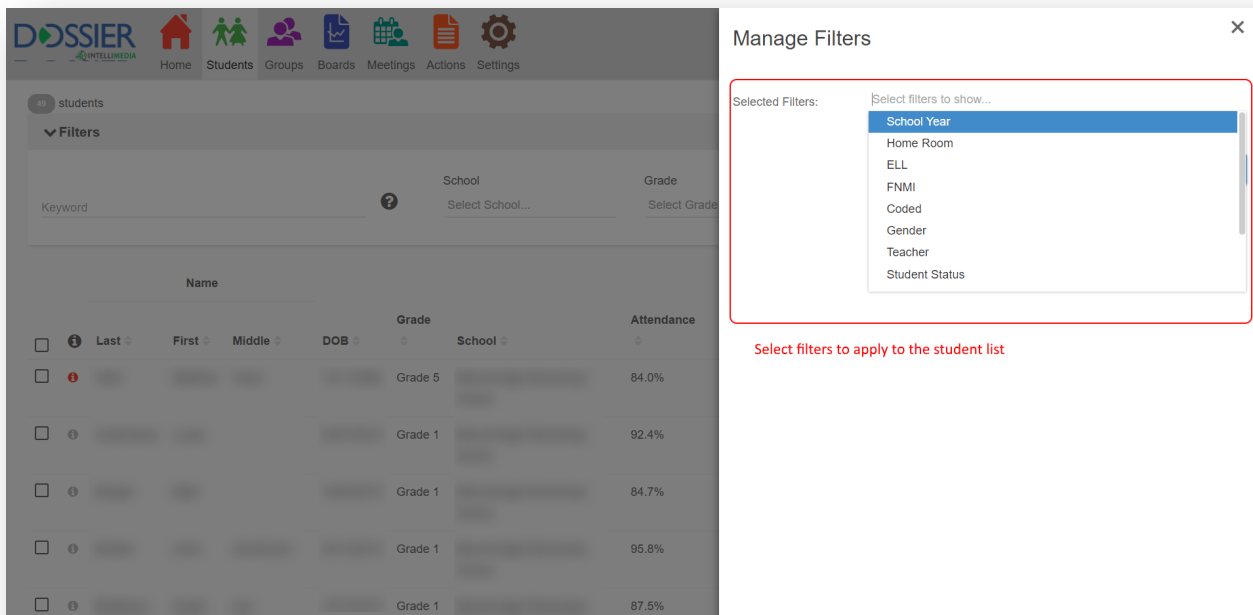


Filters are split into primary and secondary filters:

Primary seen on screen in the filter area:

- Text search
- School selection
- Grade
- Section
- Student Groups

Secondary triggered my clicking “Manage Filters”



- School Year – if not selected defaults to the current year
- Home Room – PowerSchool home_room field
- ELL – English Language Learner – Yes (only ELL students), No (do not include ELL students), All (same as not applying the filter)
- FNMI – First Nation, Metis, Inuit – similar options as ELL
- Coded – Special Education Coded Students – similar options as ELL
- Gender – Not selected (no filter) , Male (male students only), Female (female students only)
- Teacher – students that have the selected teacher for one of their assigned sections
- Student Status – Active, Inactive – defaults to active if not selected
- [Intervention Focus] - select Tier(s) – show the students that have the selected Tier in the identified focus
- Attendance – Slider to select a range – show students with current (year to date) attendance value

Application of Filters

Filters will show in the Header of the filters area and the list of students will be those matching each of the selected filters

DOSSIER Home Students Groups Boards Meetings Actions Settings Admin Intellimedia

74 students

Filters (Gender: Female; ELL: Yes) Currently Active Filters

EXPORT CREATE A GROUP RESET MANAGE FILTERS

Keyword School Select School... Grade Select Grade... Section Select Section... Group Select Group...

List of Female, ELL Students

Name		DOB	Grade	School	Attendance	CRM Meetings	ELL	FNMI	SPED	Academic	Attendance	Behaviour
<input type="checkbox"/>	Last First Middle		Grade 3		91.0%	1	303			1	1	1
<input type="checkbox"/>	Last First Middle		Grade 3		95.4%	0	301			1	1	1
<input type="checkbox"/>	Last First Middle		Grade 8		100.0%	0	301			1	1	1
<input type="checkbox"/>	Last First Middle		Grade 10		84.8%	0	303			1	1	1
<input type="checkbox"/>	Last First Middle		Grade 9		98.4%	0	301			1	1	1

Selection of Students for group

Selection of students for group is done by using the checkbox column to indicate which students will be placed in the group. The checkbox in the header can be used to select all filtered students.

74 students

Filters (Gender: Female; ELL: Yes)

Keyword

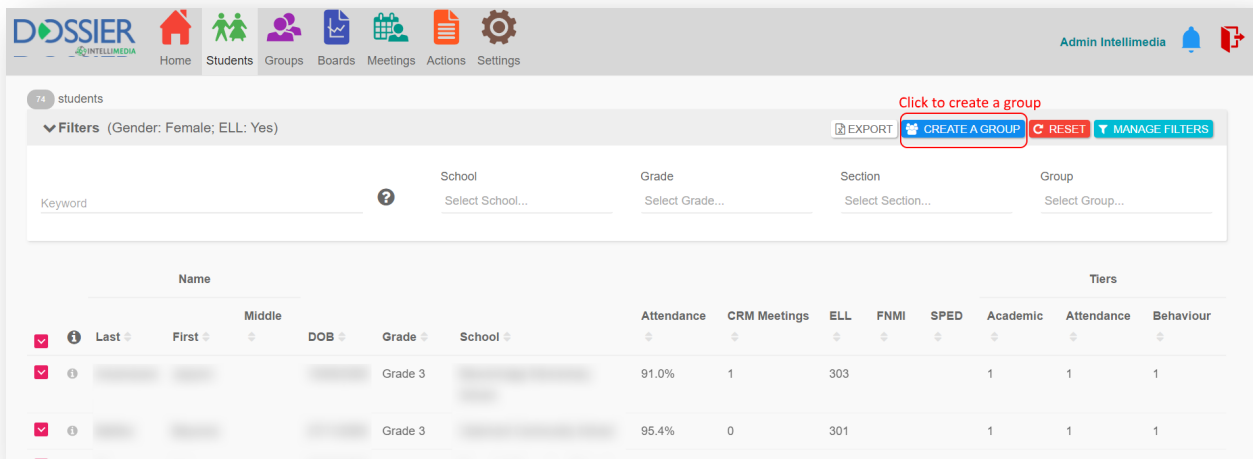
Click Header to select all students

<input checked="" type="checkbox"/>	Name	DOB	Grade	School	Attendance	CRM Meetings	ELL	FNMI	SPED	Academic	Attendance	Behaviour
<input checked="" type="checkbox"/>	Last First Middle		Grade 3		91.0%	1	303			1	1	1
<input checked="" type="checkbox"/>	Last First Middle		Grade 3		95.4%	0	301			1	1	1
<input checked="" type="checkbox"/>	Last First Middle		Grade 8		100.0%	0	301			1	1	1
<input checked="" type="checkbox"/>	Last First Middle		Grade 10		84.8%	0	303			1	1	1
<input checked="" type="checkbox"/>	Last First Middle		Grade 9		98.4%	0	301			1	1	1

Select individually to further limit the group

Creation of the Group

When the students are filtered and selected, the user simply clicks "Create a Group"



This exposes an interface to name and give access to the group.

Add new Students Group

Name

Name

Filtered By

Gender: Female; ELL: Yes

Give Access to

Select User...

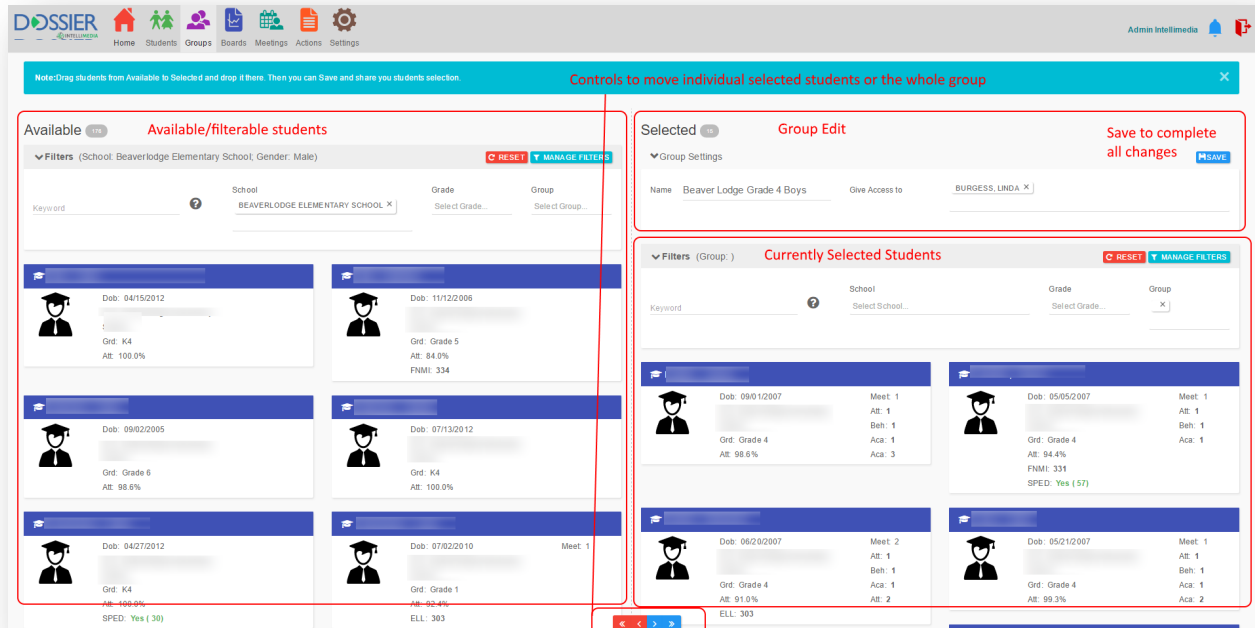
CANCEL

SAVE

Modifying Groups

Groups can then be modified by their creator or by a user with access to the group. Editing a group exposes an interface that displays:

1. Left - a list of filterable students that are not part of the group
2. Right – list of students in the group and ability to rename, give access to the group
3. Controls – click students in either list and use the arrow controls to add them or remove them from the group

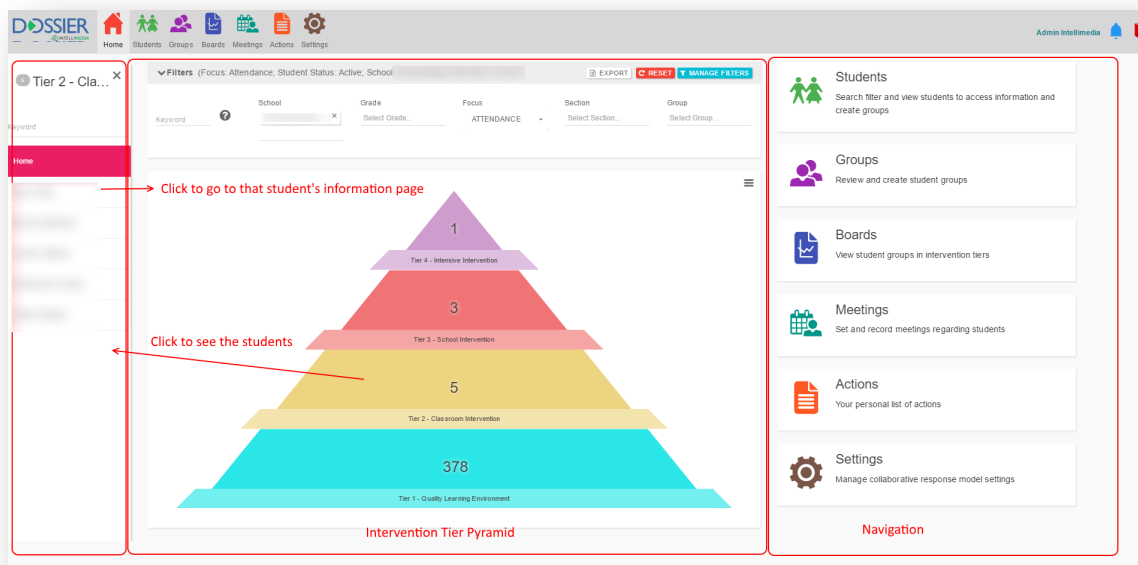


Reviewing Current Data

Once settings are in place and the process of creating groups is complete the users may now perform the two main tasks in the system: Review of students and the Meeting process

Reviewing Current Data – Home

Pyramid shows count of students (filtered) in each of the Tiers for the filtered Intervention Focus



Tiers may be clicked on to see the list of students that make up the Tier, and further clicked on to go to the student's information page (see Student Information Page section)

Reviewing Current Data – Students Information Page

The student list page as seen in the group creation section shows the list of students and certain information pertaining to the selected filters. Further, these records can be clicked on to access the student information page

The screenshot shows the DOSSIER Students Information Page. The page is divided into several sections:

- Student Demographics:** Located at the top left, it includes fields for Date of Birth (09/01/2007), Meet (1), and Grade (4). It also shows a list of General Notes (Behavioural Information, Medical Information) and a Files section.
- Records and Actions:** A table in the center displays a list of records. The table has columns for Name, In Attendance, Description, and Support Team Actions. The records include '14/01/2017 - School LINK Team' and '25/01/2017 - Ad Hoc Meeting'.
- Student Notes and Alerts:** A section on the left side of the page, below the demographics, containing a list of notes and alerts.
- Files Uploaded to the student record:** A section at the bottom left, below the notes and alerts, containing a list of files uploaded to the student record.

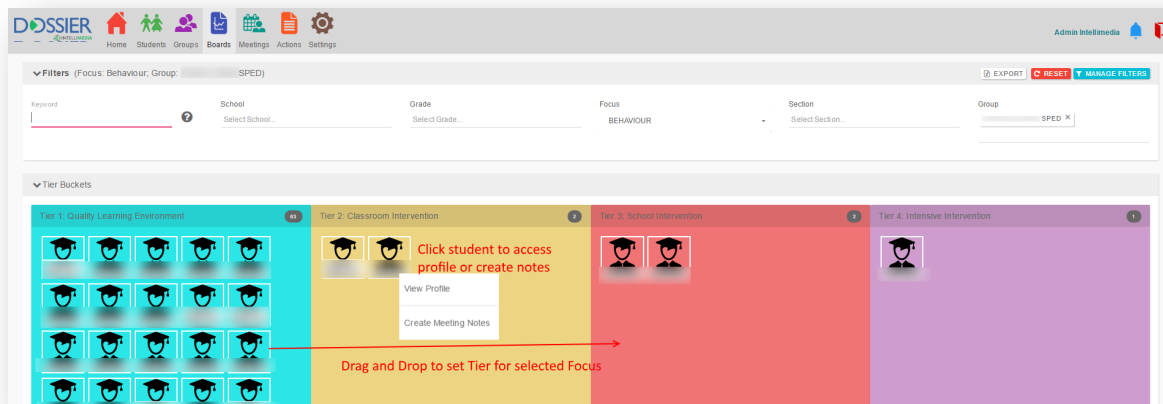
Red arrows point from the 'Student Demographics' section to the 'Student Notes and Alerts' and 'Files Uploaded to the student record' sections. Another red arrow points from the 'Records and Actions' section to the 'Records and Actions' text block.

Records and Actions:

- All meetings or Ad Hoc records regarding the student
- Expand to show actions from that record
- Actions view lists only actions for the student

Reviewing Current Data – Boards

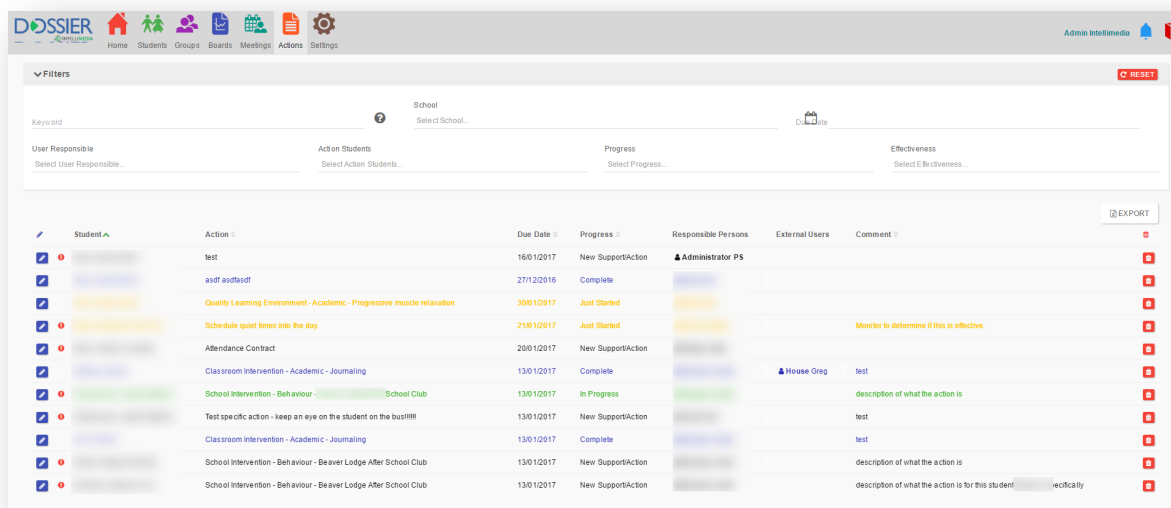
The Boards interface will also be discussed in the creation and process of Meetings. Boards can also be used with a filtered group of students.



Reviewing Current Data – Actions

The actions page allows for a user to view to progress of actions available to them. Filters allow for use-case examples like:

1. Review my actions and see what is coming due and update them
2. Review the actions of others to review effectiveness or upcoming action due dates
3. Review actions for a specific student
4. Etc



Meeting Process

The core use of the module is creation of and processing meetings. This includes

- Set up and scheduling of the Meeting
- Who is involved and for what purpose
- Running the meeting as a record of decisions and actions pertaining to specific students

Meeting Screen

The screenshot shows the DOSSIER Meetings screen. At the top is a navigation bar with icons for Home, Students, Groups, Boards, Meetings (highlighted), Actions, and Settings. Below the navigation bar is a green filter bar with a 'Filters' dropdown, a 'RESET' button, and a 'MANAGE FILTERS' button. The main area contains a table of meetings with columns: Meeting Type, Date, Staff Groups, Staff, Staff To Notify, Student Group, Student Celebrations, Other Notes, and Status. The table lists three meetings: 'Parent Meeting' (20/01/2017), 'School LINK Team' (14/01/2017), and 'Parent Meeting' (16/01/2017). Each meeting row has an 'Edit the meeting' link on the left and a 'Delete the meeting' button on the right. A '+ CREATE' button is located at the top right of the table area, with a red text prompt 'Click to create a new meeting' above it. An 'EXPORT' button is also present.

Meeting Type	Date	Staff Groups	Staff	Staff To Notify	Student Group	Student Celebrations	Other Notes	Status
Parent Meeting	20/01/2017					finished test Math completed	none	Upcoming
School LINK Team	14/01/2017					celebration 1 celebration 2	test meeting	Completed
Parent Meeting	16/01/2017	Demo Group					Be aware please prep for meeting	Completed

Clicking on the meeting provides access to the Meeting Board. While similar to the Boards area by direct access the Meeting Board provides slightly different functions:

- Student Celebrations
- Start, Conclude meetings

DOSSIER

HomeStudentsGroupsBoardsMeetingsActionsSettings

Admin Intellimedia

ELL - Parent Meeting

EDITREMOVE

EXPORTRESET

COMPLETEDStart Meeting

Filters (Focus: Academic)

Keyword? FocusACADEMIC

Tier Buckets

Tier 1: Quality Learning Environment13

Tier 2: Classroom Intervention5

Tier 3: School Intervention4

Tier 4: Intensive Intervention3

Edit the Meeting including Celebrations
Remove/Cancel the meeting

Meeting control - Start or conclude the meeting