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

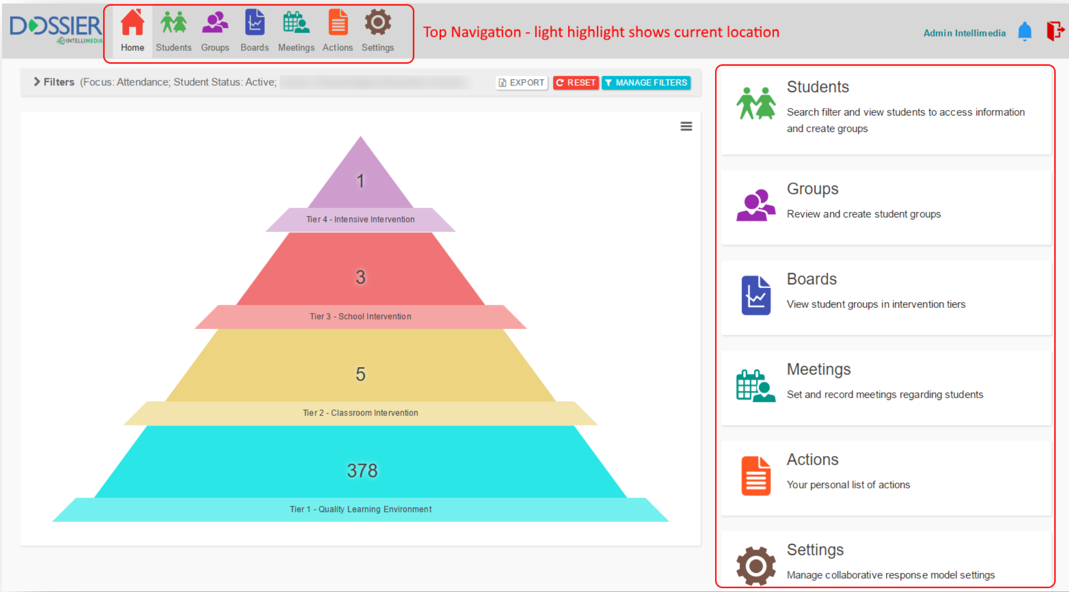
Dossier navigation works by a module, top and in some cases left navigation areas.

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.



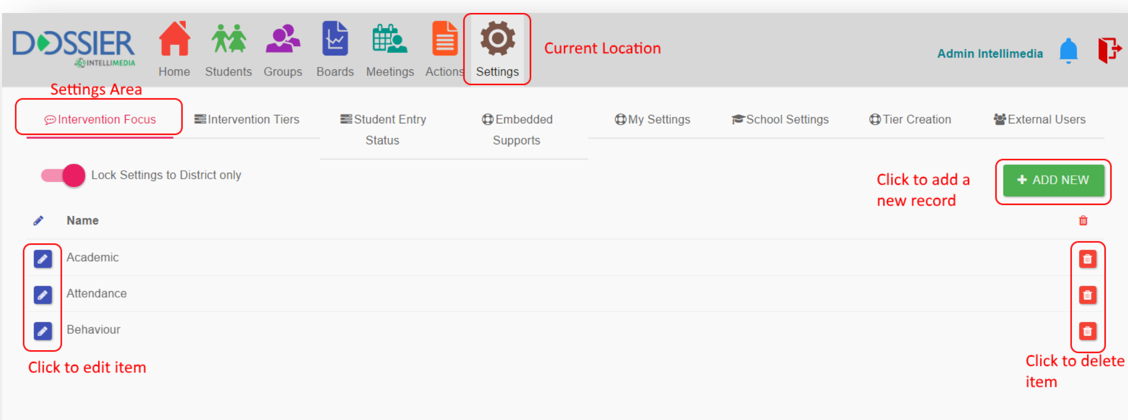
Settings

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.

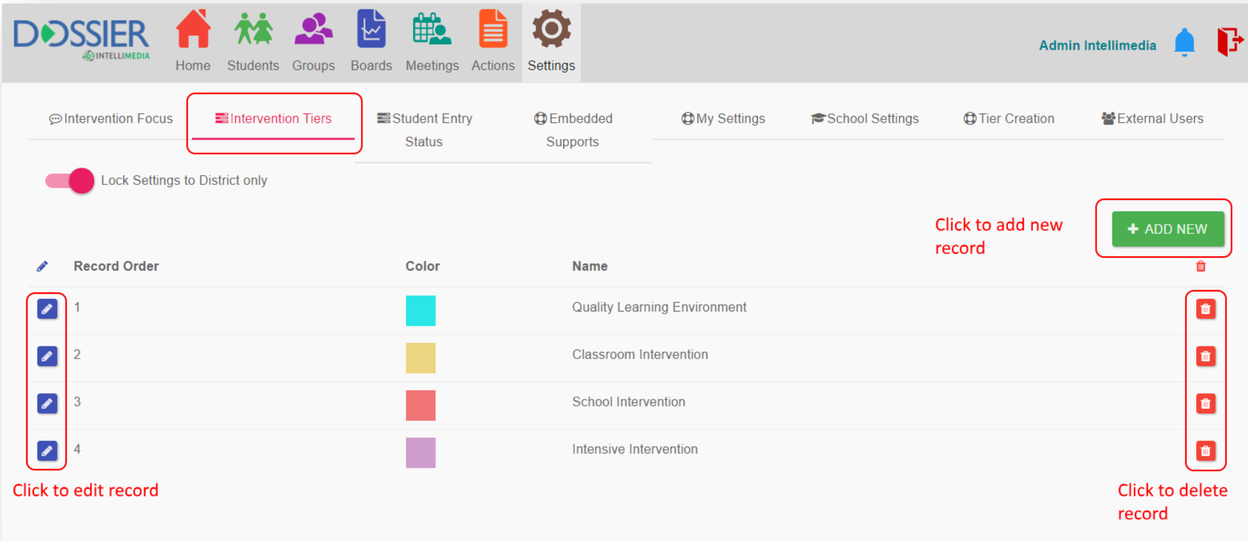
Intervention Focus

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

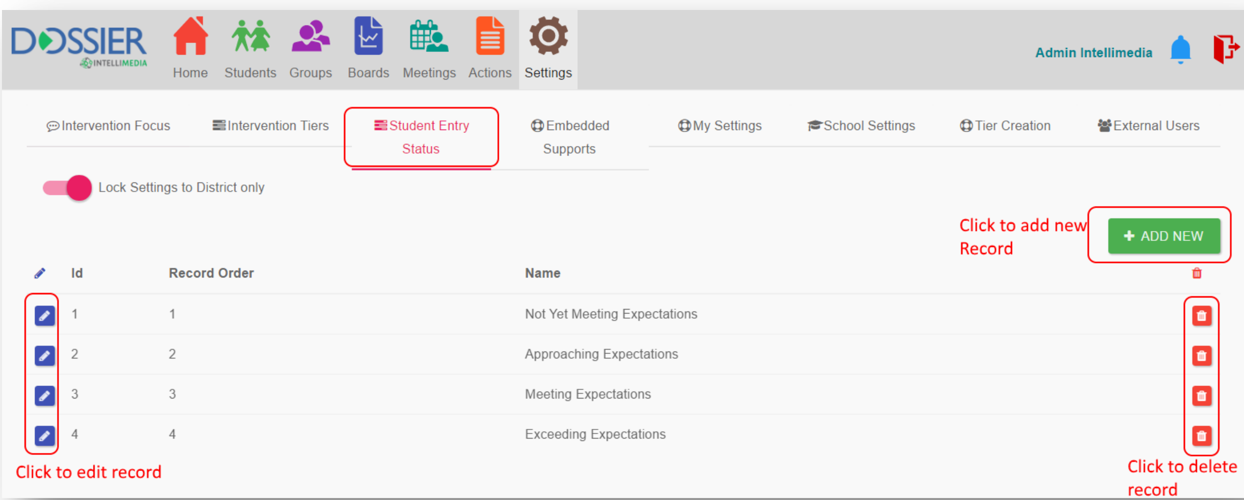


Intervention Tiers

Description of what these are – usage – suggestions

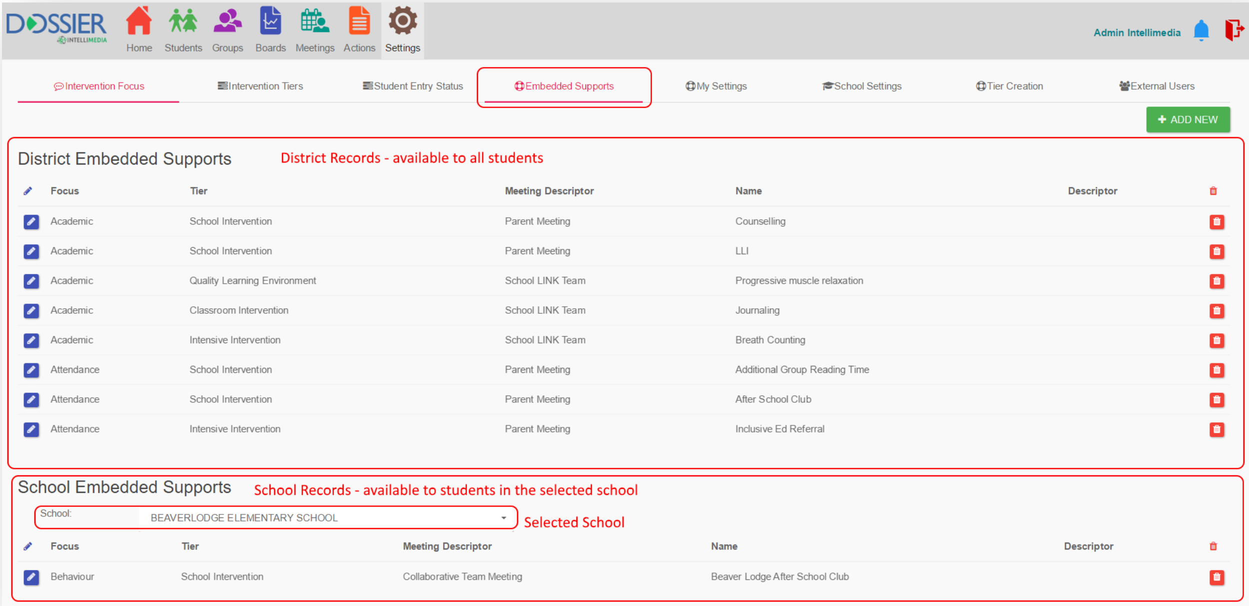


Student Entry Status



Embedded Supports

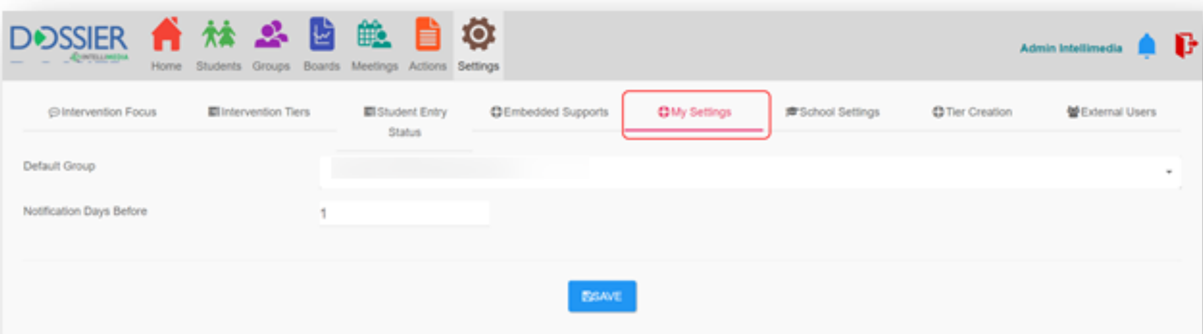
Note – District and School Definitions



My Settings

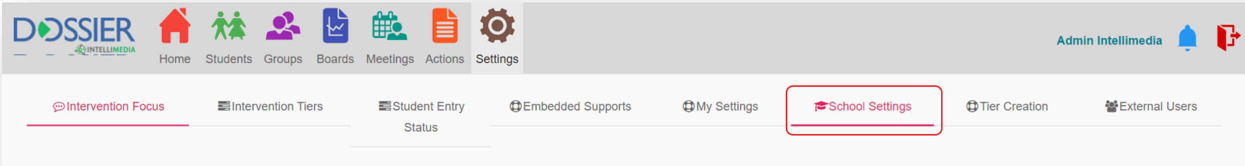
If no other filters currently active, Default Group will be selected for the user

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

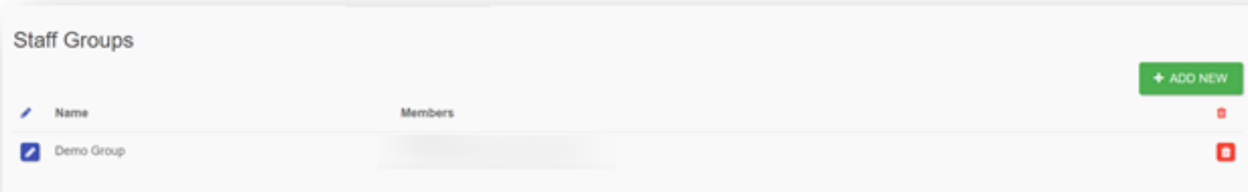


School Settings

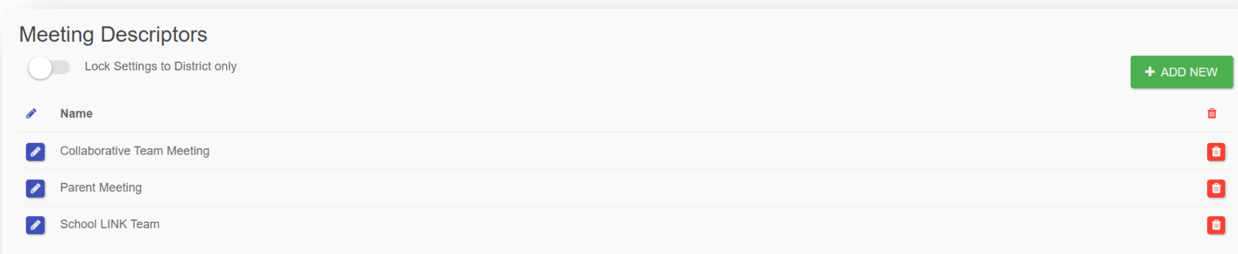
Area contains multiple sections for either district or an individual school to define types and descriptors



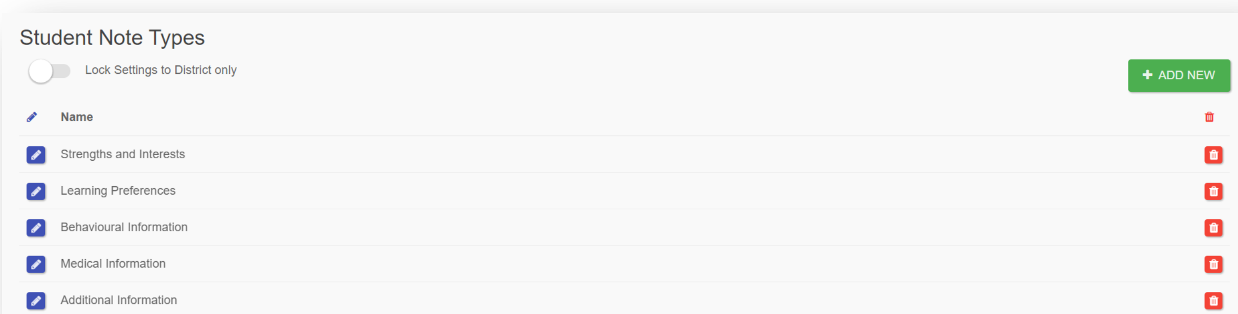
Staff Groups



Meeting Descriptors

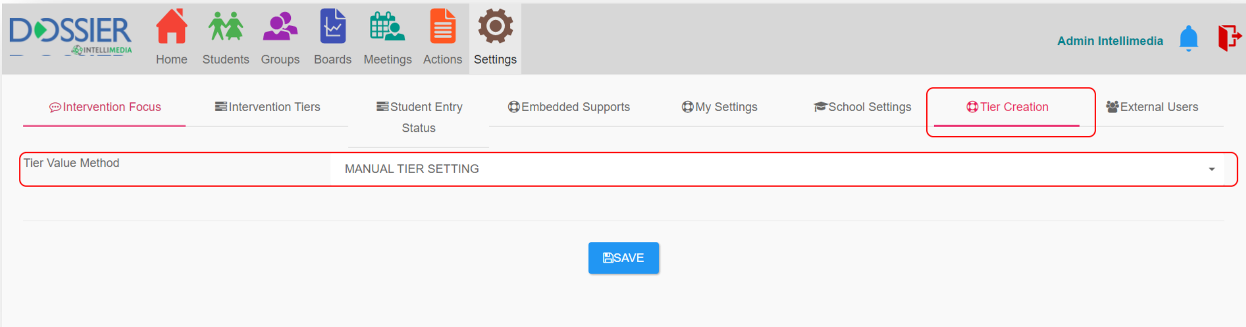


Student Note Types



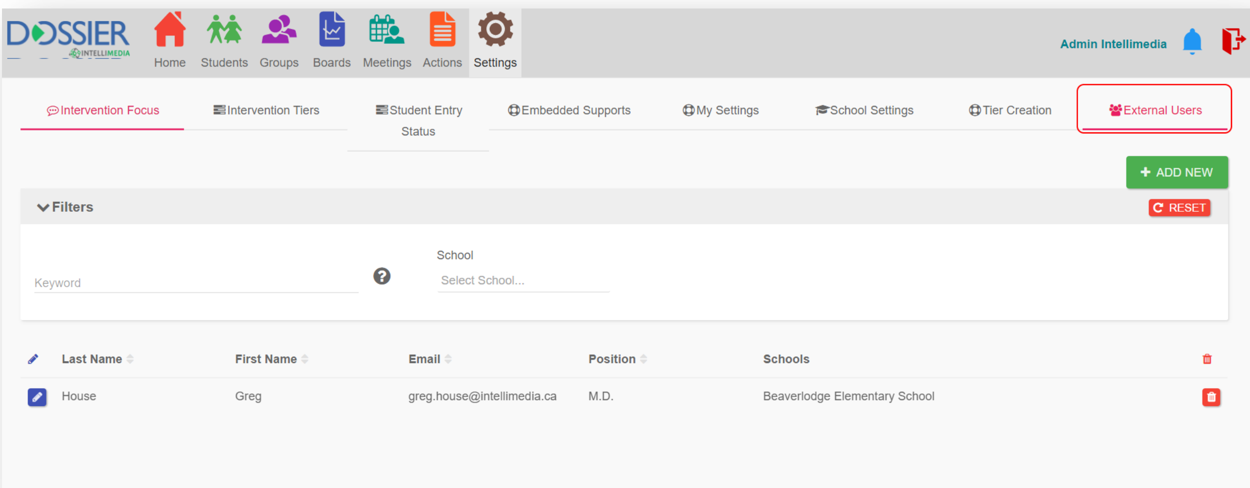
Tier Creation

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



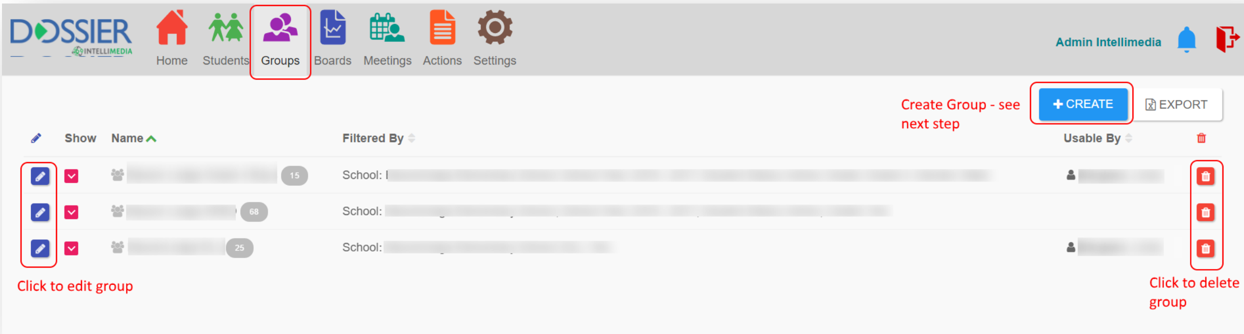
External Users

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



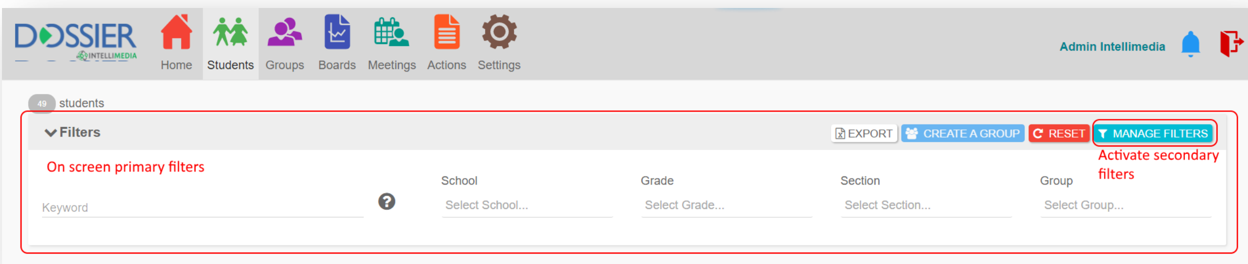
Student Groups

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:

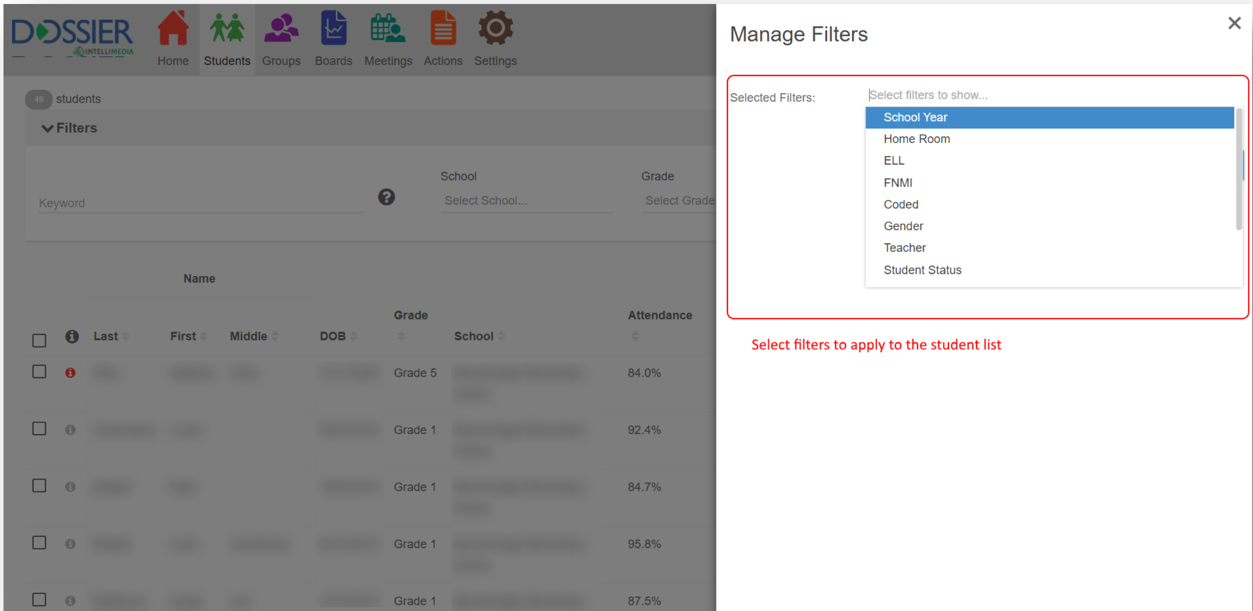


Filters are split into primary and secondary filters:

Primary seen on screen in the filter area:

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

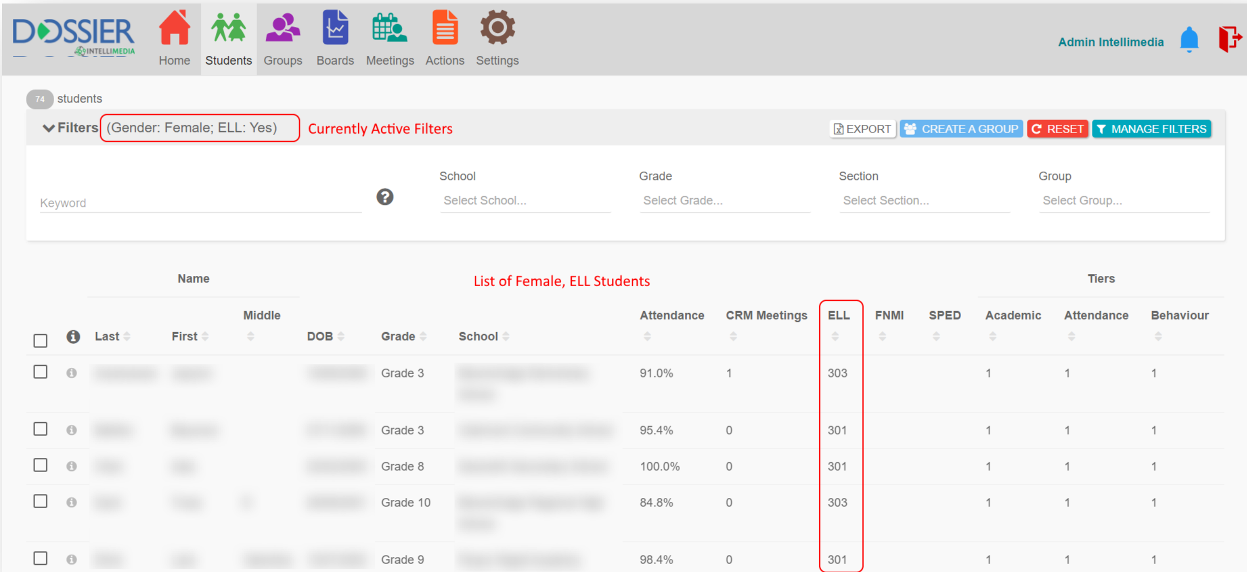
Secondary triggered my clicking “Manage Filters”



- 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

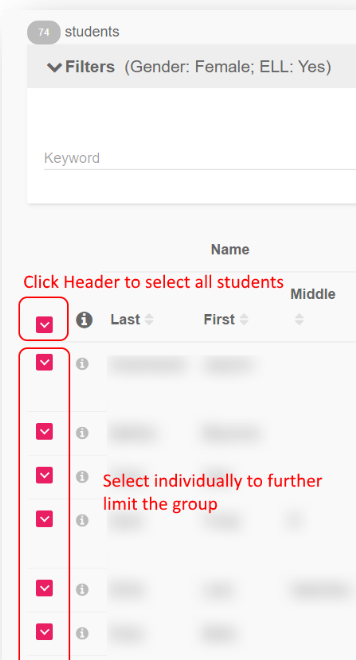
Application of Filters

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



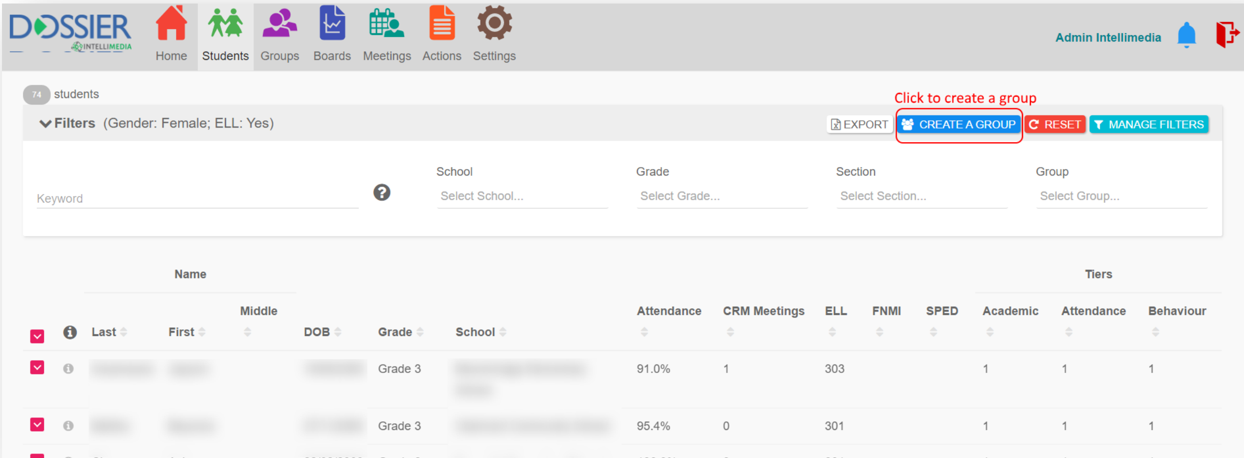
Selection of Students for group

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.

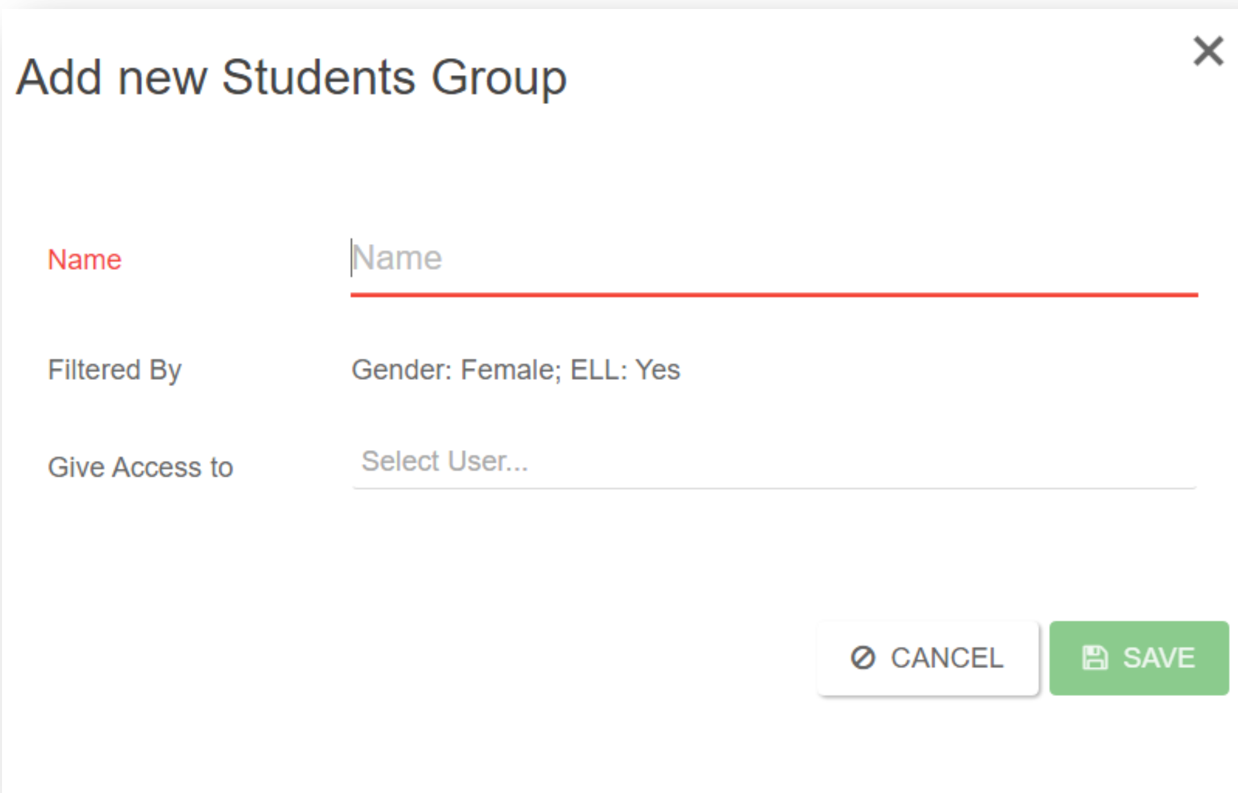


Creation of the Group

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



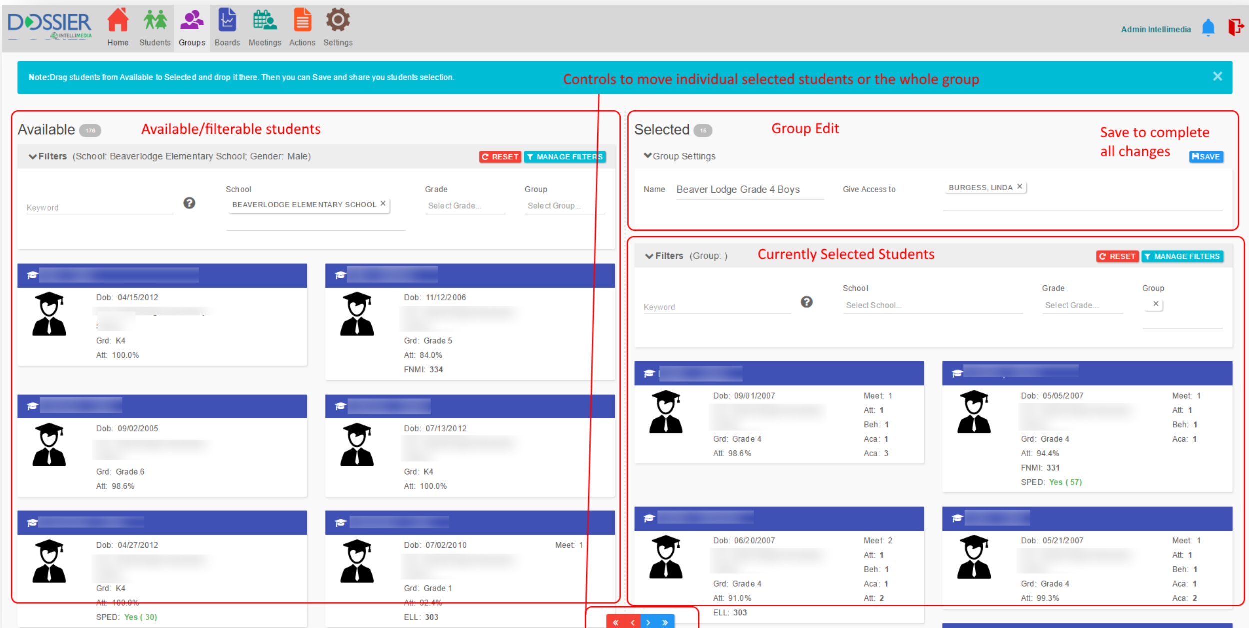
This exposes an interface to name and give access to the group.



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

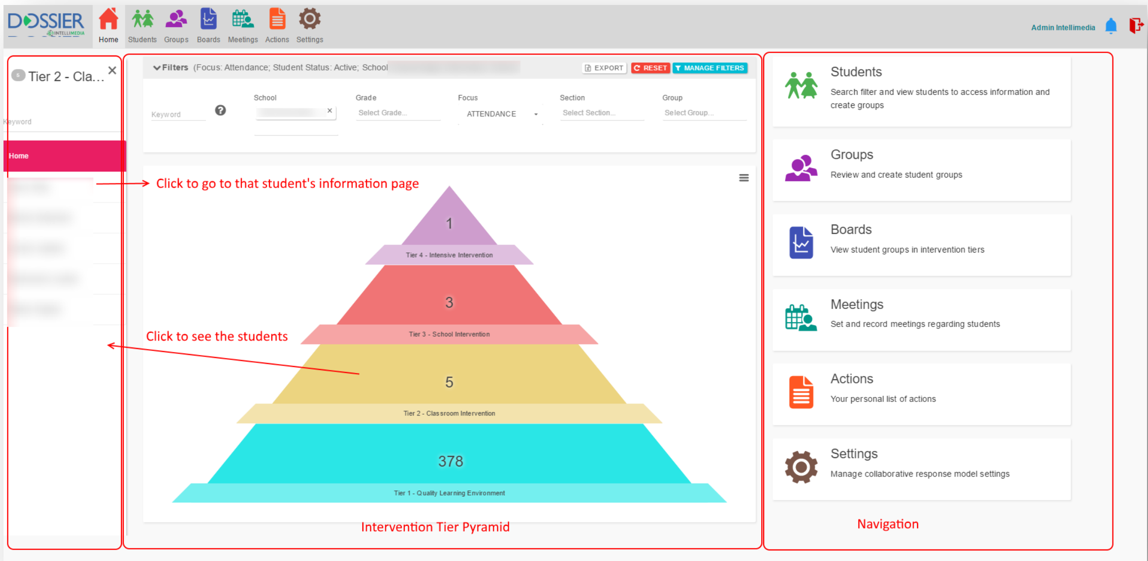


Reviewing Current Data

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

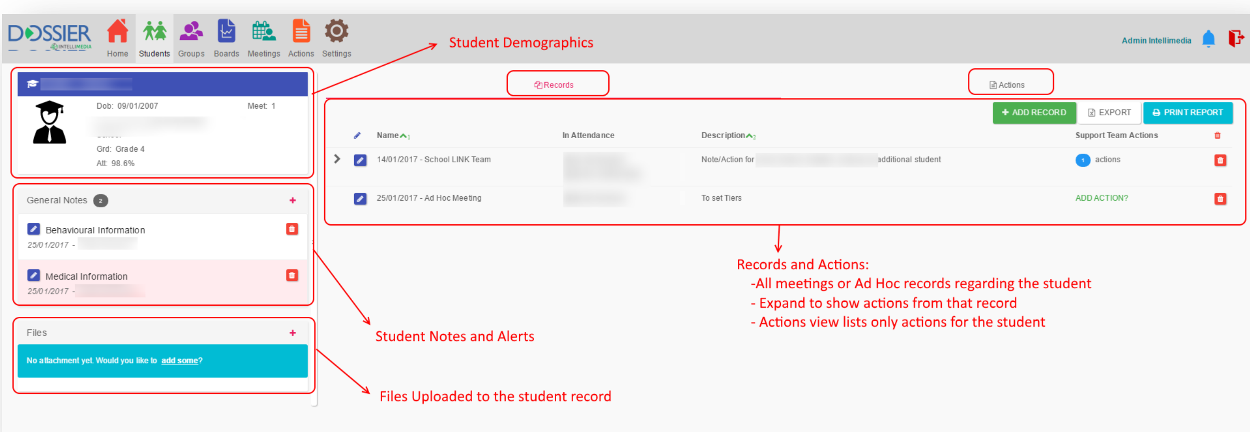
Pyramid shows count of students (filtered) in each of the Tiers for the filtered Intervention Focus



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)

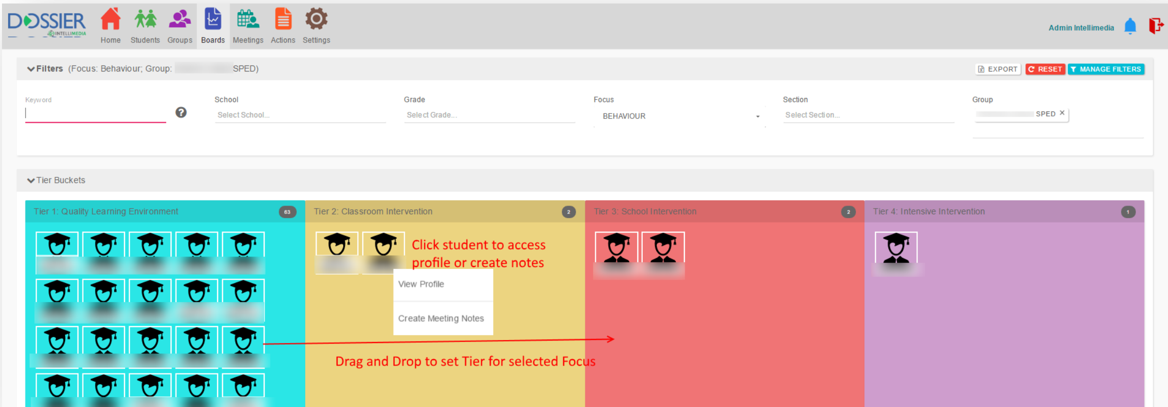
Reviewing Current Data – Students Information Page

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



Reviewing Current Data – Boards

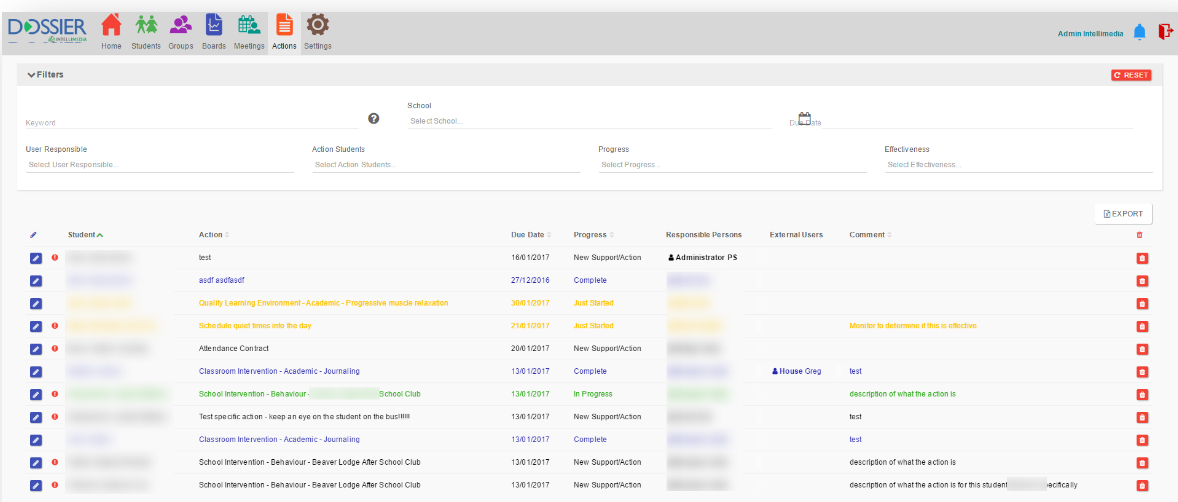
The Boards interface will also be discussed in the creation and process of Meetings. Boards can also be used with a filtered group of students.



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

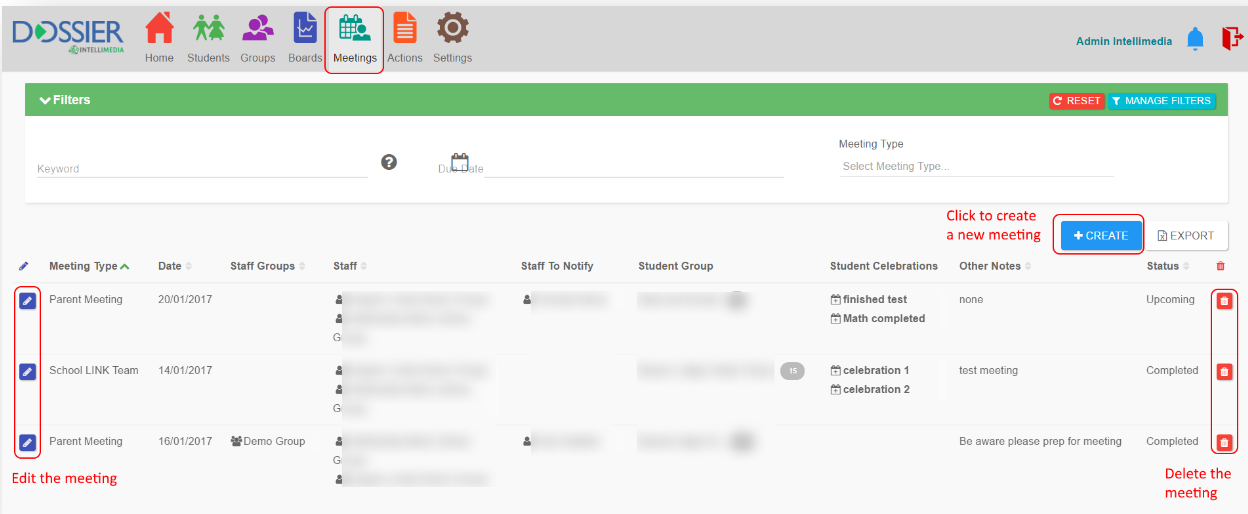


Meeting Process

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

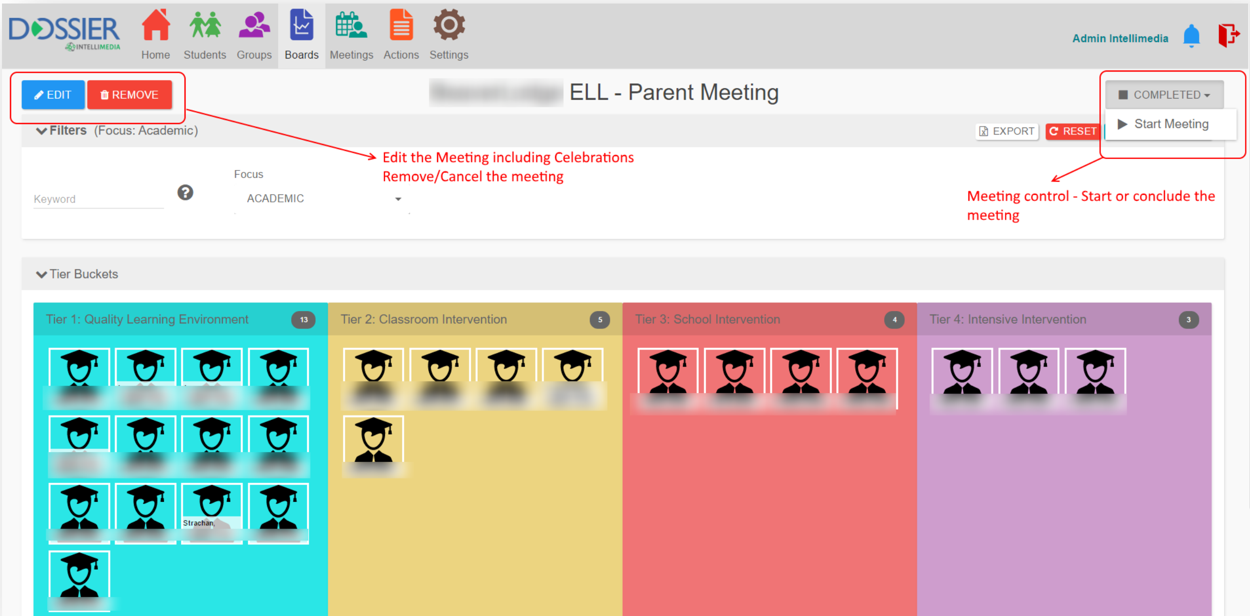
- Set up and scheduling of the Meeting
- Who is involved and for what purpose
- Running the meeting as a record of decisions and actions pertaining to specific students

Meeting Screen



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
INTELLIMEDIA
Home
Students
Groups
Boards
Meetings
Actions
Settings
Admin Intellimedia
EDIT
REMOVE
ELL - Parent Meeting
COMPLETED
Start Meeting
Filters (Focus: Academic)
EXPORT
RESET
Edit the Meeting including Celebrations
Remove/Cancel the meeting
Meeting control - Start or conclude the meeting
Focus
Keyword
ACADEMIC
Tier Buckets
Tier 1: Quality Learning Environment
13
Tier 2: Classroom Intervention
5
Tier 3: School Intervention
4
Tier 4: Intensive Intervention
3
Strachan