

Collaboration Portal

User Reference Guide

During this time of virtual learning and meeting, there is a large need for virtual collaboration. Frontline Education is proud to offer a new Collaboration Portal to make sharing, collaborating and electronically signing documents seamless and consistent for all users, including parents.

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The Big Picture

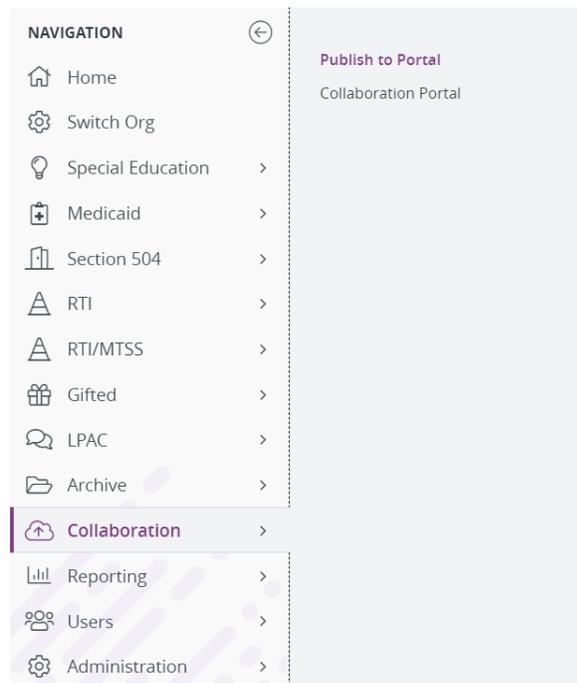
- The Collaboration Portal is for PDF documents to be electronically shared, signed and/or submitted.
- PDF documents generated in the system can be added to the portal via an automated workflow and shared with recipients through a secure link with the added capability to upload a PDF manually.
- Recipients open the document, sign it and submit. The document changes status in the portal and that status is tracked there as well.
- Once submitted, the signed copy can be downloaded and reviewed for record keeping.

Ready to Collaborate!

Follow your usual steps in document creation in the appropriate application. Once a document is completed, create the document.

- From the student record, using the Reports tab, create your report document.
- From the student record, using the Print/Archive tab, create your document.

When you are ready to share a document for signing, begin on the left navigation with **Collaboration > Publish to Portal**.



Choose the student record with documents that need to be signed and shared by clicking on their name then choose your FERPA reason. At this point, you will be taken to the following screen and you can click the dropdown to either publish documents from the “Reports” area OR you can publish documents from Archive.



Screen: **1. Publish Document from Reports** Application: Publish Documents

Select Student

1. Publish Document from Reports

Search 2. Publish Document from Archive

Document Title: Printed After: Printed Before:

First Prev Next Last Reports: 1 - 4 of 4

	REPORT NAME	DATE PRINTED	PRINTED BY EMAIL
	504 Teacher Bundle Report	4/7/20 2:06 PM	ztxeng@esped.com
	504 Plan-Annual	4/7/20 2:08 PM	ztxeng@esped.com
	Medicaid: One-Time Medicaid Consent Form	4/8/20 11:06 AM	ztxeng@esped.com
	rep a	4/12/20 12:53 PM	kdenisov@frontlineed.com

Select the blue arrows icon() in the first column to create the portal document. If you do not see the document you want to share, you can use the search and date tools at the top of this page and hit search.

The next screen is the “Create Collaboration Document” page. Much of the information on this page is prepopulated from the student record.

Create Collaboration Document

Collaboration Document Name

eStar Full ARD G - Placement Services/Committee Signatures: 04/16/2020

The title of the document can be edited and renamed or left as populated.

Recipients

Publish	Name	Email Address	Type
<input checked="" type="checkbox"/>	Fredder 1AlertARD	fredder@esped.com	Parent/Guardian
<input checked="" type="checkbox"/>	Fred Browner	fbrowner@home.com	Parent/Guardian
<input type="button" value="Add Peer"/>	Search for peers with name or email starting with: Enter Search Filter		
<input type="button" value="Add Recipient"/>	<input type="text"/>	<input type="text"/>	

The recipients list is populated with Parent/Guardian names and email addresses. To edit, simply uncheck next to the person you do not want it sent to in the publish column. To add a peer from the list of registered



users begin typing in the search filter box and a dropdown menu will populate with peer email addresses.

Search for peers with name or email starting with:
ca

Add Peer

Add Recipient

Create Unique Access Code

1AL09091926

Message (optional)

You have a document waiting for your perusal. Please utilize the link below and submit the access code. If you are uncertain of the access code, please contact the School Administrator. This link will expire within 48 hours.

By creating and sharing this document, you are certifying that you have provided identifiable information, (i) to the accuracy of the information, and (ii) that the recipient is a student of this district.

Click “Add Peer” and it will add to the recipient list. Use the “Add Recipient” line to manually add name and email addresses for anyone that is not on the list.

If you need to share a document with district staff, administration or teachers, include them using the “Add Peer” function.

Create Unique Access Code

1AL09091926

Message (optional)

You have a document waiting for your perusal. Please utilize the link below and submit the access code. If you are uncertain of the access code, please contact the School Administrator. This link will expire within 48 hours.

The Unique Access Code prepopulates with the first 3 letters of the students last name and their date of birth. This can be changed simply by erasing the prepopulated code, and manually creating one.

Keep in mind that this is the access code parents and/or recipients will type in to gain access to the document, so it should be something that ensures security.

The access code is unique for each document and should not be shared in the message area. However, a “pattern” can be shared in the message area. EX. “Access Code is 1st 3 letters of last name + DOB.”

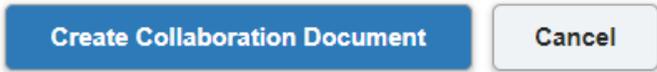
NOTE: Districts will need to communicate the access code with recipients via call, meeting, district communication etc.

The message box also comes prepopulated but can be amended accordingly.

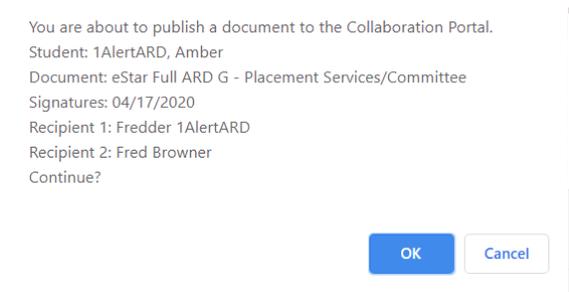


By creating and sharing this document with the student's personally identifiable information, I attest:
(i) to the accuracy and integrity of the document(s); and
(ii) that the recipient email address and access code are correct for this student; and
(iii) that the recipient(s) are, by District records, authorized to view and sign the document.

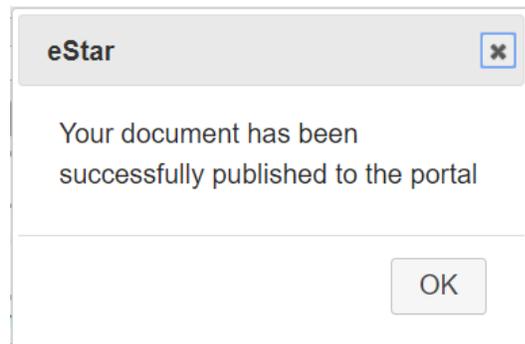
I have reviewed the Acknowledgement and agree to the terms above.



Lastly on this page, in order to complete the creation of the collaboration document, the agreement statement must be checked off. This activates the blue "create collaboration document" button. Click that button to continue. The system will ask you to confirm that you are publishing a document. Click OK.



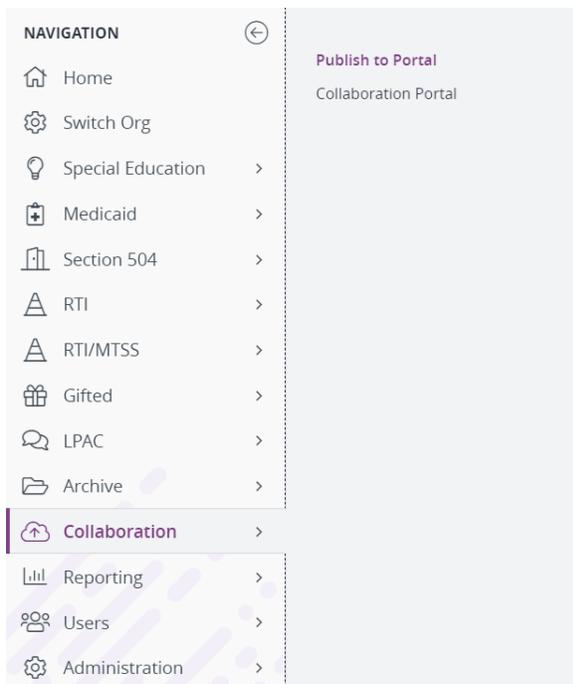
You will then get a completion message.



Managing Published Documents

Once your document has been published, you can check its' status in the “**Collaboration Portal**” area.

To navigate, start from **Collaboration > Collaboration Portal**.



On the next screen, you will either be taken directly to the portal, or you will be offered a blue button to open it in a new window .

Collaboration Portal

A new window will open to the collaboration portal.

If a new window/tab does not open, please [Click Here](#) to open it manually.



You may also access the portal by going from **Collaboration > Publish to Portal**. Enter the student record whose document status you wish to check and click the blue Open Collaboration Portal button.

Previous Next Students 59:48

Screen: 1. Publish Document from Reports Application: Publish to Portal

Open Collaboration Portal

Search Filters: Search View All

Collaboration Portal
Welcome back, Dave!

Find Something Create Collaboration Document

Student	Collaboration Document Name	Created on	Owner	Recipient Status	Document Status
Shawn Crawford	IEP Meeting Agenda	04/03/2020	dmesser@frontlineed.com	5/5 Submitted	Complete
Shawn Crawford	Finalized IEP	04/03/2020	cneedell@frontlineed.com	1/2 Submitted	Incomplete
Angela Davis	LPAC - Permission for Placement	04/03/2020	cneedell@frontlineed.com	0/2 Submitted	Incomplete
Thomas Kam	Prior Written Notice	04/03/2020	scrawford@frontlineed.com	0/2 Submitted	Incomplete
Tory Blathras	IEP (Final)	04/03/2020	dmesser@frontlineed.com	0/2 Submitted	Incomplete

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Once in the portal itself, you will be able to track the status of documents you have sent out for signing, when they were created, as well as document and student information. If all recipients have submitted the document, the status is Complete. You can mark the status complete manually if appropriate.

To download or delete a document from the portal, click on the document name to open it.

Collaboration Document

Amber 1AlertARD - IEP Progress Goals/Objective: 04/16/2020 ●
Incomplete
Created 04/16/2020

100% ▼

- Manage Document Details
- Manage Recipients
- Mark Complete
- Delete
- Download
- Cancel

Xavier District
2323 Johnson Drive
Grand Prairie, TX 79849
1.800.111.1111

Report of Student's Progress
Toward Individual Education Plan Goals/Objectives

Amber 1AlertARD	dts123456	222	Chisolm Trail Elementary	01/01/2000
NAME OF STUDENT	ID#	MEDICAID#	CAMPUS	DATE OF BIRTH

ANNUAL GOAL: By the end of the () semester, Amber will listen attentively to speakers, ask relevant questions, and make pertinent comments .

Evaluator: __ Position: __

Method of Evaluation: Data Collection, Report Cards, Unit Tests, Work Samples **Goal Focus:** English Language Arts and Reading

Frequency: __ OR From 08/22/2016 to 08/31/2016



Once the document is open, you have options for managing the document details and more by navigating to the dropdown menu all the way to the upper left corner.

- **Manage Document Details:** Allows for editing document sharing details including the Access Code.

Manage Document Details

Student Name *

Collaboration Document Name *
This name will be shared in the email notification and displayed in the portal. Do not add Personally Identifiable Information.

Create Unique Access Code *

Message (Optional)

You have a document waiting for your perusal. Please utilize the link below and submit the access code. If you are uncertain of the access code, please contact the School Administrator. This link will expire within 48 hours.

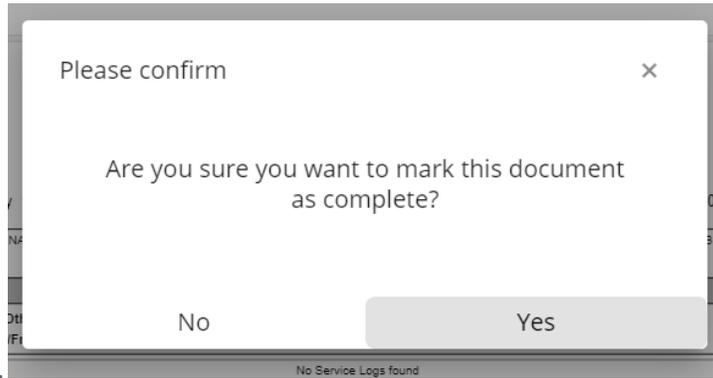
- **Manage Recipients:** If recipients need to be added or removed, that can be done here.

Manage Recipients

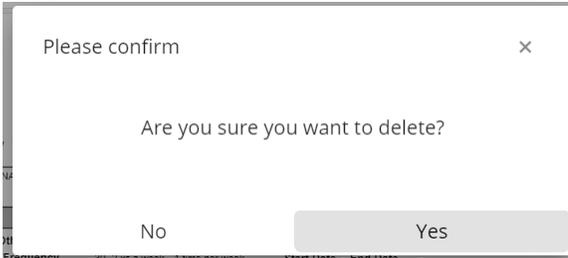
Email	Submission Status	Submitted	Action
dsutedja@frontlineed.com	Not Submitted		Remove
dmesser@frontlineed.com	Not Submitted		Remove

- **Mark Complete:** When multiple recipients are involved, but not all need to sign this can be utilized to move forward in the process





- **Delete:** If the document needs to be deleted, that can be done here.



- **Download:** This allows a download of the document to be completed.

NOTE: After your document is completed, download it to your computer and upload it to Archive Manager.

Uploading Documents Manually

There is an option available to upload/add documents in the collaboration portal that are separate from the Frontline system. Frontline recommends using existing documents whenever possible, as they are all “linked” in the system making record management easier. If there is a need to create an outside document, remember that document will not be linked to pre-existing student records.

To add your own document to the collaboration portal, begin by accessing your portal. Start on the left navigation panel with **Collaboration > Document Tracking**.

Collaboration Portal
Welcome back, Dave!

Find Something Create Collaboration Document

Student	Collaboration Document Name	Created on	Owner	Recipient Status	Document Status
Shawn Crawford	IEP Meeting Agenda	04/03/2020	dmesser@frontlineed.com	5/5 Submitted	Complete
Shawn Crawford	Finalized IEP	04/03/2020	cneedell@frontlineed.com	1/2 Submitted	Incomplete
Angela Davis	LPAC – Permission for Placement	04/03/2020	cneedell@frontlineed.com	0/2 Submitted	Incomplete
Thomas Kam	Prior Written Notice	04/03/2020	scrawford@frontlineed.com	0/2 Submitted	Incomplete
Tory Blathras	IEP (Final)	04/03/2020	dmesser@frontlineed.com	0/2 Submitted	Incomplete

Rows per page: 10 1-10 of 100 < >

Click the blue “Create Collaboration Document” button at the top.



Add Collaboration Document ×

Student Name*

Collaboration Document Name*

This name will be shared in the email notification and displayed in the portal. Do not add Personally Identifiable Information.

Upload Document PDF*

Enter the student name, the name of the document and find and upload the file from your computer. **NOTE: Only PDF files are accepted in the portal.**

Add Collaboration Document

Upload Document PDF*

Add Recipients ×

Email:

Confirm Email:

Add email recipients and click save following each manual entry.

Create Unique Access Code*

Please enter Unique Access Code.

Message (Optional)

Message will be included in the Notification Email. Do not send Personally Identifiable Information or the document access code.

ACKNOWLEDGEMENT
By creating and sharing this document with student personally identifiable information, I attest: (i) to the accuracy and integrity of the document(s); (ii) that the recipient email address and access code are correct for this student; and (iii) that the recipient is, by District records, authorized to view and sign the document(s).

I have reviewed the Acknowledgement and agree to the terms above.



Keep in mind that this is the access code parents and/or recipients will type in to gain access to the document, so it should be something that ensures security.

The access code is unique for each document and should not be shared in the message area. However, a “pattern” can be shared in the message area. EX. “Access Code is 1st 3 letters of last name + DOB.”

NOTE: Districts will need to communicate the access code with recipients via call, meeting, district communication etc.

Add an optional message telling the recipient about the document. You may also indicate the pattern of the access code and what the user needs to do next. Any message that is transmitted goes through email, so avoid sharing PII or security sensitive information.

Once you have acknowledged the statement and agreed with the terms, check the checkbox and note that the “Add Collaboration Document” button activates once it is checked.

Next, click the add collaboration document button.

Student Name	Collaboration Document Name	Created On	Recipient Status	Document Status
Jojo clasp	sped stuff	04/16/2020	0/1 Submitted	Incomplete

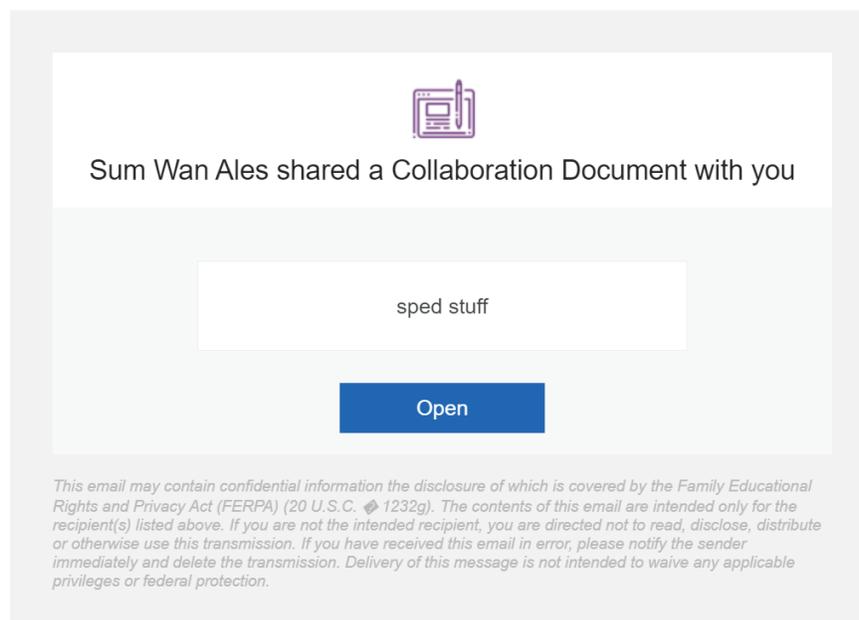
The document is then sent to recipients and gets added to the portal as seen here.

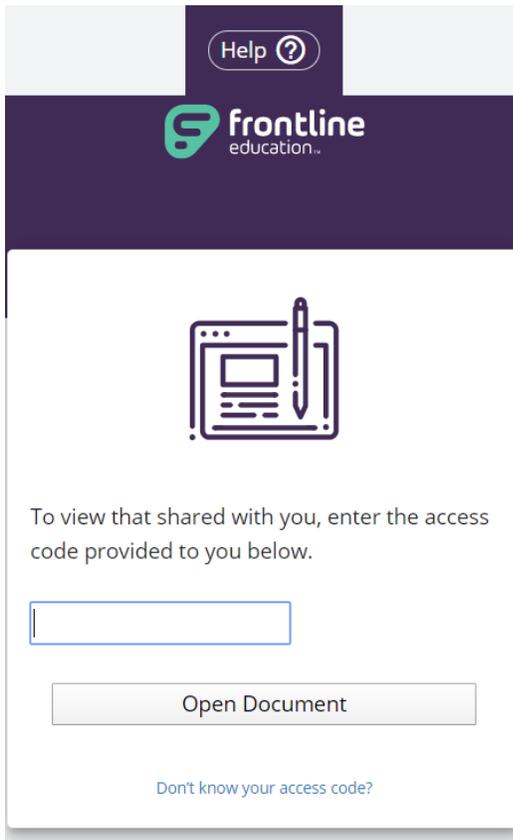


Recipient Signing and Submission

This section covers the process for parents/teachers/recipients that will be getting the document to sign. If you wish to annotate the document yourself, be sure that you are listed as a recipient with your email address provided.

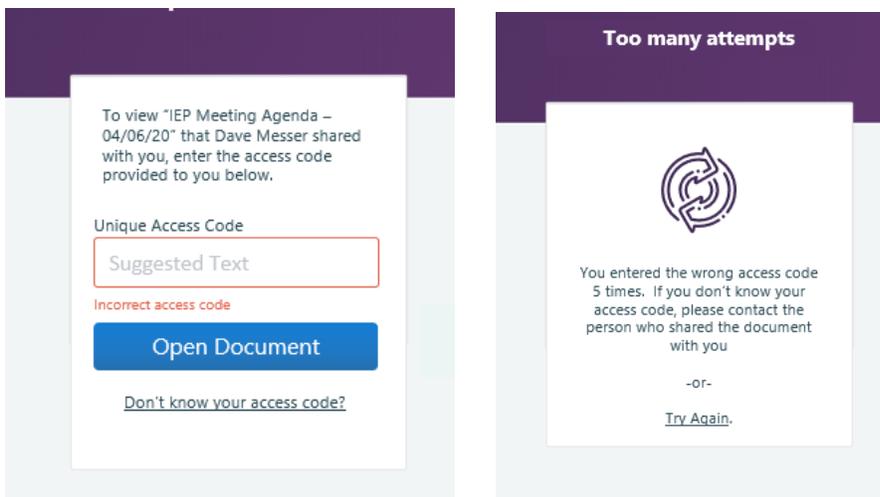
Once a document is sent to recipients there are several steps for completion. All recipients will get an email message. When they click the “open” button they will be prompted to enter the unique access code that was provided by the creator of the document.





Once the access code is entered, click the “Open Document” button. If help is needed at any time, recipients should click the question mark to open an interactive PDF guide with videos and directions. **Recipients will need to contact the creator of the document for assistance with the access code.**

If the wrong access code is entered, an error message appears. Five attempts are permitted before the code must be resent.



Upon opening the document successfully, an embedded short introduction video will play. This will guide the recipient in the signing process, as well as how to utilize the annotation tools.



On that screen, the recipient will then click either the **I Agree** or **I Do Not Agree** button corresponding to the electronic signing process. Only **I Agree** will allow them to move forward in the process.

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.

I do not agree.

I agree

The next step is to click the “Start Signing” button.

Collaboration Document

Tory Blathras – IEP (Final)
Created 04/03/2020
● Not Submitted

Start Signing



Annotation tools are at the top of the screen.



Recipients click on the pen icon, then sign where appropriate just like signing a sheet of paper. The pen tool can also be used to check off areas.



SIGNATURES OF COMMITTEE MEMBERS AND OTHER PARTICIPANTS

Date of Meeting:

Name:	Position:	Signature:	Agree	Disagree
	Parent(s)/Adult Student			
	District Representative			
	General Education Teacher			
	Special Education Teacher/ Provider			
	Assessment			

If a mistake is made, click on the eraser icon to erase where needed. The text icon can be used to create a text box on the document in which the recipient can type their name or other notes as well.

Clicking “Save” will only save the annotations added and allow the recipient to see the signed document. To submit, **save and submit** must be clicked. Upon submission, a message appears that also has a download link for the signed document.

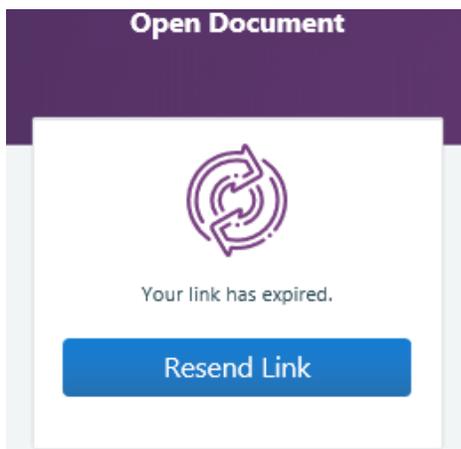
Recipients can utilize the dropdown menu at the top right of the screen to view other recipients and download the document at any time.



NOTE: If Sign and Submit is hit before completion, the document will have to be resent.

Additional Tips

Document links are valid for 48 hours. If that time expires, a message prompting the recipient to have the link resent is utilized.



If a document is deleted in the portal, the link for access will then be terminated. Any attempts to access the deleted link will be met with an error message.

