

## RTIm Direct Updates March 2013

### Update Summary

- New - Creating Meeting Invitations
  - Review of Maintenance Tables for Meeting Invitations
  - Adding Meetings via Meetings Wizard
  - Adding Individual Meetings
  - Meeting Invitation Letters
  - Report - Agenda
  - Additional Fields in Listings

### Creating Meeting Invitations

The ability to create meeting invitations for an individual student or a group of students is now available in RTIm Direct.

### Maintenance

A Meeting Setup section has been added to Maintenance. The Meetings Setup section consists of seven tables containing look-up fields used to create meetings.



Meeting Setup		
→ Meeting Place	→ Meeting or Agreement Reasons	→ Invitation Meeting Comments
→ Invitation Meeting Status	→ Teams	→ Titles
→ Additional Information (Email use Only)		

**Meeting Place:** The Meeting Place table is populated with meeting places used by the district. For districts that have both IEP Direct and RTIm Direct, this table is updated with meeting places from the IEP Direct Meeting Place table. Additional locales may be added; any unnecessary locales may be deleted or hidden.

Meeting Place			Show
<input type="checkbox"/>	<input type="checkbox"/>	Broad Street Elementary Conference Room A	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Broad Street Elementary School Psychologist Office	<input checked="" type="checkbox"/>

**Meeting or Agreement Reason:** The Meeting or Agreement Reason table is populated with meeting reasons used by the district. Progress Review has been added as a built-in choice. Districts may add custom reasons.

Meeting or Agreement Reasons			Show
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Progress Review	<input checked="" type="checkbox"/>

**Invitation Meetings Comments:** The Invitation Meeting Comments table is populated with any pre-defined comments that the district would like to use for a meeting. There are no built-in comments.

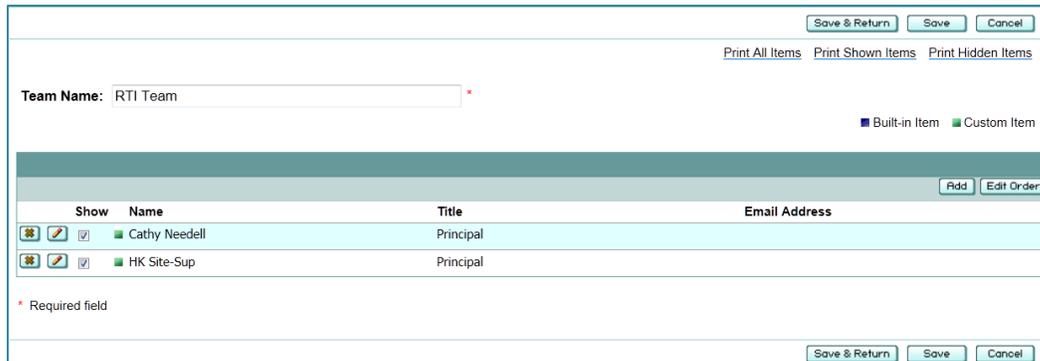
Districts are required to enter a three digit Reference Number (RefNbr) when adding a custom entry.

RefNbr	Invitation Meeting Comments	Show	
<input type="checkbox"/>	<input type="checkbox"/>	101	<input checked="" type="checkbox"/>
	Pre-defined Meeting Invitation comments would be entered here		

**Invitation Meeting Status:** The Invitation Meeting Status table contains meeting status choices. Canceled, Canceled by Parent and Scheduled have been added as built-in choices. Users may enter additional meeting status choices.

Invitation Meeting Status			Show
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Canceled	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Canceled by Parent	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Scheduled	<input checked="" type="checkbox"/>

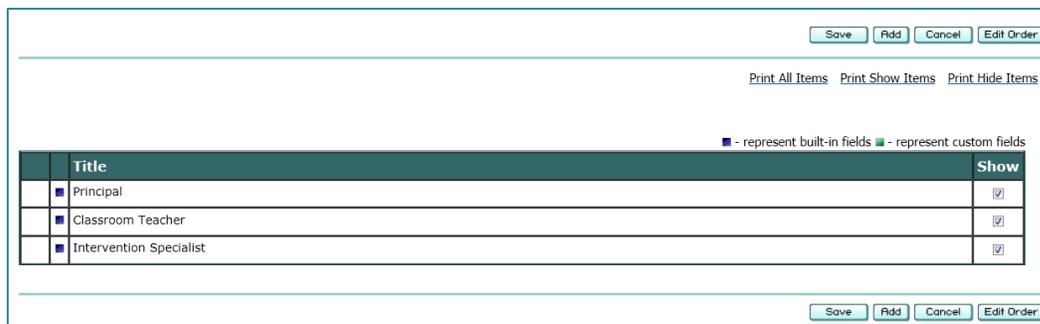
**Teams:** The Teams table allows districts to create and manage teams and their members. When a Team is selected and added to the attendance section of meeting invitations, the names of all members in that team will display.



Team Name: RTI Team \*

Show	Name	Title	Email Address
<input checked="" type="checkbox"/>	Cathy Needell	Principal	
<input checked="" type="checkbox"/>	HK Site-Sup	Principal	

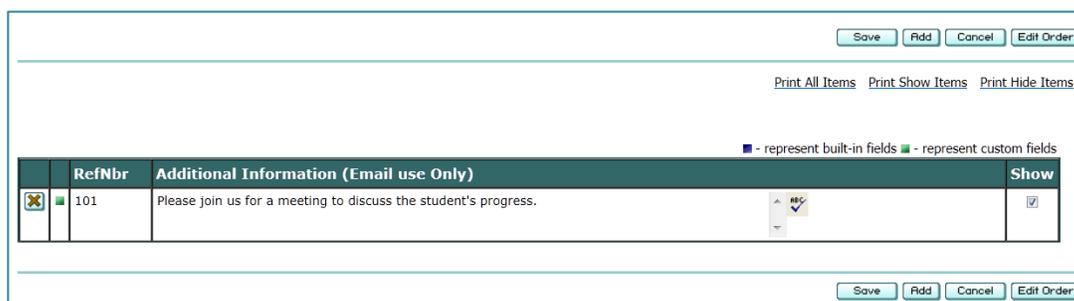
**Titles:** The Titles table allows districts to create and manage titles of team members and other attendees. Built-in choices are Principal, Classroom Teacher and Intervention Specialist.



Title	Show
Principal	<input checked="" type="checkbox"/>
Classroom Teacher	<input checked="" type="checkbox"/>
Intervention Specialist	<input checked="" type="checkbox"/>

**Additional Information (Email use Only):** The Additional Information (Email use Only) table allows districts to create pre-defined text that may be inserted into a Meeting Invitation that is sent via email. There are no built-in values.

Districts will be required to enter a three digit Reference Number (RefNbr) when adding a custom entry.



RefNbr	Additional Information (Email use Only)	Show
101	Please join us for a meeting to discuss the student's progress.	<input checked="" type="checkbox"/>

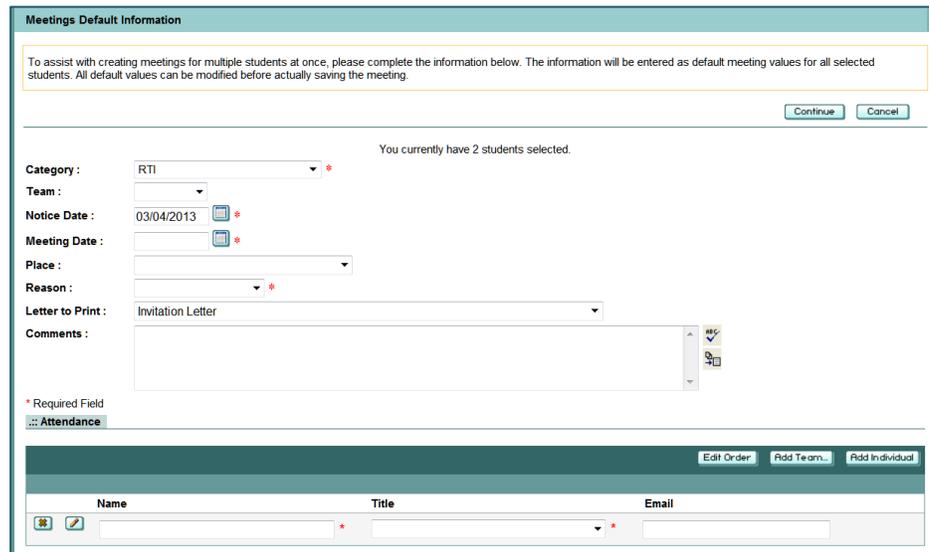
## Meetings Wizard

### Scheduling Meetings in RTIm Direct using the Meetings Wizard

A “Meetings” tab has been added to the My Students page. To schedule a meeting for one or multiple students, select the student(s) for whom the meeting will be scheduled and click the “Meetings” Tab.



The Meetings Default Information screen displays when scheduling a meeting for multiple students. Complete any fields that will be the same for the students selected.



**Category** – The “Category” field is a dropdown that contains “RTI” and “AIS”. The default for Category is “RTI”. The Category dropdown allows the application to determine which category to use for invitation letters. ***If a built-in letter is used, there is no need to change the default.***

**Team** – The “Team” field is a dropdown that pulls from the “Team” lookup table. “Team” is not a required field.

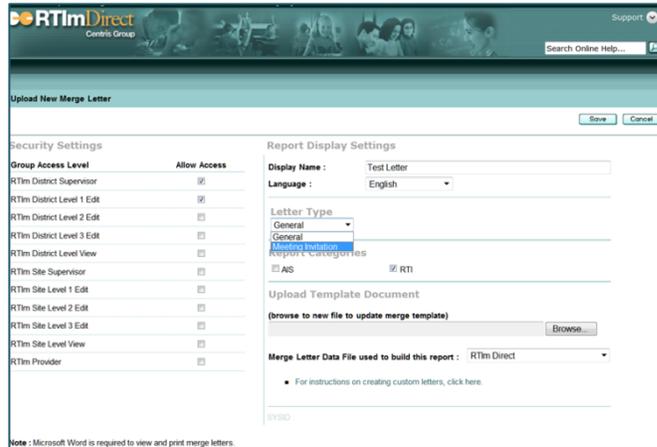
**Notice Date** – The “Notice Date” field is the date the Invitation Letter is generated. The “Notice Date” defaults to the current date

**Meeting Date** –The “Meeting Date” field is a required data entry field for the date of the meeting.

**Place** – The “Place” field is a dropdown that pulls data from the “Meeting Place” lookup table. “Place” is not a required field.

Reason: The “Reason” field is a dropdown that pulls from the “Reason” lookup table and is a required field.

Letter to Print: The “Letter to Print” field is populated with any letter set to Meeting Invitation in the letter’s Report Definition in Maintenance, Manage Letters.



Comments: The “Comments” field is a text box which includes an Insert Paragraph icon. Clicking the Insert Paragraph icon displays entries from the Invitation Meeting Comment table. “Comments” is not a required field.

Attendance: The “Attendance” field is used to add invitees to the meeting. User may sort the order of attendees by clicking the “Edit Order” button. “Attendance” is not a required field.

Add Team – Clicking “Add Team” opens a popup with all of the teams added to the “Teams” lookup table. “Add Team” is not a required field.

Add Individual – Clicking “Add Individual” allows the user to manually add an individual. When an Individual is added, the Name and Title of the Individual are required fields.

Send Email – Clicking the “Send Email” checkbox allows the user to send the meeting invitation via email once the meeting has been saved.

Additional Information (Email use Only): The Additional Information (Email use Only) text box allows users to add additional information relative to the meeting. Entry in this text box is not required.

Clicking “Continue” brings the user to the student(s) individual “Add New Meetings” screen.

**Add New Meetings**

AssessStatistical, Jeffrey

Category: RTI

Team: RTI Team

Notice Date: 03/04/2013

Meeting Date: 04/10/2013

Time: 11:00 AM

Place: BOCES Broad Street

Reason: QA Meeting Reason

Letter to Print: Invitation Letter

Comments: Enter comments here.

\* Required Field

**Attendance**

Edit Order Add Student Add Parents/Guardians... Add Team... Add Individual

Name	Title	Email
John Doe	Principal	

Send Email

The “Add New Meetings” screen contains the same fields as the “Meetings Default Information” screen. Any information entered on the “Meetings Default Information” screen will appear on the “Add New Meetings” screen. The Student’s name will appear in the upper left side of the screen.

In addition, the following fields are available:

**Time** – The “Time” is a required field used to enter the meeting’s start time.

**Attendance:**

- **Add Student** – Clicking “Add Student” adds the student to the list of attendees. “Add Student” is not a required field.
- **Add Parent/Guardians** – Clicking “Add Parent/Guardians” adds the parent/guardians to the list of attendees. “Add Parent/Guardian” is not a required field.

Once the “Add New Meetings” screens for all selected students are completed, the user will be brought to the Summary – New Meetings Invitations screen. Each student is listed separately with a summary of his/her meeting information.

**Summary - New Meeting Invitations**

Anselmo, Dakota

Team	Notice Date	Meeting Date	Time	Place	Reason
RTI Team	03/04/2013	04/10/2013	10:30 AM	BOCES Broad Street	QA Meeting Reason

Category: RTI

Letter to Print: Invitation Letter

Comments: Enter comments here.

**Attendance**

Name	Title	Email
John Doe	Principal	

Send Email: Yes

Additional Information (for email use only): Please join our meeting.

AssessStatistical, Jeffrey

Team	Notice Date	Meeting Date	Time	Place	Reason
RTI Team	03/04/2013	04/10/2013	11:00 AM	BOCES Broad Street	QA Meeting Reason

Category: RTI

Letter to Print: Invitation Letter

Comments: Enter comments here.

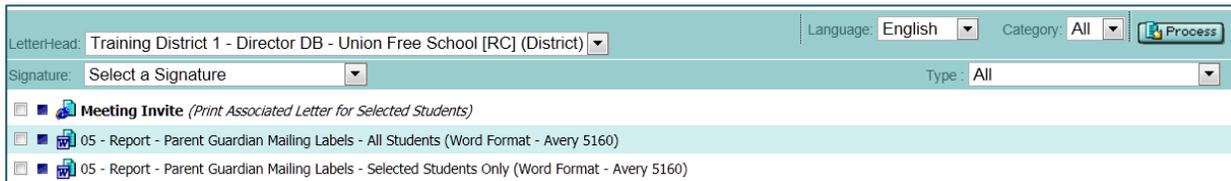
**Attendance**

Name	Title	Email
John Doe	Principal	

Send Email: No

User can click “Previous” to return to an individual student meeting screen to make changes, click “Cancel” to cancel the entire invitation process or click “Save” to save the meeting invitation(s).

Clicking “Save” will send out an “Email” invitation if that option was selected and bring the user to Letters & Reports. The Invitation Letter will automatically be checked. Clicking Process will generate the letter(s).



If the Invitation Letter is not needed, users can click the My Students tab to be brought back to the “My Students” page.

## Scheduled Tasks

### Scheduling Meeting from Student Details Screen

To schedule a meeting from the Student Details screen, hover over “Schedule Tasks” and click “Meeting Invitations”.



Clicking “Meeting Invitations” brings the user to the “Edit Meeting Invitation” screen. The “Edit Meeting Invitation” screen contains a history of all the student’s scheduled meetings and also allows the user to schedule a new meeting.

Interventions | Schedule Tasks

AssessStatistical, Jeffrey Test

Edit Meeting Invitations

[+] Show Details Add

	Team	Meeting Date	Time	Place	Reason	Status
   	RTI Team	04/10/2013	11:00 AM	BOCES Broad Street	QA Meeting Reason	Scheduled
   	Team QA	03/01/2013	11:30 AM	BOCES Southern Adirondack Center	QA Meeting Reason	Scheduled
   	RTI Team	02/12/2013	12:10 PM	MCS - Conference Room	Progress Review	Scheduled

To schedule a meeting, click the “Add” button. Clicking the “Add” button brings the user to the “Edit Meeting Invitation” screen.

AssessStatistical, Jeffrey Test

Save & Print Save & Return Save Cancel

Category: RTI

Team: RTI Team

Notice Date: 03/04/2013

Meeting Date:

Time:

Place:

Reason:

Letter to Print: Invitation Letter

Status: Scheduled

Comments:

\* Required Field

Attendance

Edit Order Add Student Add Parents/Guardians... Add Team... Add Individual

Name	Title	Email

Send Email

For a description of each field, please review the field descriptions on the previous pages.

Clicking “Save” will automatically send out an “Email” invitation if that option was selected and bring the user to Letters & Reports. The Invitation Letter will automatically be checked. Clicking Process will generate the letter.

If the Invitation Letter is not needed, users can click the My Students tab to return to the “My Students” page or the Student tab to return to the specific student’s Student Details screen.

## Meeting Invitation Letter

A new letter, Meeting Invitation Letter, has been created so the user can send out an invitation to the meeting.

In addition, the following merge fields have been added to the RTIm Direct Merge Letter Data File so that users can create custom letters:

- Notice Date
- Meeting Date
- Meeting Time
- Meeting Location
- Meeting Reason

## Report – Agenda

Generating Report – Agenda will provide the user with a list of scheduled meetings for a specified date range.

## Listings

The following fields have been added to listings:

- Invitation Notice Date
- Invitation Meeting Date
- Invitation Meeting Time
- Invitation Meeting Place
- Invitation Meeting Reason
- Invitation Meeting Status
- Invitation Meeting Comments
- Invitation Meeting Invitee
- Invitation Meeting Title
- Invitation Meeting Email