

Initial Distribution: RTIm Direct District Supervisor Release Date: March 13, 2013 Please distribute to other Users as needed.

# 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.



		Save Add Cancel Edit Order
		Print All Items Print Show Items Print Hide Items
		- represent built-in fields - represent custom fields
	Meeting Place	Show
×	Broad Street Elementary Conference Room A	V
×	Broad Street Elementary School Psychologist Office	V
		Save Rdd Cancel Edit Order

**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.

	Save Add Cancel Edit Order
	Print All Items Print Show Items Print Hide Items
Meeting or Agreement Reasons	- represent built-in fields - represent custom fields
Progress Review	
	Save Add Cancel Edit Order

**Invitation Meetings Comments**: The Invitation Meeting Comments table is populated with any predefined 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.

			Save Add Cano	el Edit Order
			Print All Items Print Show Items	Print Hide Items
			- represent built-in fields - represent of	custom fields
	RefNbr	Invitation Meeting Comments		Show
×	101	Pre-defined Meeting Invitation comments would be entered here	*	V
			Save Add Cano	el Edit Order

**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.

		Save Rdd Cancel Edit Order
		Print All Items Print Show Items Print Hide Items
	1	🔳 - represent built-in fields 🔳 - represent custom fields
	Invitation Meeting Status	Show
•	Canceled	V
•	Canceled by Parent	
•	Scheduled	
		Save Rdd Cancel Edit Order



**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.

			Save & Return Save Cancel
			Print All Items Print Shown Items Print Hidden Items
Team Name:	RTI Team	*	
			Built-in item Custom item
			Bdd ) Edit Order
Show	Name	Title	Email Address
🗱 🖉 🔽	Cathy Needell	Principal	
🛎 🖉 🔽	HK Site-Sup	Principal	
* Required field			
			Save & Return Save Cancel

**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.

		Save Rdd Can	cel Edit Ord	ler
		Print All Items Print Show Items	Print Hide Iter	ns
_		- represent built-in fields - represent	t custom fields	
		Title	Show	
	•	Principal	<b>V</b>	
	•	Classroom Teacher	<b>V</b>	
		Intervention Specialist	<b>V</b>	
		Save Ridd Can	cel Edit Ord	ler

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.

				Save Add Cance	el Edit Order
				Print All Items Print Show Items	rint Hide Items
				represent built-in fields - represent c	ustom fields
		RefNbr	Additional Information (Email use Only)		Show
×	-	101	Please join us for a meeting to discuss the student's progress.	* <b>**</b>	
				Save Add Canc	el Edit Order



### **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.

New Student Filters Mass Dat Initial System Filter Filter : With Interventions: (Active, Pending, 201 Providers, All Intervention Names, All Tiers, All	ta Entry Meetings	Matrix 2 Selected	View Selected Clear Selected	Last Name Or ID#
Select All / Deselect All				📧 < 1 2 🍛 👀
🗹 🛢 🛢 🛛 Anselmo, Dakota		AssessStatistical, Jeffrey	🗖 🛢 🛢 Charbo	nneau, Jordan

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.

Meetings Default Ir	ormation
To assist with creating students. All default v	meetings for multiple students at once, please complete the information below. The information will be entered as default meeting values for all selected lues can be modified before actually saving the meeting.
	Continue Cancel
	You currently have 2 students selected.
Category :	RTI 🔹 *
Team :	•
Notice Date :	03/04/2013 🔲 *
Meeting Date :	
Place :	<b>•</b>
Reason :	*
Letter to Print :	Invitation Letter 🔹
Comments :	
	9 <mark>0</mark>
	Y
* Required Field	
	Edit Order Add Team Rdd Individual
Name	Title Email
	*

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.

RTImDirect	( - J			Support 😒
Centris Group			Self Sta	Search Online Help
Upload New Merge Letter				
				Save Cancel
Security Settings		Report Display	/ Settings	
Group Access Level	Allow Access	Display Name :	Test Letter	
RTIm District Supervisor	×	Language :	English •	
RTIm District Level 1 Edit				
RTIm District Level 2 Edit	8	Letter Type	-	
RTIm District Level 3 Edit		General		
RTIm District Level View		Meeting Invitation	mes	
RTIm Site Supervisor	8	AIS .	🗷 RTI	
RTIm Site Level 1 Edit		Upload Templ	ate Document	
RTIm Site Level 2 Edit		oproud rempr		
RTIm Site Level 3 Edit		(browse to new file	to update merge template)	Browse
RTIm Site Level View				
RTIm Provider		Merge Letter Data	File used to build this report : RTIm Dir	rect ·
		<ul> <li>For instruction</li> </ul>	ns on creating custom letters, click here.	
Note : Microsoft Word is required to vi	iew and print merge 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								
						(«P	revious Next	>> Cancel
AssessStatistical, Jeffrey								
Category :	RTI		<b>*</b> *					
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.		× 95					
			*					
			- 90					
* Required Field								
.:: Attendance								
				Edit Order	Add Student	Add Parents/Guardians.	Rdd Team.	Add Individual
Name		Title			Email			
🗱 🖉 John Doe	*	Principal	•					
Send Email								
						< Pr	revious Next	» Cancel

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.

	14.47					
imary - New Meeting In	ivitations					
						« Previous Save Canor
selmo. Dakota						
	Notice	Meeting				
Team	Date	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	Princ	ipal				
Sond Email	Vec					
Joing Linga	165					
Additional Information (	(for email use only):					
Additional Information ( Please join our meeting	(for email use only): J.					
Additional Information ( Please join our meeting	(for email use only): p.					
Additional Information ( Please join our meeting sessStatistical, Jeffrey	(for email use only): ).					
Additional Information ( Please join our meeting sessStatistical, Jeffrey	(for email use only): ). / Notice	Meeting		Need	P	
Additional Information ( Please join our meeting sessStatistical, Jeffrey Team	(for email use only): , Notice Date	Meeting Date	Time	Place	Reason	
Additional Information ( Please join our meeting sess Statistical, Jeffrey Team	(for email use only): ;. // Notice Date 03/04/2013	Meeting Date 04/10/2013	Time 11:00 AM	Place BOCES Broad Street	Reason QA Meeting Reason	
Additional Information ( Please join our meeting assesstatistical, Jeffrey feam RTI Team Category:	(for email use only): , Notice Date 03/04/2013 RTI	Meeting Date 04/10/2013	Time 11:00 AM	Place BOCES Broad Street	Reason QA Meeting Reason	
Additional Information ( Additional Information ( Please join our meeting sess Statistical, Jeffrey Team RTI Team Category: Letter to Print:	(for email use only): 	Meeting Date 04/10/2013	<b>Time</b> 11:00 AM	Place BOCES Broad Street	Reason QA Meeting Reason	
Additional Information ( Please join our meeting sess Statistical, Jeffrey Team RTI Team Category: Letter to Print: Comments:	(for email use only): , Notice Date 03/04/2013 RTI Invitation Letter Enter comments here.	Meeting Date 04/10/2013	Time 11:00 AM	Place BOCES Broad Street	Reason QA Meeting Reason	
Additional Information ( Please join our meeting sess Statistical, Jeffrey Team RTI Team Category: Letter to Print: Comments:	(for email use only): , Notice Date 03/04/2013 RTI Invitation Letter Enter comments here.	Meeting Date 04/10/2013	<b>Time</b> 11:00 AM	Place BOCES Broad Street	Reason GA Meeting Reason	
Additional Information ( Please join our meeting seess Statistical, Jeffrey Team RTI Team Category: Letter to Print: Comments: Attendance	Tor email use only): Core mail use only): Notice Date 0304/2013 RTI Invitation Letter Enter comments here.	Meeting Date 04/10/2013	Time 11:00 AM	Place BOCES Broad Street	Reason QA Meeting Reason	
Additional Information ( Please join our meeting sess Statistical, Jeffroy Team RTI Team Category: Letter to Print: Comments: Attendance Name	(for email us only): ) Notice Date 0304/2013 RTI Invitation Letter Enter comments here. Ttible	Meeting Date 04/10/2013	<b>Time</b> 11:00 AM	Place BOCES Broad Street Email	Reason GA Meeting Reason	
Additional Information   Please join our meeting sessStatistical Jeffrey Team RTI Team Category: Letter to Print: Comments: Attendance Name John Doe	(for email us only): , Notice Date Date Ca304/2013 RTI Invitation Letter Enter comments here. Title Print	Meeting Date 04/10/2013	Time 11:00 AM	Place BOCES Broad Street Email	Reason OA Meeting Reason	
Additional Information ( Please join our meeting peess Statistical, Jeffrey Team RTI Team Category: Letter to Print: Comments: Attendance Name John Doe	tor email us only: Notice Date 03/04/2013 RTI Invitation Letter Enter comments here. Title Princ	Meeting Date 04/10/2013	Time 11:00 AM	Place BOCES Broad Street Email	Reason QA Meeting Reason	
Additional Information ( Please join our meeting esessitatistical, Joffrog Rin Team Rin Team Zategory: etter to Print Jomments: <u>Attendance</u> <b>dame</b> John Doe Send Email	tor email use only: to email use only: b Notice 0304/2013 RTI Invitation Letter Enter comments here. Title Princ No	Meeting Date 04/10/2013	Time 11:00 AM	Place BOCES Broad Street Email	Reason OA Meeting Reason	



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).

LetterHead: Training District 1 - Director DB - Union Free School [RC] (District) 💌	Language: English 💌 Category: All 💌	Process
Signature: Select a Signature	Type : All	-
🔲 🔳 🚜 Meeting Invite (Print Associated Letter for Selected Students)		
🔲 🔳 🚮 05 - Report - Parent Guardian Mailing Labels - All Students (Word Format - Avery 5160)		
🔲 🔳 📸 05 - Report - Parent Guardian Mailing Labels - Selected Students Only (Word Format - Avery 5160)		

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".

	Direct			0 4 0	More Products 😒 🛛 Support 😒
		M.S.	And MAN	SS 2 LUN	Search Online Help
My Students • S	Student • Messaging • Le	tters & Reports	• Listings • Maintenance		
Interventions	Schedule Tasks				
Student Details	Meeting Invitations 2012-2013* -				Last Name Or ID#
	Meeting Results				
:: Student Info	Nation				Edit
Last Name:	Pisces	First Name:	Jeffrey	Middle Name:	Ely
Gen Ed ID#:	JPE200415	Alt ID#:		Gender:	Male
Date of Birth:	2/15/2004	Age:	9 Yrs. 1 Mos.	Social Security #:	
Ethnicity:	Non-Hispanic or Non-Latino	Native Language:	Spanish	Grade:	3
Race:	White				
Designated LEP:	No	Translator:	No		
Classroom Teacher	:	Cohort Year:			
Provider:					
Site:					

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.

<b>-</b> RTI	Centris Grou	t™ ıp™				
Interventions • 5 Edit Meeting Invitation	Schedule Tasks				AssessStatistica	, Jeffrey Test ?
[+] Show Details	Toom	Monting Data	Time	Piace	Bascan	Add
* 2 🗃 🖻	I eam	04/10/2013	11:00 AM	BOCES Broad Street	QA Meeting Reason	Scheduled
* / @ 2	] 🔮 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.

Edit Meeting Invit	ation	Assess Statistical, Jeffrey Test 🔹 👔
		Save & Print   Save & Return   Save   Cancel
Category :	RTI 👻 *	
Team :	•	
Notice Date :	03/04/2013 🔲 *	
Meeting Date :	•	
Time :	*	
Place :	*	
Reason :	*	
Letter to Print :	Invitation Letter	-
Status :	Scheduled -	
Comments :		^ <del>*</del>
* Required Field		
.:: Attendance		
		Edit Order Add Student Add Parents/Guardians. Add Team. Add Individual
Na	ame 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