



Sending Documents for Review via the Frontline Collaboration Portal

You can send a document for the desired recipients to review via the Frontline Collaboration Portal. Recipients can then annotate and/or sign the document as necessary.

- 1 On the document overview version of the **Student Documents** screen, click **Complete**.

Moore, Austin Example High School ID: xxxxxx Grade: 11 Case Mgr: Smiles, Mary Homeroom: Bronson, Richard

2018-2019 RETR > ! Mark as Priority View DCF Print Preview + Add Additional **1** Complete Delete

Due: 03/29/2019 Created By: Smiles, Mary

Evaluation Team Report Overview 100%

| | |
|--|-------------|
| Cover Page | ✓ Completed |
| 1. Individual Evaluator's Assessment 1 Assessment | ✓ Completed |
| 2. Team Summary | ✓ Completed |
| ✗ 3. Specific Learning Disability | ✓ Completed |
| 4. Eligibility | ✓ Completed |

- 2 On the **Send for Review** window that opens, click **Continue to Review**.

Send for Review X

Sending this document for review lets recipients sign and annotate it via the Frontline Collaboration Portal.

Note: This document cannot be edited or deleted while it is being reviewed.

✓ Comp **2** Continue to Review >

- 3 (Optional) In the **Collaboration Document Name** field, enter a name for the document. (The name of the document in SpecialServices displays by default.) This name is used as the display name in the portal.
- 4 In the **Recipients** area, enter the **First Name**, **Last Name**, and **Email Address** of the desired recipient in the appropriate fields.
- 5 Click **Add Recipient**.

Send for Review X

Collaboration Document Name

3 2018-2019 ETR
This name is used as the display name in the portal.


Recipients

4 Carrie Moore
cmoore@gmail.com

5 Add Recipient

**see reverse side for more information*

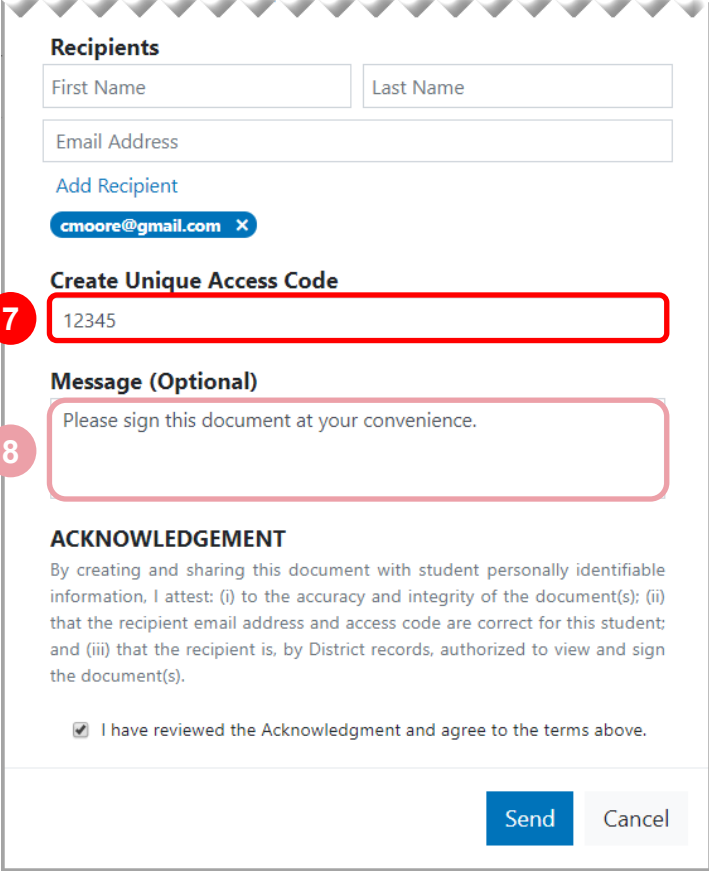
The email address of the newly added recipient displays below the fields.

Note: To remove the recipient, click .

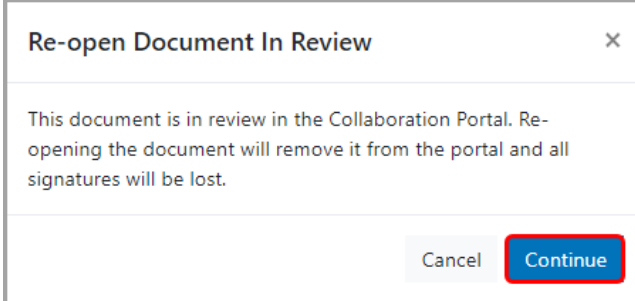
- 6 (Optional) Repeat steps 4 and 5 as necessary.
- 7 In the **Create Unique Access Code** field, enter an access code with at least 4 characters.
- 8 (Optional) If you want to include a message in the notification email that will be sent to the recipient(s), in the **Message (Optional)** field, enter a message.
- 9 Select the **I have reviewed the Acknowledgement and agree to the terms above** checkbox.
- 10 Click **Send**.

The document is sent to the Frontline Collaboration Portal, and the document **Status** changes from **Open** to **In Review** in SpecialServices.

Note: You can reopen a document that has been sent to the portal if necessary. On the overview version of the **Student Documents** screen, click **In Review**. On the **Re-open Document in Review** window that opens, click **Continue**.




The screenshot shows a form for adding recipients and creating a unique access code. It includes fields for First Name, Last Name, and Email Address. A recipient 'cmoore@gmail.com' is listed. The 'Create Unique Access Code' field contains '12345'. The 'Message (Optional)' field contains 'Please sign this document at your convenience.' Below this is an 'ACKNOWLEDGEMENT' section with a checkbox for 'I have reviewed the Acknowledgment and agree to the terms above.' At the bottom right are 'Send' and 'Cancel' buttons.



The dialog box has a title bar 'Re-open Document In Review' with a close button. The main text reads: 'This document is in review in the Collaboration Portal. Re-opening the document will remove it from the portal and all signatures will be lost.' At the bottom are 'Cancel' and 'Continue' buttons.

The document is reopened, and its **Status** changes from **In Review** to **Open**.

Note: If you have the appropriate security privileges, you can access the Frontline Collaboration Portal directly from SpecialServices. On any screen, click  to expand the left navigation menu. Then, click **Collaboration Portal**. The portal opens in a new tab.

Note: For more information on the Frontline Collaboration Portal, see the [Collaboration Portal User Guide](#).