



# Uploading Documents Related to Referral, Assessment, IEP, or Placement

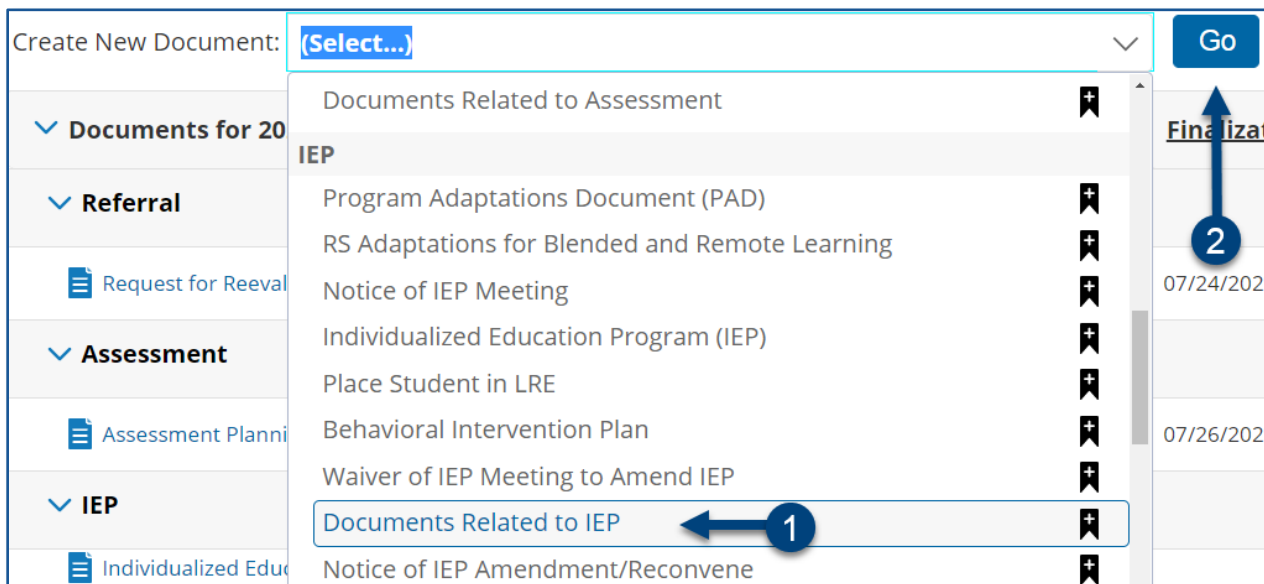
## Introduction

This training guide provides instructions for uploading documents related to Referral, Assessment, IEP, or Placement in SESIS, when applicable. Uploading will transfer the document file from your computer directly to the SESIS document template and appear as an attachment.

**Note:** This is only to be used in certain circumstances when directed to upload documents related to a process in SESIS and does not replace faxing/scanning. In this guide, *Documents Related to IEP* will be shown as an example.

1. From the student's *Documents* section in SESIS, click the **Create New Document** dropdown menu, and select **Documents Related to IEP** under the IEP section.
2. Click **Go**.

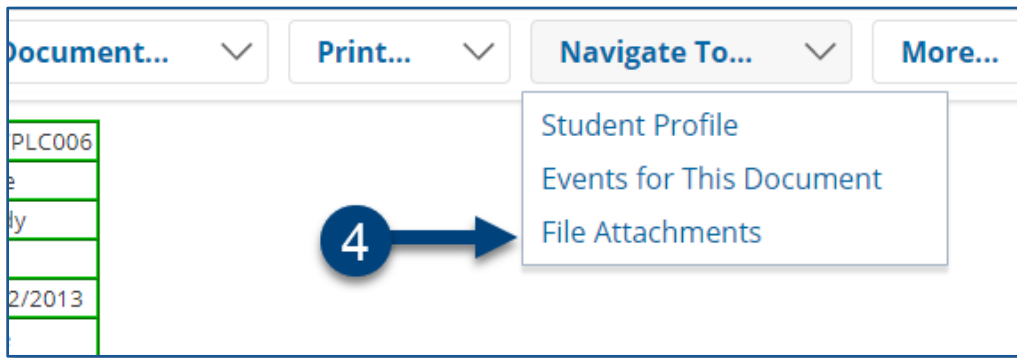
**Note:** If uploading a document related to another process in SESIS, find the *Documents Related to...* option in the dropdown menu under the corresponding process.



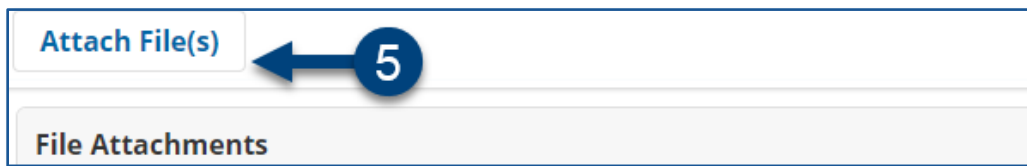
3. Add a *Label/Comment* if appropriate. Click **New**.



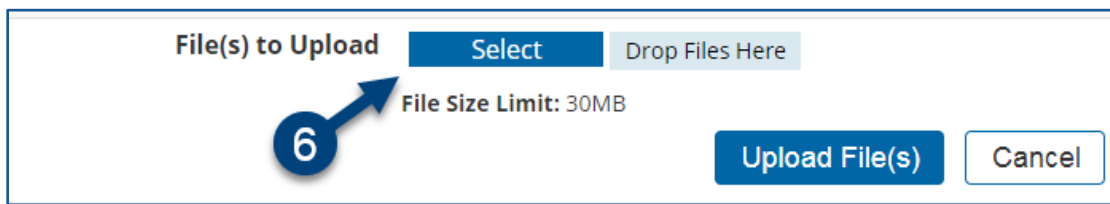
4. From the *Navigate To* dropdown menu, select **File Attachments**.



5. Click **Attach Files**.



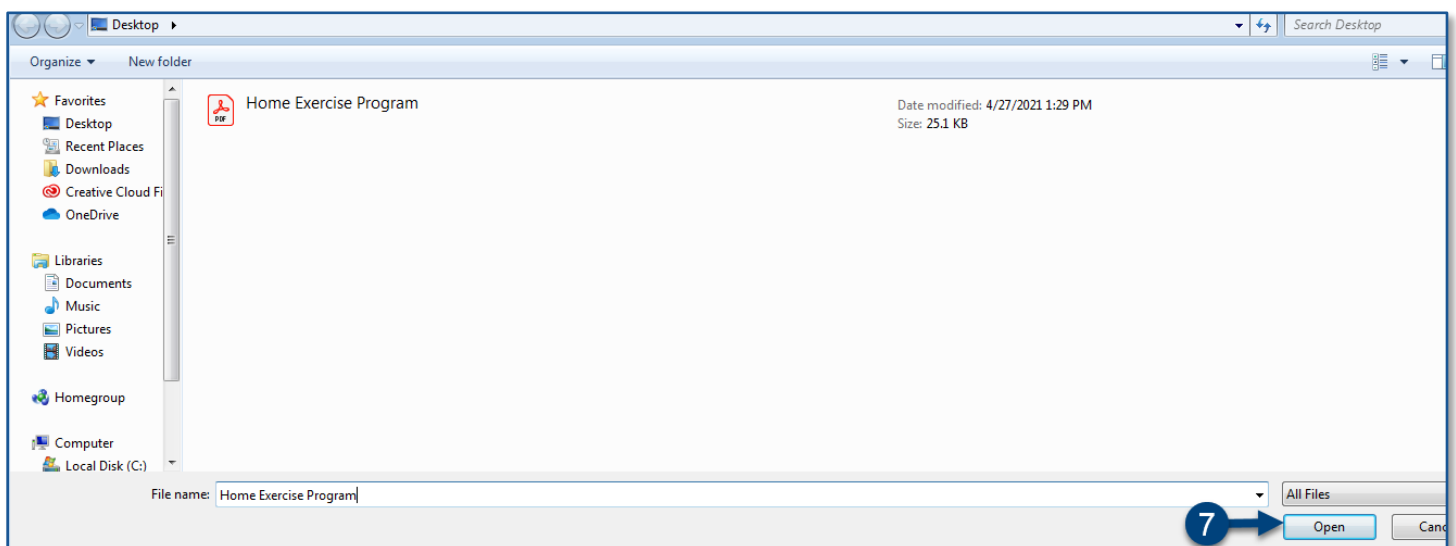
6. Click **Select** to choose the document from your computer.



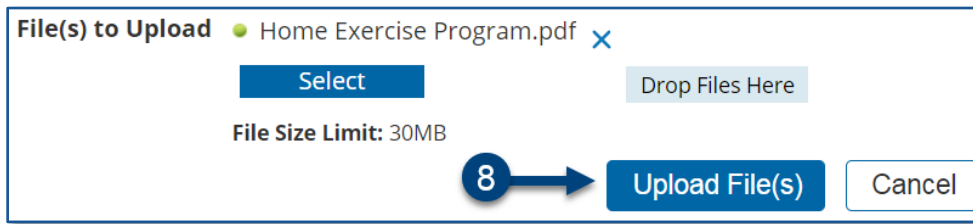
**Note:** You can also upload a file by dragging it from your desktop into the *Drop Files Here* option.

7. Locate and select the document file to be uploaded from your computer. Click **Open**.

**Note:** It is best to practice uploading as a PDF file.

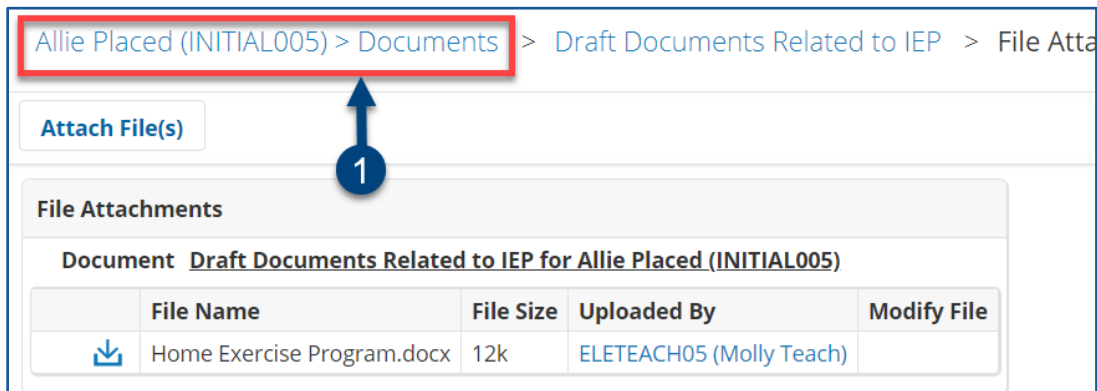


8. Click **Upload Files(s)**.



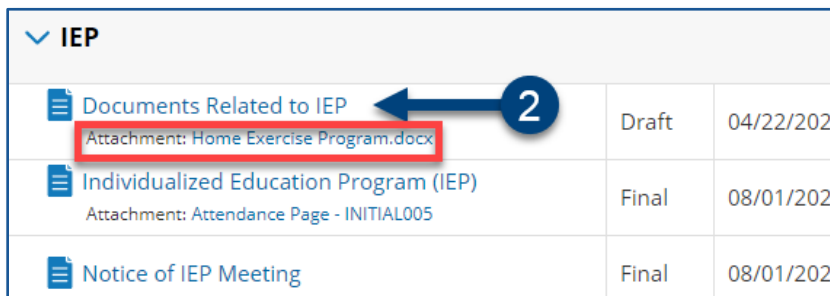
## Finalizing the Document

1. Click the student's name in the upper left of your screen to return to the student's documents to verify that the document is attached.

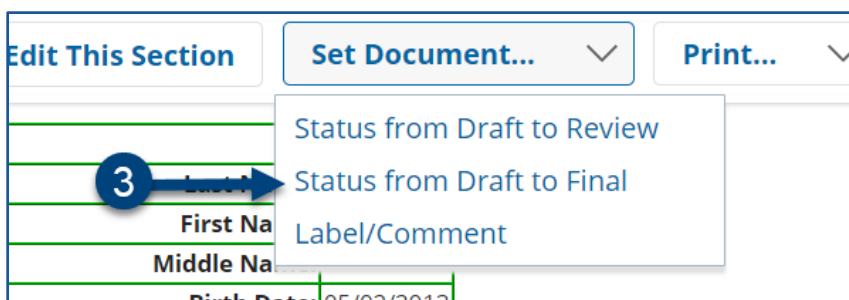


2. Click **Documents Related to IEP** to open the document.

**Note:** If finalizing a different document, click to open. *Documents Related to IEP* is shown as an example.



3. From the *Set Document* dropdown menu, select **Status from Draft to Final**.



4. Click **Accept**.

(optional)

Send a Notification Message To

User IDs: Look up: Staff User ID My Messaging Groups

4 → **Accept** Cancel

5. Click **OK**.

Change status of document to final?

5 → **OK** Cancel

6. The status of the document is now set to *Final*.

IEP

Documents Related to IEP Attachment: Home Exercise Program.docx	Final	04/15/2020
Individualized Education Program (IEP) Attachment: Attendance Page - INITIAL005	Final	08/01/2020
Notice of IEP Meeting	Final	08/01/2020