



Uploading Related Service Phone/Tele-therapy Documents

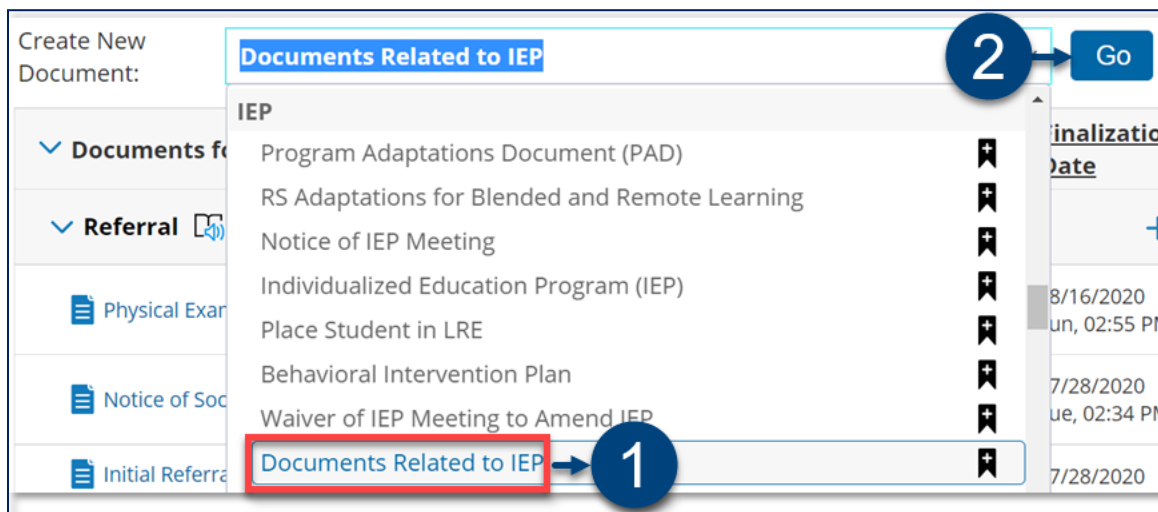
Introduction

This training guide provides instructions for uploading Related Service (RS) Phone/Tele-therapy documents into the SESIS Application as *Documents Related to IEP*.

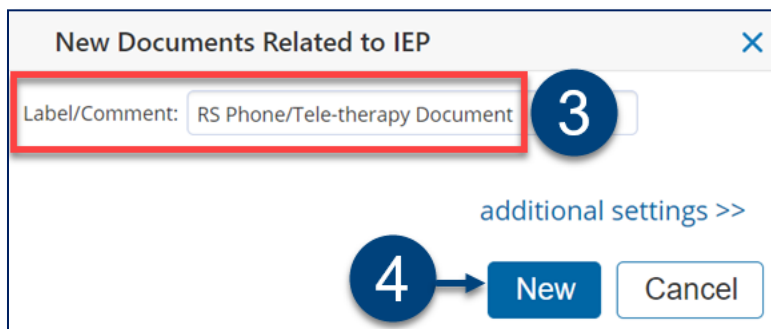
Uploading will transfer the document file from your computer directly to the SESIS document template and appear as an attachment.

Creating Documents Related to IEP

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



3. Enter **RS Phone/Tele-therapy Document** in the *Label/Comment* field.
4. Click **New**.



5. Click the **Navigate To** dropdown menu.

6. Select **File Attachments**.

The screenshot shows a document management interface. At the top, there is a breadcrumb trail: "My Home Page > Allie Placed (INITIAL004) > Documents > Draft: Documents Related to IEP (RS Phone/Tele-therapy Document, 2020-21)". On the right, there is an "Immersive Reader" button. Below the breadcrumb, there are several action buttons: "Edit This Section", "Set Document...", "Print...", "Navigate To...", and "More...". The "Navigate To..." button is highlighted with a red box and a blue circle with the number 5. A dropdown menu is open below it, showing three options: "Student Profile", "Events for This Document", and "File Attachments". The "File Attachments" option is highlighted with a blue circle and the number 6. On the left side of the interface, there is a table with student information:

ID:	INITIAL004
Last Name:	Placed
First Name:	Allie
Middle Name:	
Birth Date:	05/02/2013
Gender:	Female
Date Test:	
Ext DMSIEPDate Upl:	
Ext DMSIEPDate Received:	

7. Click **Attach Files**.

The screenshot shows a dialog box titled "Attach File(s)". The "Attach File(s)" button is highlighted with a red box and a blue circle with the number 7. Below the button, there is a section titled "File Attachments" with a document name: "Document Draft Documents Related to IEP for Allie Placed (INITIAL004)". Below the document name, it says "No Uploaded Files".

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

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

The screenshot shows a file upload dialog box titled "Attach File(s) to Documents Related to IEP Document for Allie Placed (INITIAL004)". It features a "File(s) to Upload" section with two buttons: "Select" and "Drop Files Here". The "Drop Files Here" button is highlighted with a red box. Below the "Select" button, there is a blue circle with the number 8 and the text "File Size Limit: 30MB". At the bottom of the dialog, there are two buttons: "Upload File(s)" and "Cancel".

Note: Click the **X** icon to delete the file, if needed.

9. Click **Upload File(s)**.

Attach File(s) to Documents Related to IEP Document for Allie Placed (INITIAL004)

File(s) to Upload ● SAMPLE RS Phone Tele-therapy Document.docx **X**

Select Drop Files Here

File Size Limit: 30MB

9 Upload File(s) Cancel

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

Allie Placed (INITIAL004) > Documents > Draft Documents Related to IEP > File Attachments

Attach File(s)

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File Attachments

Document Draft Documents Related to IEP for Allie Placed (INITIAL004)

	File Name	File Size	Uploaded By	Modify File
	SAMPLE RS Phone Tele-therapy Document.docx	12k	ELEPSYCH04 (Mary Psych)	

Note: Click the **Download File** icon to view the file attachment.

11. Verify the file attached successfully, as shown.

IEP

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Documents Related to IEP (RS Phone/Tele-therapy Document)
Attachment: SAMPLE RS Phone Tele-therapy Document.docx

Draft 6/07/2021 Mon, 11:51 AM

Finalizing Documents Related to IEP

1. Click **Set Document**.
2. Click **Status from Draft to Final**.

My Home Page > Allie Placed (INITIAL004) > Documents >
Draft: Documents Related to IEP (RS Phone/Tele-therapy Document, 2020-21)

Edit This Set **1** Set Document... Print... Navigate To... More...

Status from Draft to Review
Status from Draft to Final **2**
Label/Comment

Last Na	
First Na	
Middle Na	
Birth Date:	05/02/2013
Gender:	Female
Date Test:	
Ext DMSIEPDate Up:	
Ext DMSIEPDate Received:	

1. Click **Accept**.

Set Document Status: Documents Related to IEP for Allie Placed (INITIAL004)

Change status from Draft to Final

Comments (optional)

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

Send a Notification Message To

3

Accept Cancel

2. Click **OK**.


Change status of document to final?

4 OK Cancel

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

[My Home Page](#) > [Allie Placed \(INITIAL004\)](#) > [Documents](#) >
Final: Documents Related to IEP (*RS Phone/Tele-therapy Document, 2020-21*)

[Print...](#) ▾ [Navigate To...](#) ▾ [More...](#) ▾

 **Document status set to final.**