

# E-Com User Training

General Session 2: Forms and Batches

## Form/Batch Functionality

- You can do a number of things with forms and batches in E-Com, including printing, printing to PDF, and emailing (if your district allows this).
- You can lock forms and batches in order to ensure that they do not change when the student record changes. Note: This will become increasingly important in the future!
- You can move forms between batches.
- You can duplicate forms and batches between students, or within the same student record.
- You can refresh or change IEP/Evaluation dates and demographic data for an entire batch at once, or for an individual form.

## “Print” Functions

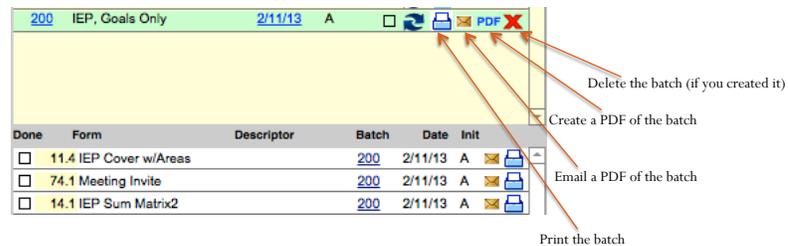
- You may print, email or create PDFs of forms while the form is open, using the options available in the yellow navigation area to the right of every form.
- You may also email or print forms when they are closed, by using the email or print icon next to their names in batch view on the Student screen.



Done	Form	Descriptor	Batch	Date	Init
<input type="checkbox"/>	11.4 IEP Cover w/Areas		200	2/11/13	A
<input type="checkbox"/>	74.1 Meeting Invite		200	2/11/13	A
<input type="checkbox"/>	14.1 IEP Sum Matrix2		200	2/11/13	A

## “Print” Functions cont.

- If you want to print more than one or two forms, you may also print, email or create a PDF of the batch, using the icons in the batch view area.

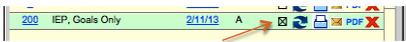


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<input type="checkbox"/>	14.1 IEP Sum Matrix2		200	2/11/13	A

## Locking Forms & Batches

- Both forms and batches may be locked. Generally, they are locked once they are complete.
- Locking forms and batches preserves historical information by stopping data on the locked form or batch from changing when student data changes. Locked batches cannot be refreshed.
- You lock a batch on by clicking the “Lock” checkbox in batch view. Note: Progress reports do NOT lock even if the batch is locked, so you can continue to update them over the course of the IEP term.
- Forms other than progress reports may be locked individually, or as part of the batch.

## Locking, cont.

- Forms may be locked individually, as well.
  - A locked form or a batch will have the “Locked” checkbox checked – visible in batch view for the batch.
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- Locked forms will have a locked checkbox that is visible when you are in the form, but the “Done” checkbox also appears shaded in red when in batch view, so you can easily see that a form is locked without opening it.
- 
- You will not be able to enter data into a locked form.
  - Administrators must unlock locked forms and batches; general users cannot.

## Move a Form to Another Batch

- Highlight the batch that the form you want to move is currently in. The list of forms in that batch will appear in the Form list area.
- Click on the blue Batch number for the form you want to move.
- When the dialog box asks if you would like to transfer the form, select “OK.”
- Enter the number of the batch you want to move the form to and click OK.
- Enter the date of the batch you want to move the form to and click OK.
- The form should appear in the destination batch at the top of the list of forms.
- Forms may only be moved one at a time.

## “Template” Batch

- Available batches in E-Com (those that appear when you click the “Add Batch” button on the student screen) are created and modified by your local E-Com administrator. The admin decides what forms, how many of those forms, and in what order they appear inside each batch.
- However, you can also easily modify and use batches shaped for your needs.
- We suggest, if you are going to create a template batch, that you use your Template Student record to hold that batch.

## “Template” Batch, cont.

- Go to your staff screen and click the “My Template” button. If you have a template student, this will take you to that record. If you do not, you will be asked if you want to create one. Click on Yes.
- Once in the template record (named Sample as first name, and your last name as last name), add the batch you want to modify.
- Add and delete forms as needed. Enter as much boilerplate text as you reasonably can to the forms that need it.
- You now have a template batch. It can be duplicated to student records as needed.

## Duplicate Form/Batch - Same

1. Open a form within the batch you want to duplicate.
2. Click the “Duplicate” button in the yellow nav area to the right.
3. Select either the form alone, or the batch that it is in when asked.
4. A larger dialog box will open, asking whether you want to duplicate to the same student, or a different one.
5. If the same student, click the “Same Student” button, specify which batch (if you’re duplicating a form), and click the Duplicate button to allow the process to complete.
6. You should be taken to the same student record, with the batch that the form was duplicated to highlighted.

## Duplicate Form/Batch - Different

- The steps for duplicating to a different student record are the same as for the same student, up to Step 5.
- Once you select “Different Student”, you will get a search box, where you can enter search terms. Enter at least 3 characters of the student name in the search field.
- Select the student you want from the list. Verify that this is the student that appears in the duplication dialog.
- If you are duplicating a form, select a batch for the form.
- Click the Duplicate button. You will be taken to the student record to which you duplicated the form or the batch.

The screenshot shows a search results window with the following content:

Results	
Click on row to make selection	
mar	
Enter find criteria, then hit enter	
Students	Results 1 to 6 of 6 for: mar
Robert Martello	• 5
Margaret Selph	• 7
Maria Quigley	• 28
Margie Maldonado	• 30
Marty Duncan	• 36
Margaret Turpin	• 46

## Duplicate Form/Batch - Notes

- Currently, you cannot duplicate forms or batches to an inactive student record; they will not be found in a search. This is under review and may change in future.
- Forms that are currently inactive in E-Com will not be duplicated, even if they are in use in the batch you are duplicating.
- Please be sure to verify that the student record you have selected is correct before duplicating.
- It's good policy to check that the batch or form needs to be duplicated before doing so. Sometimes other staff have already done so.

## Editing Batch Dates

- The batch date automatically populates with the date you added the batch to student record. You can edit the batch date on Eval and IEP batches to match the evaluation date or the IEP date, which will cause the forms in the batch, or any forms that you subsequently add to the batch, to have that dates.
- To do so, just find the batch whose date you wish to change. Click in the batch date field, and change the date.
- Remember, it must be an IEP or an Evaluation batch in order for this to work. Your E-Com administrator determines which batches these are.

## Refreshing Forms & Batches

- If demographic data on a student record has changed while a batch is still in progress, the old, incorrect info may still appear on the forms.
- To update this information, you can refresh either the entire batch or the form. (Refreshing the batch is recommended except in rare instances.)
- To refresh the batch, use the blue arrow icon visible in batch view. You will be asked if you want to update the IEP and Evaluation dates, to which you may answer Yes or No.
- To refresh a form, you may select the “Refresh” button in the yellow nav area visible in the open form.
- Text that has been entered manually into a regular text field will not change.

## Descriptor Fields/Batch Names

- Each form has a descriptor field that is visible in batch view.
- In some cases, E-Com will add details to this field automatically (it will say Spanish, for instance, if a form available in Spanish is being used in Spanish rather than English, and goal/objective forms may show the area of service selected).
- For other forms, staff may add their own descriptors, to show whether a progress report covers the 1<sup>st</sup> semester, for instance.
- Batch names may also be changed. Simply click in the batch name field and type what you want the batch name to be.

## Questions – Spanish Forms

- We will cover Spanish forms more in depth in the March webinar, but in the meantime, here's a list of forms available in Spanish:
  - All versions of E-Com currently in use should contain Spanish versions of forms 6, 6.1, 6.2, 7, 8, 74, 74.1, 75, 78, and 79.
  - The next version of E-Com you receive will include Spanish versions of forms 11.2, 12.4, 12.6, 33.5, 36.2, 75 (better translation), 82, and 83, in addition to the ones listed above.