Create Form Link / eSignature Request

Many Pre-Meeting forms such as the Meeting Notice and Assessment Plans as well as Basic Forms such as Meeting Participation or Consent for Placement forms can be sent to the parent/guardian, general education teacher or others via an emailed link. These links are referred to in general as "Requests for Input".

Before using this feature, check with your district's policy regarding emailing form links to parents.

Consent and Signature Form Procedures:

1. Before the meeting the Case Manager should enter the titles and dates onto the Meeting Participation form of the participants next to the eSignature lines. On some forms there are other meeting-related fields that should be filled.   The case manager can also electronically sign the form at this time.

2. Then for those staff who have access to SIRAS such as the psychologist, Speech/Language Pathologist, those participants should log in SIRAS individually and sign the Meeting Participation form electronically.

3. If the student is the age of majority (18 or over) they sign as 'Parent/Guardian/Adult Student'; otherwise the student signs as 'Other Participant'.

4. The case manager clicks the 'Manage Links' and emails that link to the General Ed Teacher for signing as the General Ed Teacher does not have a SIRAS account. This should be done before the meeting.

    ✉ Manage Links

5. When all have signed, then send the Meeting Participation form to the parent/guardian. The email of the parent should auto enter from the parent contact. Confirm the parent's email prior to sending.

6. Review forms for accuracy and enter the meeting notes.

If this will be a Continuation Meeting, on the IEP Manager click 'Add Meeting Continuation' button. --- And complete the Meeting Event information shown to the right. Then open the 'Meeting Participation' form and click the '+Add Page (Meeting Continued)' button located at the top of the form.	
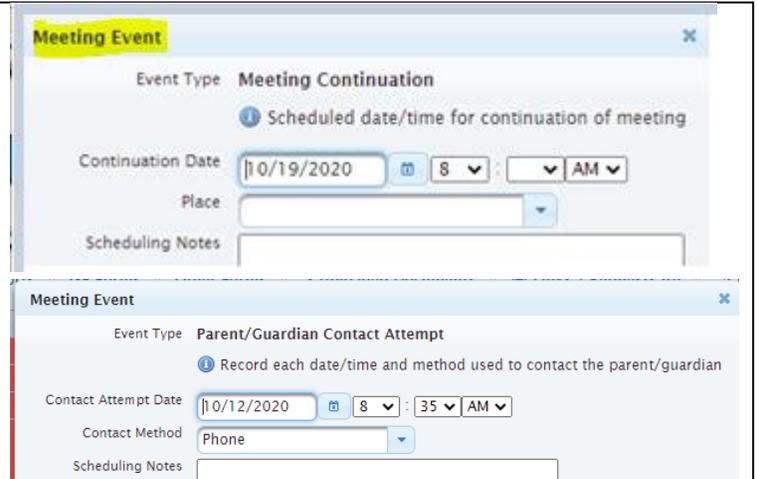
If it is <u>NOT a continuation meeting</u>, click meeting "**Held**" checkbox – *Awaiting Consent"*.

7. Open the Consent for Placement form. If the form has initial lines for the parent, select 'N/A' next those initial line that you do NOT want the parent to initial *(see pages 6-7 of this handout).* And use the 'Manage Links' and send to the parent/guardian/adult student.

8. In the body of the email below provide directions for the parent. Send to the Parent/Guardian/Student. Confirm name and email. If parents are together, send one form link where they can both sign the form together; if separated, it is more appropriate to send a different link to each parent. Each request has a recipient name associated with it, and additionally the full name of the signee is also required for each signature.

   Tip: Have parents use different signature colors and instruct one parent to sign the top line and the other the bottom line so the signatures do not get overwritten.

9. Once signed and returned by the parent/guardian, change Parent Response to '*Accepts the plan (signed consent)'* (assuming that is the appropriate response) then Finalize the meeting.
   The link will be active for 2 week or until the meeting has been Finalized. *(see pages 5-6 of this handout).*

10. After the meeting has been Finalized, click the **Send Form Link** button and send the Finalized IEP to the parent/guardian.

Sender:

The sender (SIRAS user) will open and complete the necessary items in the form prior to sending. After clicking '**Save and Return'** button on the form, the user will see a link in the Action column in the IEP Manager: 'Manage Links. Once the sender clicks on that link, SIRAS will prompt the sender to indicate whether the link will go to the parent, the general ed teacher or others who do not have access to SIRAS; and then require that the sender enter the name and email address of the recipient *(see screenshot below).* If the parent's email address is in the SIRAS contacts, SIRAS will auto enter that email address (confirm email address*)*; SIRAS will also remember the email addresses of the general ed teachers after they have been used once. Always confirm the recipient's email prior to sending. You may want to add to the directions in the email to clarify what you would like the recipient to do. When done click the **Send Email** button.

If you have problems where that the recipient is not getting the email containing the email link, use the **Copy to Clipboard** button, open your own email and paste that text into the body of your email and send to parent. Always remember to confirm the email address that you are sending to.

If you are sending the Spanish, be sure to open the Spanish Meeting Participation form or whichever form that you are sending, complete the form (i.e. enter the 'N/A' where you do not want the parents to initial) and save and return. Click the Manage Link button and then click the 'Spanish' radial button to send the Spanish version of that form to the recipient.

There is an option to save the link **Copy to clipboard** button where the user can paste the link into their own email. the web address which the recipient can use to access SIRAS and provide data and/or signatures.

Recipient:

The recipient would then open the email, read the directions (hopefully) and then click the form link provided below in the email message. The form link will be active for one week or until the meeting has been Finalized. The form will open in the recipient's web browser for them to view and complete. If signatures are required, the recipient signs their eSignature on the document. When finished the recipient will click the **Save and Close** button located at the top-left side of the form. The same form link in the original email can be opened again if it was mistakenly closed or the form wasn't completed.

Once the form has been saved, the SIRAS users will see the completed form in SIRAS. The form link will remain active until the Meeting has been Finalized.

When the parent/guardian opens and views the Consent for Placement form they will see several buttons at the top of the page: **View Notice of Rights** and Safeguards; **View Full Document** (IEP); and **View Progress Report** (last progress report from previous IEP). *(See page 6 on this handout)*

Resending or Canceling Form Link:

If the Parent incorrectly signed the Consent for Placement form or if there were other problems, the case manager can click the 'Manage Links' link next to the form link. On the 'Manage Links' you will see a tab **'? Existing Links'**. To resent the form link click Edit / Re-Send or to cancel the request click the red '**X**'.

If Pending is highlighted, the recipient had not finished the form. When the form is completed by the recipient 'Complete' will be indicated, else 'Mark as Complete' will be noted. All links must be noted as 'Complete' before the meeting can be Finalized.

Only one link request can be sent per form.

When sending the link again, you will see a log of Existing Requests. Use the links in the Status column to repeat the process. *See below*

Manage Links

Create / Send New Link	**1 Existing Link**		
Link Created	**Link Status**	**Recipient**	**Expires**
8/8/2020 6:50 PM by Steve Ormbrek	Pending ✉ Edit / Re-Send 0 signatures Mark as complete	Parent/Guardian: Fred Flintstone Steve@sirassystems.com	8/22/2020 ✖

Spanish Signature Forms:

To send Spanish forms to the parent, check the Translation Required checkbox, open the Spanish and complete the Spanish forms. The 'Manage Links' link will include a parameter to access the Spanish version of the form. Like all Spanish forms, the Spanish form will need to be opened and closed prior to sending.

📄 [IEP 12] Notes & Additional Information	☑ Spanish	✓	2 additional pages
📄 [IEP 9A] Consent and Signatures	📄 Spanish ✖	✓	➔ Send request for input
📄 [IEP 9B] Attendance and Signatures	☑ Spanish	✓	➔ Send request for input

View Log of Pending and Completed Form Input Requests:

✉ Links / Requests (4)

Select the '**Links / Requests'** tab on the IEP Manager. You will see a log of Pending and Completed under the 'Send Link' column. This log can assist in the authentication of the signatory.

		Links / Requests for this meeting			
Link Created	**Link Type**	**Link Status**	**Recipient**	**Request For**	**Expires**
8/8/2020 6:50 PM by Steve Ormbrek	Form Input Request	✉ Edit / Re-Send ✔ Completed 8/8/2020 7:20 PM 0 signatures Mark as incomplete	Parent/Guardian: Fred Flintstone Steve@sirassystems.com	🗋 [IEP 10B] Consent for Placement	8/8/2020 ✖
8/8/2020 7:17 PM by Steve Ormbrek	Form Input Request	Pending ✉ Edit / Re-Send Mark as complete	Parent/Guardian: Tweety Bird Steve@sirassystems.com	🗋 [NC 6A] Notice of Meeting	8/22/2020 ✖
8/8/2020 7:18 PM by Steve Ormbrek	Form Input Request	✉ Edit / Re-Send ✔ Completed 8/8/2020 7:19 PM Mark as incomplete	Parent/Guardian: Elmer Fudd Steve@sirassystems.com	🗋 [NC 3] PWN-Assessment Plan	8/8/2020 ✖
8/8/2020 7:19 PM by Steve Ormbrek	Form Input Request	Pending ✉ Edit / Re-Send Mark as complete	General Ed Teacher: Bugs Bunny Steve@sirassystems.com	🗋 [NC 9] Staff IEP Meeting Notice	8/22/2020 ✖

Electronic Signatures

Forms that require signatures or initials can now be signed electronically. eSignatures can be made while logged into SIRAS, or if the user does not have access to SIRAS use the 'Manage Links' to the right of the form link in the IEP Manager.

For signatures that occur via an emailed link, the recipient will open the form and only be permitted to enter, sign, or initial the appropriate fields on that form. These fields will be highlighted for the parent/guardian. When clicking on a signature field, SIRAS will default the name on the signature to be the same name as is on the request; but this can be edited, such as in the case where 2 parents are signing at the same time.

Use the mouse or touchscreen to draw the eSignature in the center of the signature pad, make sure the Full Name of who is signing is in the text input below, and then click the '**Sign**' button. SIRAS will auto enter the current date and copy the name into the appropriate place next to the signature line on the form. If initials need to be repeated, the second click on an initial line will auto enter the initials.

When the SIRAS user opens the form, they will see the signature of the recipient (signatory).

Sign and the signature line and enter your full name below.

When using the **Consent for Placement,** it is important that the attendees who have access to SIRAS log into sign the form BEFORE sending the Consent for Placement form to the parent/guardian. The SIRAS email form links are intended only to be used for non-SIRAS users, such as the Parent/Guardian or the General Ed Teacher.

After the parent clicks on the form link, the parent/guardian will see this task bar at the top of the Consent for Placement form *(see pict below).* The signature lines, initial lines and parent response checkboxes will be accessible to the parent.

At the top of the **Consent for Placement form** the parent has these button options:
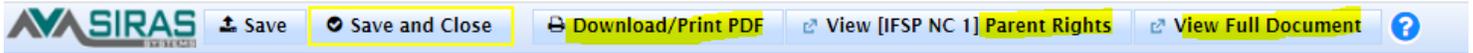
> **Save** – Saves the work
> **Save and Close** – saves the work and closes the page
> **Download/Print PDF** – Downloads Consent and Signature form
> **Parent Rights** – view the Parent Rights document
> **View Full Document** – Allows the parent to view a "Draft" of the full meeting document. Every
> page will have the word "Draft". Make clear to parent that this is a

SUGGESTION: Before sending the form link to the parent, apply the 'N/A' to the initial lines that you do not want to the parent to initial. Call the parent ahead of sending and walk the parent on how to click the form link and then which initial lines to check and where to sign. Explain to the parent what they are initialing and/or signing.

Prevent Parents from Initializing the Wrong Initial Lines:

If your Consent for Placement form has initial lines for the parent, to prevent a parent from signing the wrong initial lines, the case manager should select the 'N/A' option to the left of the initial line. Once the parent receives the Consent for Placement form, they will not be able to initial those with 'N/A'.
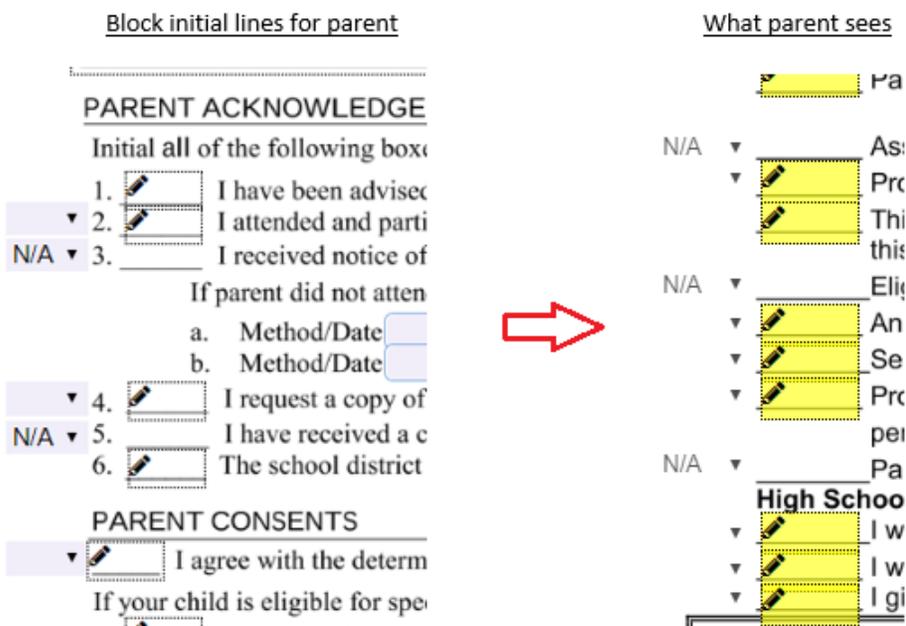
Change Log tab:

The 'Change Log' tab in the IEP Manager will record the forms that were changed before the meeting and after the parent/guardian has signed the form. The changes made after the parent/guardian has signed are noted by a yellow triangle. After the parent(s) have signed the IEP the forms should not be manipulated.

ⓘ Agreement-Attendance signed by Parent/Guardian on 5/5/2020 8:36 AM

⚠ Changes occurred after the parent/guardian signature was made. Please review carefully and re-send signatures if necessary

	Pre-Meeting	Basic IEP Forms	ISP Forms	Other Forms	Uploaded Documents	Requests for Input (3)	Change Log

Date/Time	Event	Changed By
4/20/2020 2:48 PM	Medi-Cal Permission Form Submitted	Steve Ormbrek
5/5/2020 8:24 AM	Student Info and Services Submitted	Steve Ormbrek
5/5/2020 8:31 AM	Agreement-Attendance signed	Steve Ormbrek
5/5/2020 8:31 AM	Agreement-Attendance Submitted	Steve Ormbrek
5/5/2020 8:36 AM	⚠ Agreement-Attendance signed by Parent/Guardian	Mark Abraham
5/5/2020 8:38 AM	⚠ Present Levels Submitted	Steve Ormbrek
5/5/2020 8:38 AM	⚠ Positive BIP Submitted	Steve Ormbrek

Removing of Deleting an Initial or eSignature

Double click on either the eSignature of initial and click 'Remove Signature' button.

Signature ✕

B B

Bugs Bunny

signed 10/12/2020 8:58 AM

Parent/Guardian Steve@sirassystems.com

Remove Signature   Close

Sending Parent Finalized IEP: There are two ways to do this:

1) Go to the IEP Manager of the Current IEP and click the **Send Form Link** button:

📄 [IEP 7B] FAPE and Educational Setting	↺	
📄 [IEP 8] Supplemental Aids and Transportation	↺	
📄 [IEP 9] Notes & Additional Information	↺	
📄 [IEP 10A] Consent & Signatures	↺	
📄 [IEP 15] Consent to Bill Medi-Cal	↺	

↱ Send Forms Link   📁 View/Print All Forms   Basic
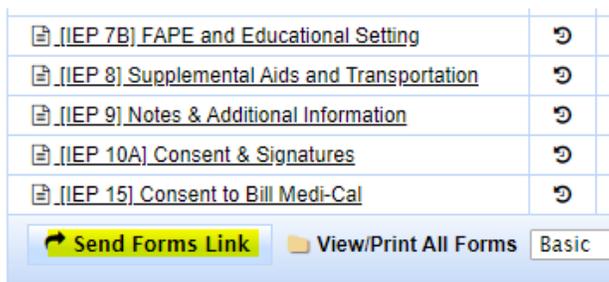
2) Open the IEP Forder. This will open the Current IEP. At the top of the form click the **Send Form Link** button:
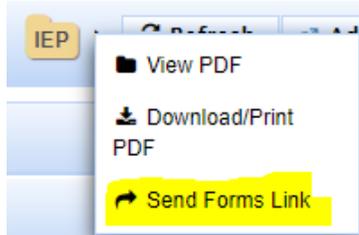
Email domains blocking messages from Siras containing Links:

If receiver encounters difficulty getting the emails delivered you should receive a Siras message on the home page with the details of why the email was not delivered.

Several district email servers have been rejecting the emails from mailbox@sirassystems.com due to security policy. Have your district's IT staff to troubleshoot this issue and 'white list'/apply permissions to @sirassystems.com. District IT staff are welcome to reach out to us at support@sirassystems.com