4-steps to Meetings/LPACs with Ellevation Forms for Specialists

Please read first

- *If you have any questions along this 4-step journey, refer to the additional resources for each step or reach out to our Ellevation Support Team at support@ellevationeducation.com.*
- *This document is designed to be used* ***online*** *to access all the linked resources to get started, follow along, and check off as you complete the steps. However, it can also be printed as a document.*
- *To make a personal copy of this clicksheet to check off steps as you go, please go to File > Make a copy* ***or*** *click here (note that you will not see any Ellevation updates with your copied version).*

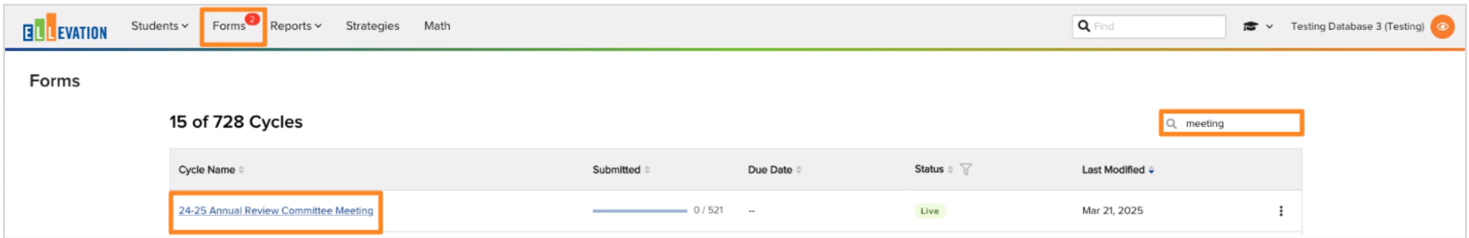
Step 1
Navigate to the Meeting Form

The first step is to navigate to the correct Cycle.

☐ Log in to Ellevation and click the **Forms** tab in the Navigation bar.

☐ Click the name of the Meeting Cycle.

i. *Optionally,* you can use the search bar in the top right to quickly find the correct Cycle if you have multiple Cycles.



If you checked both boxes, you're done with the first step! 🎉

Additional resources for Step 1

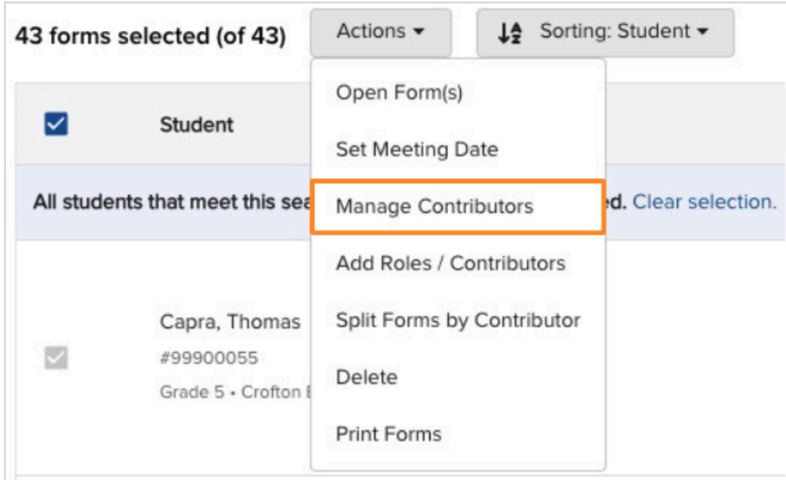
⏯️ [Complete Annual LPAC Reviews Meetings] *(1:01 min video)*

📘 [How to fill out Forms] *(Resource Center article)*

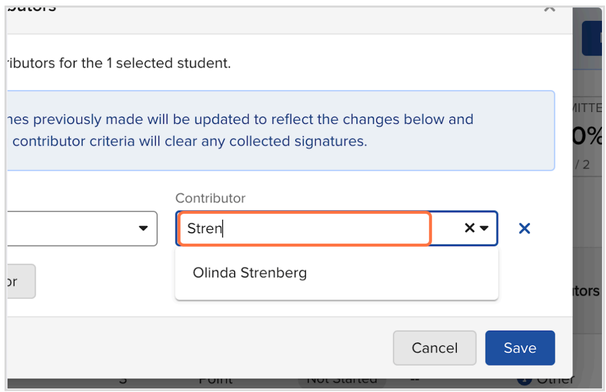
Step 2 Add Contributors and Date	**The second step is to adjust the Contributors, who are the attendees.**

Once you have opened the Cycle, you can manage the Contributors (for users with this Permission). Otherwise, contact your Ellevation Administrator to update Contributors or skip to Meeting Date.

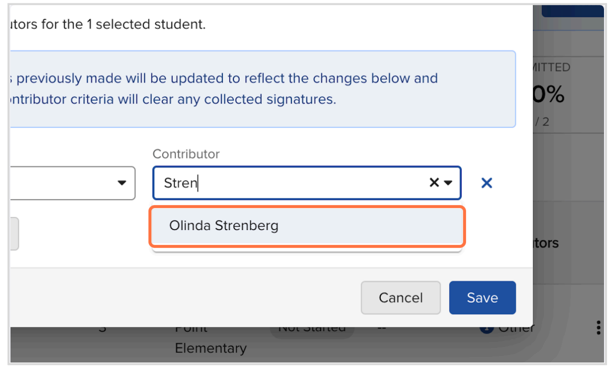
- ☐ Manually add Contributors by checking one or more Form(s) and selecting **Manage Contributors** from the **Actions** menu. Then, add, edit, or remove Contributors.



- ☐ Once you have the appropriate Contributors, add the name(s) of the person(s) who are in the listed Role(s). To do so, begin typing the name:

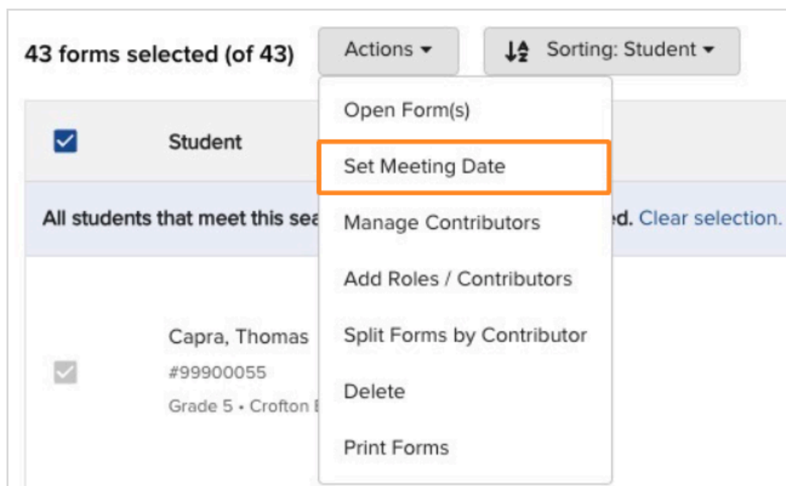


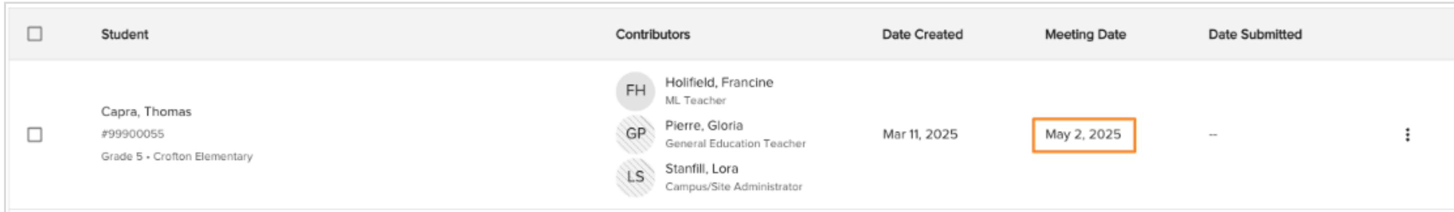
- [ ] Click on the name to add the person to the Form. Repeat for all Contributors. *(If adding a parent/guardian, simply click enter to add the name).*



🏆*Pro Tip: Remember to add a Contributor Role and Name for anyone who will not be in attendance that you'd like to collect a signature from at a later time. This will ensure a signature line is created on the Form. If you know the Contributor will not be in attendance, be sure to mark them as optional.*

- [ ] *Optionally, you can set a Meeting Date in bulk for each Form by checking one or more Form(s) and selecting **Set Meeting Date** from the Actions menu.*





☐	Student	Contributors	Date Created	Meeting Date	Date Submitted	
☐	Capra, Thomas #99900055 Grade 5 • Crofton Elementary	FH Holifield, Francine ML Teacher GP Pierre, Gloria General Education Teacher LS Stanfill, Lora Campus/Site Administrator	Mar 11, 2025	May 2, 2025	--	⋮

🏆 *Pro Tip:* ***Meeting Date*** is manually set and can be changed as needed, whereas ***Date Submitted*** will reflect the date the Form appears in the Submitted bucket.

Additional resources for Step 2

📘 Manage Contributors *(Resource Center article)*

Step 3
Conduct and Sign Meeting

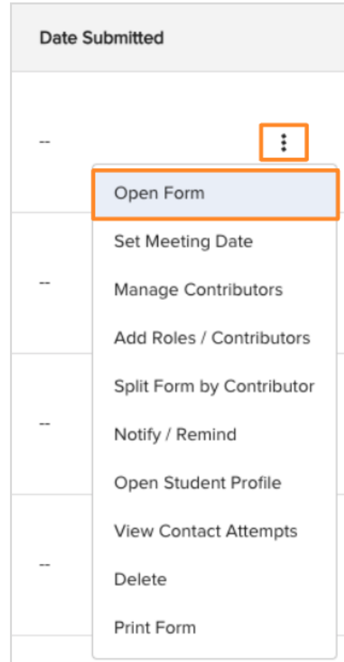
The third step is to conduct the meeting!

Note: Depending on your Ellevation Permissions and district's process, you may need to add students to the Cycle. Learn how to add students in multiple ways here.

Your Cycle may or may not include a **Done Editing** bucket, based on how your Ellevation Administrator set it up. To conduct your meeting(s), follow the instructions for your scenario below.

Option 1: If you do <u>not</u> see a Done Editing bucket, you'll follow the steps below to open and sign one Form at a time:

- ☐ Click the **3 dots** to the far right of the student's name > **Open Form**.


Date Submitted
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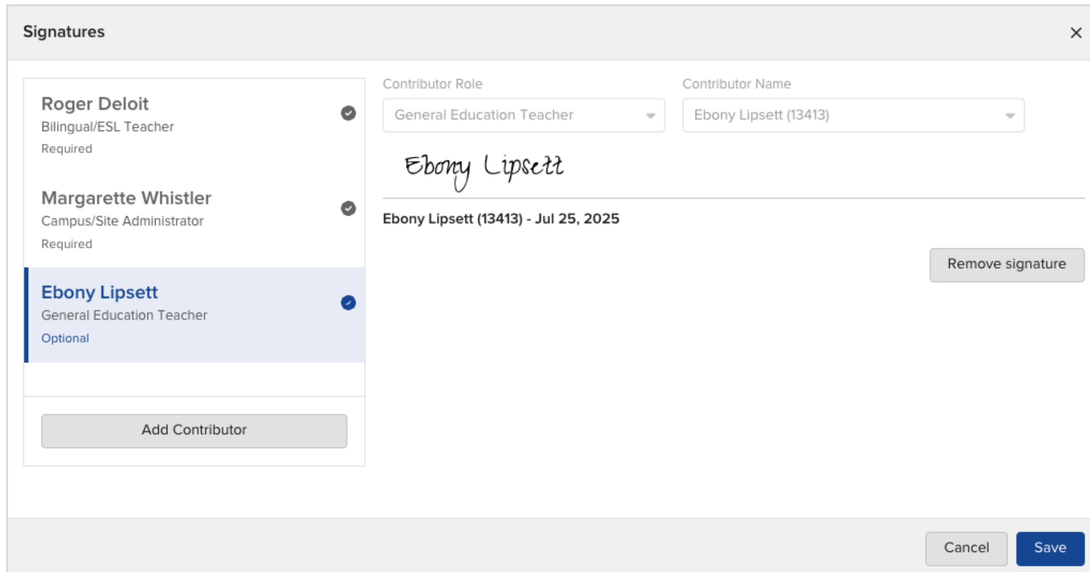
Open Form
Set Meeting Date
Manage Contributors
Add Roles / Contributors
Split Form by Contributor
Notify / Remind
Open Student Profile
View Contact Attempts
Delete
Print Form

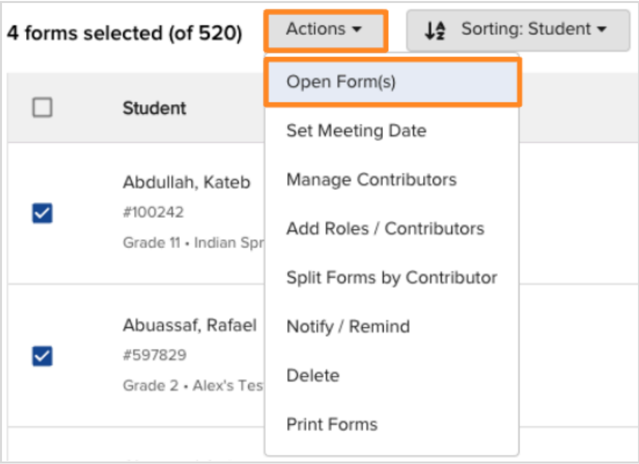
- ☐ Fill out the Form.
- ☐ Once the Form has been filled out, click **Sign**.
- ☐ Have each Contributor choose or draw their signature.
- ☐ Once you've collected signatures, click **Save**.
- ☐ Click **Submit**.



Option 2: If you do see a Done Editing bucket, you can follow the steps listed in Option 1 or open and sign multiple Forms at once by following these steps:

☐ Select students by clicking the box next to each student’s name or all students by clicking the box next to Student and clicking **Select all students that meet this search across pages.**

☐ Select **Actions** > **Open Form(s)**.



☐ Fill out the Forms.

☐ As each Form is filled out, toggle on **Done Editing**.

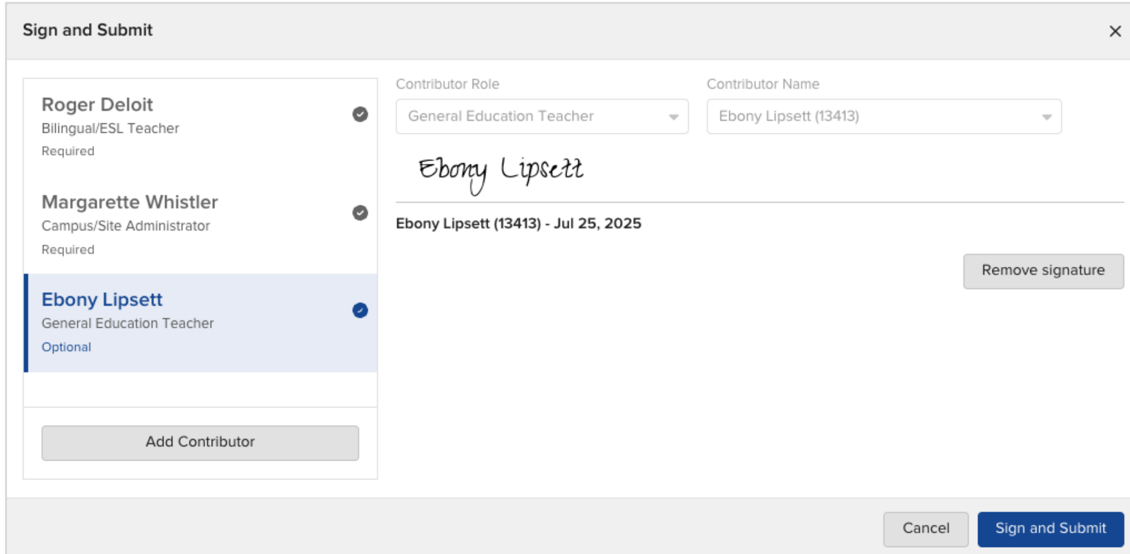
☐ Once finished with all Forms, in the top left corner, click **Back to Cycle Overview**.

☐ Click the **Done Editing** bucket.

☐ Select students by clicking the box next to each student’s name or all students by clicking the box next to Student and clicking **Select all students that meet this search across pages**.

☐ Click **Actions** > **Sign and Submit**.

- ☐ Have each contributor choose or draw their signature.
- ☐ Once you've collected signatures, click **Sign and Submit**.



Additional resources for Step 3

⏯️ [Complete Annual LPAC Reviews Meetings]() *(1:01 min video)*

📘 [Complete Forms]() *(Resource Center article)*

📘 [Sign and submit a Form]() *(Resource Center article)*

📘 [Sign and submit Forms in batch]() *Only possible if the Cycle was set up with the Done Editing status *(Resource Center article)*

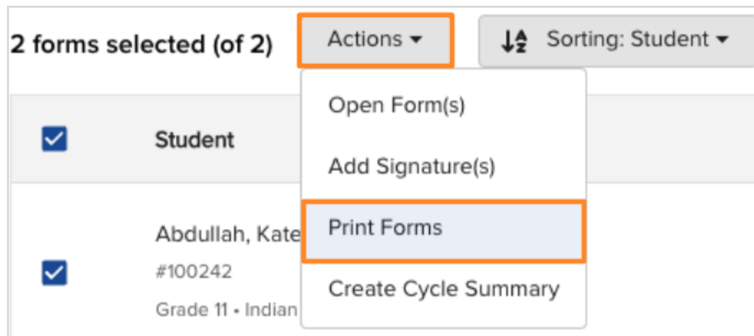
Step 4
Print Meeting Forms

The fourth step is to print Forms.

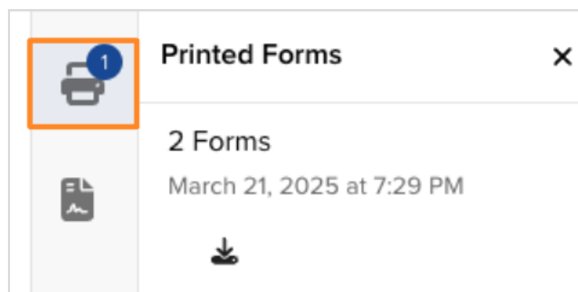
To print **submitted Forms**, follow these steps:

- ☐ Go to the Cycle overview and select the **Submitted** bucket.

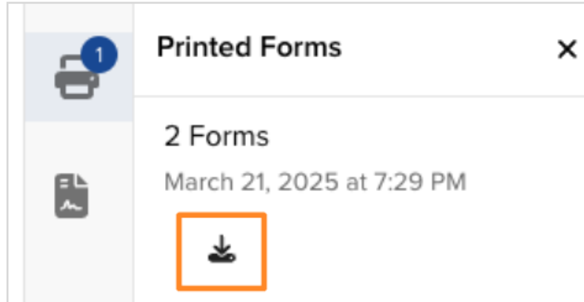
- ☐ Select students by clicking the box next to each student's name or all students by clicking the box next to Student and clicking **Select all students that meet this search across pages**.
- ☐ Select **Actions** > **Print Forms**.



- ☐ On the right side of your screen, click the **printer icon**.



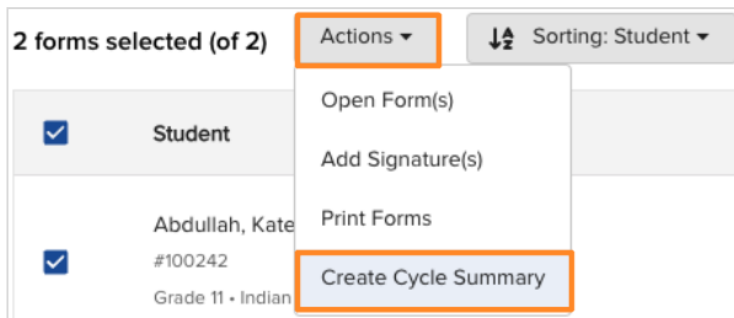
- ☐ Click the **download icon** to download and print your Forms.



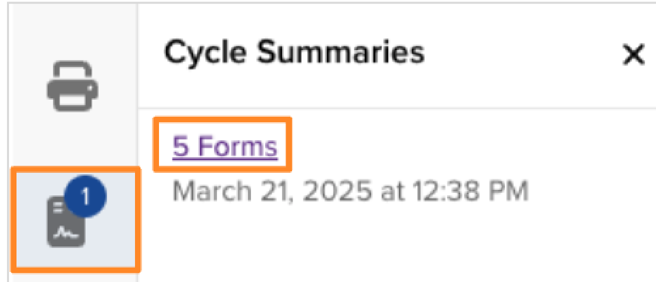
To print a **Cycle Summary**, follow these steps:

- ☐ Go to the Cycle overview and select the **Submitted** bucket.

- ☐ Select students by clicking the box next to each student's name or all students by clicking the box next to Student and clicking **Select all students that meet this search across pages**.
- ☐ Select **Actions** > **Create Cycle Summary**.



- ☐ Review the page of decisions and click **Print**.
  - Note: After clicking **Create Cycle Summary**, a number appears over the **document icon**. Click the **icon** to review a PDF printable version of the selected Cycle Summaries.



Leverage Dashboards

You can analyze Forms data in the Student List or using Data Dashboards. Check out the videos below to learn more!

- Use Forms Data in Dashboards *(4:46 min video)*
- Taking action on Forms in the Student List *(1:57 min video)*

Congrats! You have conducted meetings using Elevation Forms! 🎉

Additional resources for Step 4

⏯️ Print Forms *(1:07 min video)*
📘 Concluding Cycle Processes *(Resource Center article)*