

Truancy Enforcement  
Access Management System  
(TEAMS)

*Admin User Manual*

Northwest Toolbox

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# 1. What is TEAMS?

The Truancy Enforcement Access Management System (TEAMS) is a web-based application that enhances communication between schools and Northwest Regional ESD truancy enforcement officers. Using TEAMS, schools can submit truancy case requests online, view the status of a case, access student information and case history, and access and print student reports. All demographic information, notes, and files relating to a case are accessible online by both the school and the agency. TEAMS eliminates time-consuming paperwork, provides a way for both parties to track the progress of a case, and most importantly, keeps the lines of communication open.

*NOTE: Due to the sensitive nature of information in the TEAMS database, all identifiers such as student names and ID numbers have been omitted from the screen shots in this tutorial. Any student or personnel information displayed in this manual is fictitious and for training purposes only.*

## 2. Logging In and Logging Out

To log in:

1. Open a new browser window.
2. Navigate to <https://truancy.nwtoolbox.org/>
3. The login screen displays:



Truancy Enforcement Access Management System

Log In

User Name:

Password:

Remember me next time.

Log In

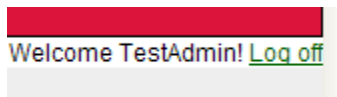
4. Enter your user name and password (assigned to you by NWRESD) and click the **Log In** button.
5. You are now logged in to TEAMS. At the top of the screen, a navigation menu displays tabs for **Requests, Mand. Meeting, Student Ids, Reports, Feedback, My profile, Users, Billing, and System.**

Requests   Mand. Meeting   Student Ids   Reports ▶   Feedback   My profile   Users   Billing   System ▶

By default, the requests list will display. Click any other tab to navigate to that portion of the site.

To log out:

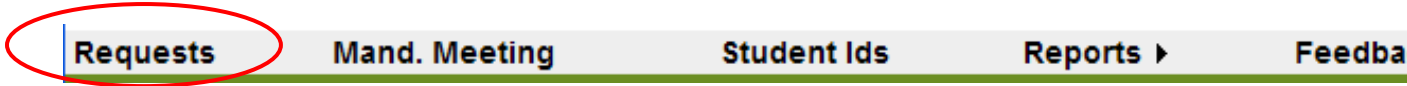
At the top right of the screen is a welcome message with your username. Next to it are the words **Log off**. Click **Log off**.



Welcome TestAdmin! [Log off](#)

### 3. Navigating the Requests Tab

To access the requests list, click the **Requests** tab at the top of your screen.



#### 3.1. Requests Tab Overview

The **Requests** tab displays a list of truancy case requests submitted by your school. This list provides the following information:

1. The number (#) of the case.
2. Date the request was generated.
3. School that generated the request.
4. Student's name.
5. Student's SSID.
6. Step in the truancy process.
7. Deputy assigned to the case,
8. Most recent update on the case.

#	Open	School	Student	SSID	Step	Deputy	Last Update	
0809-1026	Jun 01, 09		Johnson, Paul	125	IR		Oct 08, 09 [Redacted] Admin: *Billed	Select
0910-1030	Aug 14, 09		Can Uh, David	669	CIT		Aug 14, 09 School1: *Request Open	Select
0910-1028	Jul 08, 09		Student, Testing	236	IR		Jul 08, 09 School1: *Request Open Testing out the referral add functio ...	Select
0910-1029	Jul 08, 09		Test, Test	569	CIT		Jul 08, 09 School1: *Request Open	Select
0910-1032	Oct 08, 09		Shaw, Echo	12345	MM	Deputy1	Oct 08, 09 Deputy1: *Mandatory Meeting	Select
0809-1017	Sep 18, 08		dfdfd, fdfd	hsd25641	CIT	Deputy1	Oct 07, 09 [Redacted] Admin: *Assigned to Deputy1	Select

Select a request to see details ...

Additionally, all requests are color-coded by status:

- Red** – open and unassigned
- Blue** – assigned to a deputy officer; currently open and active
- Black** – closed requests

### 3.2. Sorting and Filtering Requests

To display only certain types of requests, check the desired boxes beneath the words **Filter by status** at the top left-hand corner of your screen. You can display open requests, closed requests, requests assigned to deputies, or any combination of the three types.

**Filter by status:**  
 Show open requests (2)  Show requests assigned to deputies (0)  Show closed requests (0)

You may also filter by text (i.e., search for requests with a certain last name, state ID, or request number) or by the step (stage) of the referral process, as shown below. To filter by text you must hit Apply. To filter by step you simply check the boxes that apply to your chosen filters.

**Filter by text**  
 Filters by either student first name, last name, state id, or request number  
 **Apply** **Clear**

**Filter by step**  
 Citation  Initial Referral  Mandatory Meeting

Regardless of how you filter the requests list, the list can be sorted according to any of the categories: number, date generated, school, etc.. To sort the list, simply click the **blue highlighted** category name and the list will re-sort according to this category.

#	Open	School	Student
0809-1026	Jun 01, 09		Johnson, Paul
0910-1030	Aug 14, 09		Can Uh, David
0910-1028	Jul 08, 09		Student, Testing
0910-1029	Jul 08, 09		Test, Test
0910-1032	Oct 08, 09		Shaw, Echo
0809-1017	Sep 18, 08		dfdfd, dfdf

Select a request to see details ...

### 3.3. Viewing a Request in Detail

To view all the details of an existing request:

1. Click the word **Select** located on the right-hand side of the request.

[Select](#)

2. The request details display at the bottom of the screen.

Check to confirm closing' and a 'Close request' button. On the left side, there is a sidebar with student information: Absences: 5, School: school1 (5038813376), School Admin: Student: Paul Johnson (DOB: 03/12/1995, Age: 14), Parents: Sue and Mike Johnson (123 a street, hillsboro, OR 97124, 5031111111)."/&gt;

There are several features of the request details:

1. **History** tab: displays any notes entered and allows the user to print the student's full case history (including absences and what stage the case is at) or just notes:

[History](#) [Notes](#) [Billing](#) [Assign deputy](#) [Notices](#) [Mandatory m](#)

[Print full history](#)

[Print these notes only](#)

[x] 10/09/09 TestAdmin: \*Billed

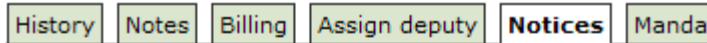
10/08/09 Deputy1: \*Mandatory Meeting

10/08/09 amytest: \*Request Open This is a test parent only.

2. **Notes** tab: allows the addition of notes to the student's case.
  - a. Enter date (brings up a calendar from which the date may be selected)
  - b. Enter notes in the white text box.
  - c. Hit Save note.
  - d. If desired, check the box to send an email to the school containing the new note.



5. **Notices** tab: allows you to generate PDF notifications. Click the title of the notification to generate the PDF.

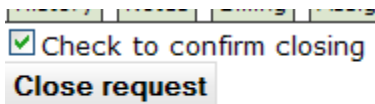


- › [Notification of Noncompliant Attendance](#)
- › [Notification of Noncompliant Attendance\(SPANISH\)](#)
- › [Pre-Arrestment Agreement](#)
- › [Mandatory School Attendance Meeting](#)

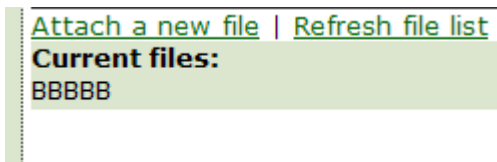
6. **Mandatory meeting notes** tab: view mandatory meeting notes (only if the student is at the mandatory meeting stage of the referral process). If applicable, click date and time of meeting to view notes.

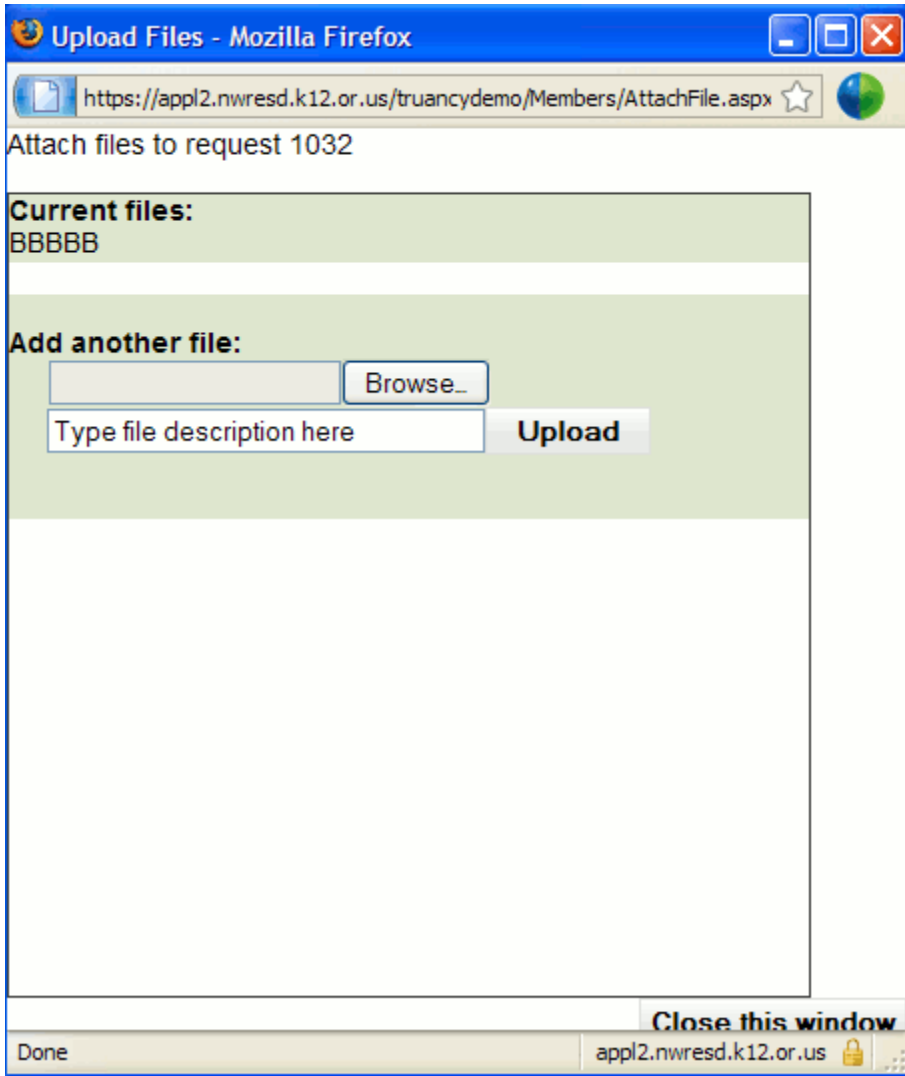


7. **Close request** tab: allows you to indicate the request has been closed.
- a. Check the "Check to confirm closing" box.
  - b. Click Close request button.



8. **Attach file** tab: allows you to view currently attached files, and attach new ones.
- a. Click **Attach a new file** to browse for and upload a file.

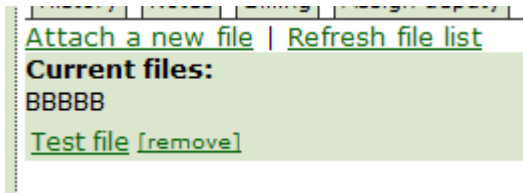




Browse for the file on your computer. Then type a file description and click Upload.



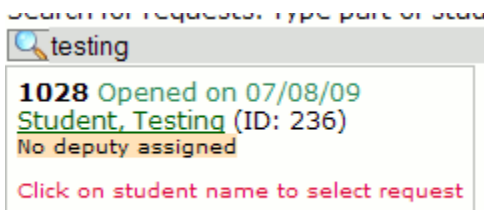
Click Refresh file list to see your new file(s).



Click the name of a file to view it.

Click **remove** next to any file to remove it.

9. **Search tab:** allows you to search for other requests by student name or ID. Type part of student name or ID and click Search.

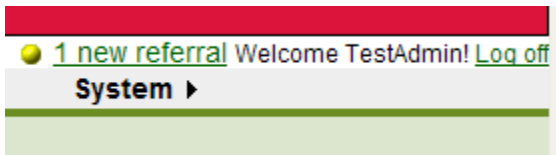


## 4. Approving New Referrals

To create a new request (referral) you must be logged in as a school user. Please see the school user manual.

Once the request has been submitted, the admin user will see it upon logging in. To approve a new referral:

1. Click the new referral notice next to your “Welcome” message on the top right of your screen.



2. The new referral request appears on the screen. Enter the student’s State Id (SSID) then click the Assign button.

There is 1 new request(s) without ssids. To assign student ids please use the following table:

#	Open	School	Student	DOB	Address	State Id		
1	1033	10/09/09	Sample District/Sample Elementary	Garcia, Molly	01/01/1995	123 Aspen Lane, Beaverton, OR 97007	1234567	Delete

Assign

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3. Although no message will appear on the screen once you hit Assign, if you return to the **Requests** list you should now see the new referral. Don’t forget to also select the student by hitting **Select**, and assign them to a deputy. (See Section 3).

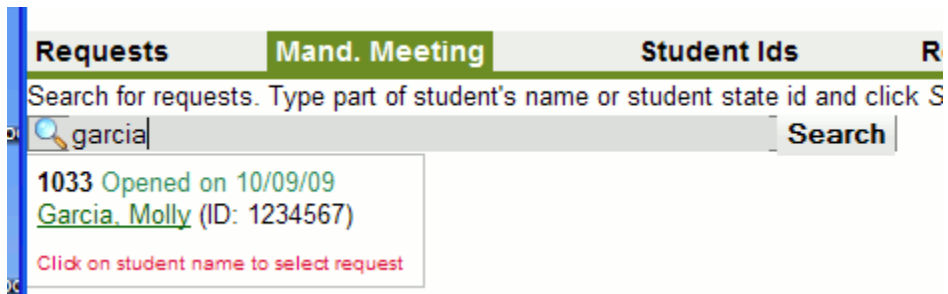
## 5. Creating Mandatory Attendance Meeting Notes

To create a mandatory attendance meeting note for a student who is at the “mandatory meeting” stage of the referral process:

1. Click the **Mand. Meeting** tab at the top of the screen.
2. Type the student’s name or SSID in the search box and hit **Search**.

NOTE: If a student is not currently in the mandatory meeting stage you will NOT be able to search for them in this screen.

3. Click the student’s name to select him/her. (Note: student must be assigned to a deputy first.)



4. The student's name, reference ID, and school will be pulled down into the fields below. Fill out the remaining fields as necessary, then hit **Save (buttons are on both the top and bottom of the screen)**. Don't forget that date and time of meeting are required fields.

---

Reference Id: 1033 Date: 10/09/09 Time:

Billable time:  30m  1h  1.5h  2h  3h  3.5h  4h

**Student:**

**School:**

**Parent/Guardian (\*)** (enter at least one line)

Father:	<input type="text"/>	DOB:	<input type="text"/>	ODL:	<input type="text"/>
Mother:	<input type="text" value="Gemi Garcia"/>	DOB:	<input type="text" value="090270"/>	ODL:	<input type="text" value="123456789"/>
Legal Guardian:	<input type="text"/>	DOB:	<input type="text"/>	ODL:	<input type="text"/>

**School Personnel Present:**

**Action: (\*)**

**Attendance Deputy:**

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Your mandatory meeting notes now show up in the request details. See Section 3.

## 6. Searching for Students

To search for a student to see if he/she is already in the TEAMS database:

1. Click the **Student Ids** tab.
2. Type any part of the student's name or SSID in the box, and click Search.
3. Results, if any, will be returned.

Requests	Mand. Meeting	Student Ids	Reports ▾	Feedback	My profile	Users	Billing
Search for student. Type student's first name, last name or student state id and click <i>Search</i>							
test		<b>Search</b>					
○	<a href="#">Student, Testing</a>	SSID: (236)	Birthdate: 03/10/2019	Address: not sure, Hillsboro, OR 99777			
○	<a href="#">Test, Test</a>	SSID: (569)	Birthdate: 05/05/2005	Address: Unknown, Hillsboro, OR 97212			

4. Click the student's name to view their name, birthdate, address, and current school which will appear highlighted in yellow.

Requests	Mand. Meeting	Student Ids	Reports ▾	Feedback	My profile	U
Search for student. Type student's first name, last name or student state id and click <i>Search</i>						
est		<b>Search</b>				
○	<a href="#">Student, Testing</a>	SSID: (236)	Birthdate: 03/10/2019	Address: not sure, Hills		
○	<a href="#">Test, Test</a>	SSID: (569)	Birthdate: 05/05/2005	Address: Unknown, Hil		
Name: <b>Student, Testing</b> Birthdate: <b>03/10/2019</b> Address: <b>not sure, Hillsboro, OR 99777</b> School: <b>Tobias Elementary (Hillsboro NWRES)</b>						

## 7. Running Student Reports

TEAMS gives you access to the history of all requests for a particular student, along with all notes associated with that request. To run a report on a student's request history:

1. Click the **Reports** tab at the top of the screen, and select **Students** or **Referrals**.



2. If you select **Students** – type into the **Search** box one or more letters of the first or last name, or one or more numbers of the student ID number.

Search for student. Type student's first name, last name or student state id and click *Search*



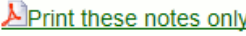
 

3. If the student is in the database, TEAMS will return the student's name as one of the search results. Click on the student's name.


Requests	Mand. Meeting	Student Ids	Reports ▶
Search for student. Type student's first name, last name or student state id and click <i>Search</i>			
<input type="text" value="garcia"/>		<input type="button" value="Search"/>	
<a href="#">Garcia, Molly</a>	SSID: (1234567)	Birthdate: 01/01/1995	

- The student's current info (age, parents, address) and requests history, along with all notes for that request, displays. To view multiple requests, you may have to scroll down.

To print the report to pdf, click **Print full report to pdf** (on the top right-hand side of the request). You may also print only the student's notes.

Current Info	Requests History
Age: 14 Parents: Gemi Garcia Address: <a href="#">123 Aspen Lane</a> <a href="#">Beaverton ,OR 97007</a>	<div style="text-align: right;">  <a href="#">Print full report to pdf</a> </div> <p>Ref #: 1033 Open: 10/09/09 Closed:  10/09/09 09:20 AM by <a href="#">Deputy1</a> School: Sample District/Sample Elementary Step: Mandatory Meeting Name: Molly Garcia Parents: Gemi Garcia Address: 123 Aspen Lane Beaverton ,OR 97007 Phone: 5035352345</p> <div style="text-align: center;">  <a href="#">Print these notes only</a> </div> <p>10/09/09 amytest: *Request Open Please do not call after 9 p.m. 10/09/09 TestAdmin: *Assigned to Deputy1 10/09/09 Deputy1: *Mandatory Meeting</p>


- If you select Referrals – a list of referrals will display. Use the drop-down menu to display only opened, updated, or closed referrals. Once you have selected parameters, click **Display Referrals**.

Show  referrals between  and  **Display Referrals** 

2 referrals

Ref#	Status	Updated / Closed	Last, First	SSID / DOB	Parents / Address	Home Phone
1023	opened	01/07/09	ALEXANDER, AMY	12/13/1979	Deanna Alexander	H: 5412313516 W:

Click the **PDF icon**, next to **Display Referrals**, to generate a PDF of the referrals you have selected.

**Display Referrals** 

## 8. Submitting Feedback

If you would like to give Northwest Regional ESD feedback about TEAMS, or have a question,

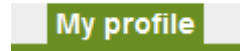
you may click the **Feedback** tab.

Select the subject of your message. Type your message in the **Message** box, then hit **Submit**.

Requests	Mand. Meeting	Student Ids
Have problems using the application, need help? Let us know ...		
Please, choose a subject, type in your message, and email it to us. Th		
<b>Subject</b>		
<input type="radio"/> Got an error message		
<input checked="" type="radio"/> I need help		
<input type="radio"/> I have a suggestion		
<input type="radio"/> Something else		
<b>Message</b>		
<input type="text" value="I am logged in as an admin. Why can't I add new requests?"/>		
<input type="button" value="Submit"/>		

## 9. Changing Your Password

To change your password, click the **My profile** tab.

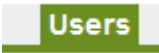


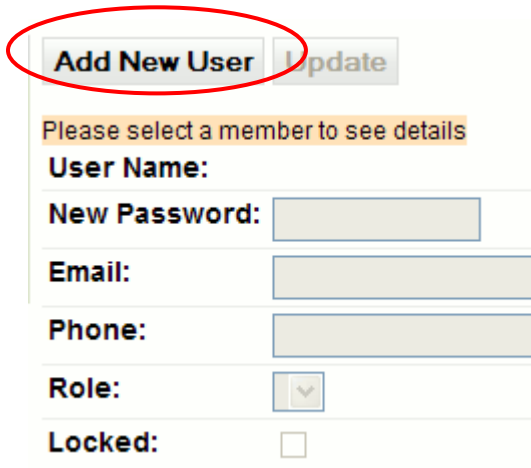
1. Type your current password.
2. Type your new password twice.
3. Hit **Change Password**.
4. If you decide not to change your password, hit **Cancel**.

**Change Your Password**  
User Name: **amytest**  
Current Password:   
New Password:   
Confirm New Password:

## 10. Adding and Managing Users

To add a new user:

1. Click the Users tab. 
2. Click Add New User.



**Add New User** Update

Please select a member to see details

**User Name:**

**New Password:**

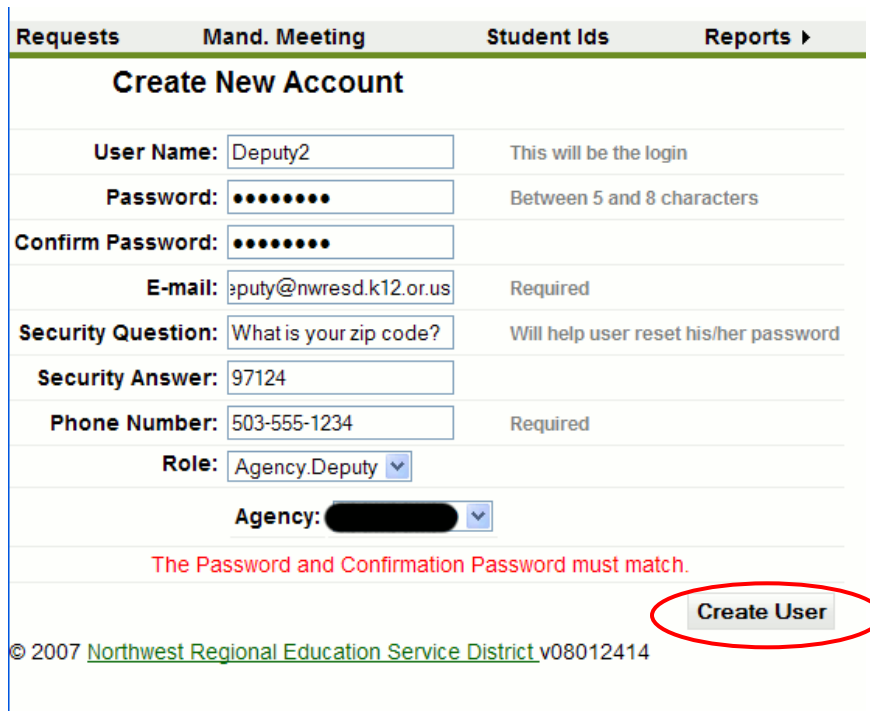
**Email:**

**Phone:**

**Role:**

**Locked:**

3. Fill in the person's username, password, role, etc., then click **Create User**.



Requests	Mand. Meeting	Student Ids	Reports ▶
<b>Create New Account</b>			
<b>User Name:</b>	<input type="text" value="Deputy2"/>	This will be the login	
<b>Password:</b>	<input type="password" value="••••••••"/>	Between 5 and 8 characters	
<b>Confirm Password:</b>	<input type="password" value="••••••••"/>		
<b>E-mail:</b>	<input type="text" value="deputy@nwresd.k12.or.us"/>	Required	
<b>Security Question:</b>	<input type="text" value="What is your zip code?"/>	Will help user reset his/her password	
<b>Security Answer:</b>	<input type="text" value="97124"/>		
<b>Phone Number:</b>	<input type="text" value="503-555-1234"/>	Required	
<b>Role:</b>	<input type="text" value="Agency.Deputy"/>		
<b>Agency:</b>	<input type="text" value="████████"/>		
<b>The Password and Confirmation Password must match.</b>			
<b>Create User</b>			
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To change the details (password, email address, role, phone number, district, or school) for a current user:

1. Click the **Users** tab.
2. A list of users displays, along with a check mark if they are active, and an X if they are inactive/locked.
3. Click the name of the user you wish to edit.
4. The user's details display to the right of the user list. Edit any information necessary.
5. Click **Update** to save your changes.
6. You may click the **Locked** box if you wish to inactivate an account.

Requests	Mand. Meeting	Student Ids	Reports ▶	Feedback	My profile	Use
<a href="#">Online</a>	<a href="#">Name</a>	<a href="#">School</a>	<a href="#">Active</a>	<a href="#">Add New User</a>	<a href="#">Update</a>	
1	<a href="#">amytest</a>	Sample District/Sample Elementary	✓	<b>User Name:</b>	<b>amytest</b>	
2	<a href="#">Deputy1</a>		✓	<b>New Password:</b>	<input type="text"/>	
3	<a href="#">[Redacted] Admin</a>		✓	<b>Email:</b>	<input type="text" value="aalexander@nwresd.k12.or.us"/>	
4	<a href="#">[Redacted] Admin</a>		✓	<b>Phone:</b>	<input type="text" value="614-1439"/>	
5	<a href="#">School User 1</a>	Sample District/[Redacted] Elementary	✓	<b>Role:</b>	<input type="text" value="Client School"/>	
6	<a href="#">School User 2</a>	Sample District/[Redacted] High School	✓	<b>District:</b>	<input type="text" value="Sample District"/>	
7	<a href="#">Virgil Hretcanu</a>		✓	<b>School:</b>	<input type="text" value="Sample Elementary"/>	
				<b>Locked:</b>	<input type="checkbox"/>	

# 11. Using the Billing Feature

Through TEAMS, you can track billable hours for each case. **Before you track billable hours, they must have been entered in the Billing section of the student’s request details. See Section 3.**

To track billable hours:



1. Click the **Billing** tab.
2. You may filter the billing information by District (if assigned to more than one district), billing status, or period (month and year).

You may also click directly on the name of your district, then the month(s) below that, to immediately see unbilled service.

Requests	Mand. Meeting	Student Ids
<b>Filters</b> District: <input type="text" value="Sample District"/> <span>▼</span> Billing Status: <input type="checkbox"/> Show billed <input checked="" type="checkbox"/> Show not billed <input type="checkbox"/> Show not charged Period: <input type="text" value="October"/> <span>▼</span> <input type="text" value="2009"/> <span>▼</span>		<b>Unbilled services</b> <a href="#">Sample District 3</a> <a href="#">2009 October 3</a>

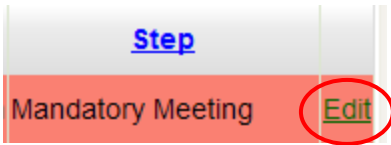
3. Based on your filters, a list of services displays. You may check the box next to any entry and then hit **Mark selected as billed** or **Mark not charged**. You may also delete charges, as well as print them to a PDF.

Note that you can also click on any blue heading to sort the list.

<a href="#">Mark selected as billed</a>   <a href="#">Mark not charged</a>   <a href="#">Print all to pdf</a>   <a href="#">Print selected to pdf</a>   <a href="#">Delete selected</a>									
	Ref#	Date Requested	Date Closed	Service Date	Date Billed	Student Id	Last Name	First Name	Bill Time (hrs)
<input checked="" type="checkbox"/>	1032	10/08/09		10/09/09		12345	Shaw	Echo	1.0
<input type="checkbox"/>	1033	10/09/09		10/09/09		1234567	Garcia	Molly	1.0
<input type="checkbox"/>	1032	10/08/09		10/08/09		12345	Shaw	Echo	1.0

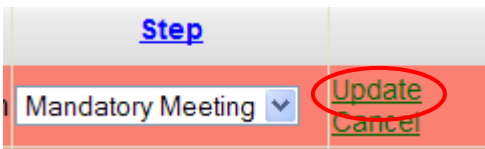
You may also edit the billable hours for any entry:

1. Click **Edit** (far right of the line, next to the Step information).



2. You may edit the Service Date or number of billable hours. At this time you cannot edit the step the student is at in the referral process. Click Update when you are done editing.

<u>Service Date</u>	<u>Date Billed</u>	<u>Student Id</u>	<u>Last Name</u>	<u>First Name</u>	<u>Bill Time (hrs)</u>	<u>School</u>	<u>School Contact</u>	<u>Officer</u>	<u>Step</u>
10/09/09		12345	Shaw	Echo	1	Sample Elementary	amytest	TestAdmin	Mandatory Meeting ▾

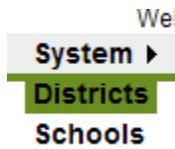


## 12. Editing District and School Information

You may edit the name of your district or the name and address of any school in your district. Please note that the district and schools must first have been added to the database by Northwest Regional ESD.

To edit the name of your district:

1. Click the **System** tab and select **Districts**.



2. The name of your district displays. Click Edit.



3. Type the new or correct name, and hit **Update**. You may also check and uncheck the **Active** box if you want to inactivate this entire district (will not be able to be used for referrals).

