Document Administration

Approval Dashboard:

• Approve/Decline requests to view documents
• Approve/Decline request to upload documents
• Decline View

Approval Menu:

• Approval: Document Request
• Approval: Fulfill Upload Request

epsportal.lacoe.edu
helpdesk@lacoe.edu
Approving Requests to View Documents

- Document requests are displayed in reverse chronological order, where the oldest request shows first.

- You can move through the list by clicking on the page buttons.
Approving Requests to View Documents

- Locate and click on the document that you’d like to approve
Approving Requests to View Documents

- Approve/Deny Reason is optional, but suggested if the request is denied

- Use the buttons to:
  - View the Document being requested
  - Approve
  - Deny

Less than 18 years
Approving Requests to View Documents

- If the student is 18 years or over, you will have the option to:
  - View Authorization Form
  - View Document being requested

- Click View Authorization Form to approve or deny the request
Approving Requests to View Documents

- View the Authorization Form

- Use the buttons at the bottom of the screen to Approve or Deny the request

18 years or over
Approving Requests to Upload New Documents

- Document requests are displayed in reverse chronological order, where the oldest request shows first.

- You can move through the list by clicking on the page buttons.
Approving Requests to Upload New Documents

- Locate and click on the Document Upload Request that you’d like to fulfill

<table>
<thead>
<tr>
<th>Student</th>
<th>SSID</th>
<th>DOB</th>
<th>Category</th>
<th>SubCategory</th>
<th>District</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAAATEST, Aaron</td>
<td>X902007041</td>
<td>1/1/1997</td>
<td>Student Accountability / Progress Reports</td>
<td>AB 216 Approved</td>
<td>Eagle Unified School District</td>
</tr>
<tr>
<td>AAAATEST, Aaron</td>
<td>X902007041</td>
<td>1/1/1997</td>
<td>Health / Medical Development</td>
<td>Immunization Record</td>
<td>Eagle Unified School District</td>
</tr>
<tr>
<td>Aguirre, Ingrid</td>
<td>0099100008</td>
<td>4/2/2003</td>
<td>Student Accountability / Progress Reports</td>
<td>Transcripts</td>
<td>Eagle Unified School District</td>
</tr>
</tbody>
</table>
Approving Requests to Upload New Documents

- Click to select the new file to upload
- Click to upload the selected file
- Click to continue
Approving Requests to Upload New Documents

- Enter a Document Name Comment
- Enter a Cover Sheet Comment
- Click Process
Declining Requests to View Documents

- If you decline a request to view documents for a student who is over 18, you will be asked to provide reasons for the decline.

- Check appropriate boxes and/or enter text.

- Click Next to continue.
Approvals: Document View Requests

- Approvals allows a document approver to access Document View and Document Upload Requests
- Select the District and the User
Approvals: Document View Requests

- Select the document request that you would like to Approve or Deny
- Refer to previous section on Approving Document Requests
Approvals: Fulfill Upload Requests

- Approvals allows a document approver to access Document View and Document Upload Requests
- Select the Upload Request that you would like to fulfill
Approvals: Fulfill Upload Requests

- Select file to upload
- Continue with Upload
- Refer to previous section on fulfilling Upload Requests