

Isolation and Restraint Documentation Process and Instructions

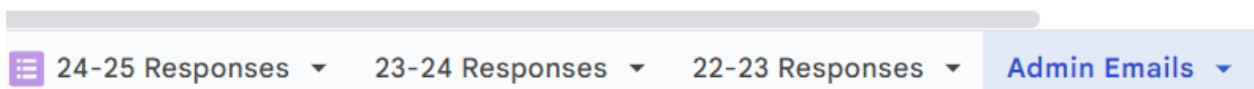
These instructions describe how to use **Google Forms** for certificated staff to report each instance of isolation or restraint, **Google Sheets** to store that data for district records, and **Autocrat** (a Google Sheets add-on) to share it out to administrators and parents, all in a mostly-automated single step.

Each time an instance of isolation or restraint occurs, cert staff will complete a single Google Form submission. All data from the form will be stored in a spreadsheet, key pieces of data will be shared with appropriate school administrators, and a parent notification letter will be created with the appropriate details of the event to be shared with parents. The letter itself and instructions for sharing it will all be emailed to the staff who submitted the form. All processes will occur automatically upon form submission.

DISCLAIMER: Setting this one-step reporting process will be several hours of work and may require fairly advanced troubleshooting of Google Sheets formulas, so it is recommended that it only be attempted by those with either a lot of patience, or a lot of spreadsheet experience.

This process requires 3 fairly-complicated setup steps:

1. Create a Google Form that incorporates all necessary data to be gathered.
 - a. [See this Form example](#), and copy all questions
 - b. Notice the use of multiple “sections” dividing questions, and “go to section” logic at the end of each section. The purpose of these sections is to provide multiple pathways to gather the appropriate information for a given scenario (isolation only, restraint only, or isolation and restraint both; also to gather different documentation of parent contact depending on whether they were successfully contacted or not). This reduces the inclusion of unnecessary questions for each situation type.
2. Link Google Form to a Google Sheet to store data. This Sheet will be complex –see details:
 - a. In your Form, Responses tab, select the “3 dots” settings at top-right, then “select destination for responses”. This gives you the choice to select your spreadsheet, or create a new one if you don’t have one yet.
 - b. Rename the destination sheet to the current year, using the tabs along the bottom



- c. Notice the use of individual tabs for each school year, it will be important to separate your data from each year, starting on July 1 each new school year. Re-selecting your existing spreadsheet (from the Form settings) as the destination for responses will automatically create a new sheet/tab each time you

do it, which you can rename for that new year. This new tab will include a copy of all prior form responses when it is first created, so in order to start fresh with a new year's data, you can go ahead and delete all rows in this new sheet (your data is saved on the previous year's tab/sheet, so it's not needed on the new one). When deleting the prior year's rows, be sure to do so by selecting the entire rows by left-clicking the numbers for the rows on the left (can multi-select rows by holding shift), then right clicking the row's numbers on the left, then selecting the option to "Delete rows". If you merely delete the content from individual cells instead of the entire rows, it will confuse the system.

- d. From the menus at the top, select Extensions, Add-ons, then Get Add-ons. **Search for and install an add-on called "Autocrat"**. This "mail-merge" add-on will be used to take data from each form response and use it to automate the notification emails and creation of necessary parent letters for each incident.
3. Set up Autocrat. This will be complex –see details:
- a. Create a new folder in your My Drive within Google Drive, and label it "Isolation and Restraint Documentation" (or something similar). Note that this will not work within a Shared Drive, it must be within an individual's My Drive.
 - b. Within that folder, create one subfolder for each of your schools. Also create one extra folder for your parent letter templates.
 - c. Going back to the spreadsheet you created in step 2, you will need an extra sheet/tab on your spreadsheet (name this "Admin Emails"), dedicated to listing the current email addresses for each administrator at each school. This will be used to tell Autocrat specifically where to send notification emails, depending on the school name selected by the user filling out the form. You will need 3 columns, and data under each column will each need to be manually filled in, as follows:
 - i. School name –list all your school names, one school per row. These need to be spelled exactly the same as your school names as listed in your form.
 - ii. Administrator emails –list all emails for admin in each building, combining them in a single cell on the row for that building. In cases with multiple admin per building, you will separate each address within the cell with EXACTLY 1 comma and 1 space
 - iii. Folder reference –list the specific web address reference for each school's Google Drive folder, which can be found in the address bar when looking at each folder in a web browser. The reference you need to copy will be a combination of gibberish-looking letters and numbers, as noted in bold, following the word "folders/" in the following sample address (only copy the part in bold into your administrator email spreadsheet)

https://drive.google.com/drive/folders/14gEHDiHTi_-Gra7o4Dfgpsc2gshTrdnv

- d. Run a practice submission of your form and see if the data imports to your sheet. If it works, you'll also have new column headers that are named to match each question on your form.
- e. In your current year spreadsheet, you'll need to add 3 more columns beyond those that import from the form automatically upon form completion, each one with a complex formula in row 2. The intention is to pull in all the needed reference data from your extra sheet you just created that contains administrator emails and folder references. Ultimately, you will want admin emails and folder references to automatically populate onto the same spreadsheet, within each new row of data that is added to your current year sheet, each time a new form response is submitted. This can be accomplished using a Google Sheets trick called an "arrayformula", which auto-applies any given formula to all newly added rows in a given column.

First create 3 new columns to your current year sheet, just to the right of your last column that has data (likely AL, AM, and AN). Label your 3 columns by writing the following in the first row of each column, respectively: "Folder where letter is saved", "Administrator Emails", "Date of Report".

- i. For the first new column, add the following formula on row 2:
`=ARRAYFORMULA(VLOOKUP(H2:H, 'Admin Emails'!A3:C, 3, false))`
 "H" should refer to the column your school names are listed, this imports your folder reference from the other sheet
- ii. For the second new column, add the following formula on row 2:
`=ARRAYFORMULA(VLOOKUP($H$2:$H, 'Admin Emails'!$A$3:$B, 2, false))`
 "H" should refer to the column your school names are listed, this imports your administrator emails reference from the other sheet
- iii. For the third new column, add the following formula on row 2:
`=ARRAYFORMULA(LEFT(A2:A, 10))`
 This formula copies the date from your first column (from the data field Google adds automatically, telling you when a form was submitted) without also copying the time
- f. Create your parent letter templates by using the Create button to make a new Google Doc. You can word this letter however you like, but it should include the legally-required data fields from your form. Generally, each data field you pull into this letter will be included in your template by typing exactly whatever each data field is named within two less-than and greater-than signs. For example: <<Date of Incident>>. Autocrat will use these templates to auto-create customized letters to notify parents for each incident, based on the data in the form response.

You will make 3 of these templates, once for instances of isolation, another for restraint, and another for instances of combined isolation+restraint. Please name each one clearly, as you'll need to be able to find them in the next step.

[Please see this sample template](#)

- g. Open your Autocrat settings by opening your spreadsheet, selecting "Extensions" at the top, then Autocrat, then Open. Hit the button for "New Job". You'll be doing

this three times, one “job” for instances of isolation, another for restraint, and another for instances of combined isolation+restraint. For each job, enter the following:

- i. Job name - “Parent Letter for Documentation of Restraint (only)” (or Isolation (only) or Restraint and Isolation (both))
- ii. Choose Template - this means find your specific parent letter template for this job. Select the button for “From drive” then find and select your already-created parent letter template.
- iii. Map source data to template –this means you should align each of your “<< >>” included in the letter template, with the specific question name from your actual form. Generally these will have the exact same name, so <<Date of Incident>> will map to the column in your spreadsheet for “Date of Incident”.
- iv. File settings - enter a file name that incorporates some details from each form submission, so that each new letter created will have a clear name, such as:

Restraint documentation for <<Student Full Name>>, created by
<<Reporting Staff Name>>

Leave the setting for Type as “Google Docs” and for “Output as”, select Multiple output mode

- v. Choose destination folder(s) –leave this blank. This would be used only if you wanted all your parent letters to go to the same folder, but you will instead use a dynamic folder reference to sort them into separate folders in the next step
- vi. Add dynamic folder reference –select “+ Reference”, then select the column for << Folder where letter is saved >>
- vii. Set merge condition –select “Add condition”. Under Column, select “Did the incident involve restraint, isolation, or both”, and for “equals” write the appropriate answer for this job (e.g. “Restraint” or “Isolation”)
- viii. Share docs & send emails
 1. Share doc? Select Yes
 2. Share Doc as: PDF
 3. Allow collaborators to re-share - Yes
 4. Send from generic no-reply address - Yes

In email template

To: <<Administrator Emails>>, <<Email Address>>

Cc: any other email you want CCed on your reports, e.g. a data secretary

Bcc [blank]

Reply to [blank]

Email Title: Notification of Use of Student Restraint

Email Content: (sample)

Thank you for submitting your documentation for student restraint or isolation. Please see the attached PDF for your formal written documentation to provide to parents. This report must be either emailed, or printed and mailed to parents within 48 hours of the incident.

You should also have received a separate email with the full documentation of all form responses --please forward that on to your building's administrators.

If you require a translation of your parent letter, you may download the attached PDF from this email, then upload it to the following address:
<https://translate.google.com/?sl=en&tl=es&op=docs>

- h. Add/remove job triggers - Run on form Trigger (yes); Run on time trigger (no)

Hit SAVE, then repeat this process for Isolation (only), and Isolation and restraint (both), to ensure you have all 3 jobs complete.