

Filter Updates

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September 26, 2025

We wanted to inform our users that we recently made new updates to the filters on document list pages! These new filter options increase the granularity of what users can search for and will help users find what they are looking for faster.

- Documents Filter
- Programs Filter

Documents Filter

The **Show: All** filter on document list pages has been replaced by a new **Documents** filter. The previous **Show: All** filter enabled users to search for documents that were complete, incomplete, owned by them, etc. However, this was not a selectable list and only allowed users to search based on one parameter at a time.

The new **Documents** filter is now selectable, meaning users can search for documents with various combinations of characteristics. For example, users can search for incomplete documents that they own.

The screenshot shows a dialog box titled 'Documents' with three tabs: 'Documents', 'Forms', and 'Programs'. The 'Documents' tab is active. Inside the dialog, there are links for 'Select all' and 'Clear'. Below these are three filter sections: 'Status' with checkboxes for 'Complete' (unchecked) and 'Incomplete' (checked); 'My Permission' with checkboxes for 'Owner' (checked) and 'Not Owner' (unchecked); and 'Deleted' with a checkbox for 'Deleted' (unchecked). At the bottom right are 'Cancel' and 'OK' buttons.

The **Documents** filter includes options to search based on whether the document:

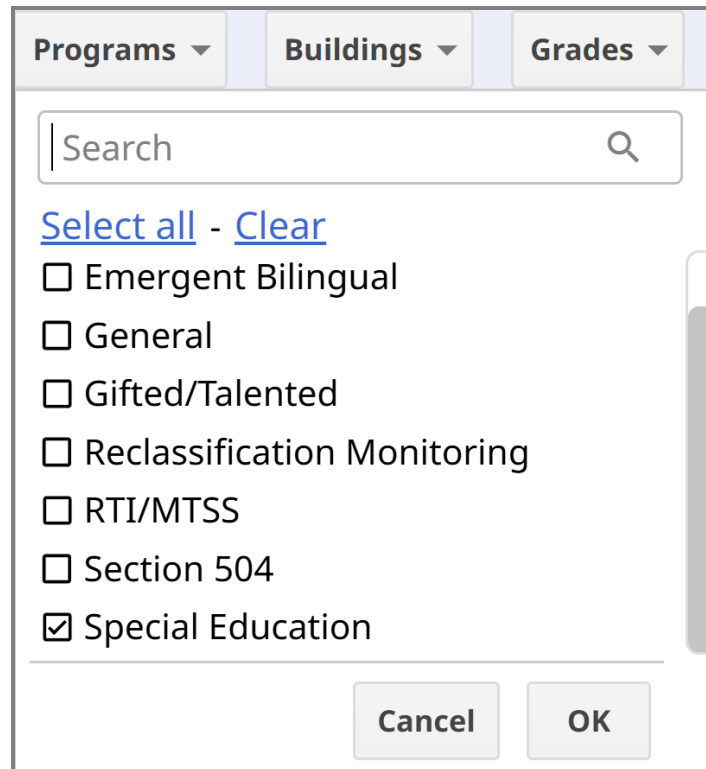
- Is complete/incomplete
- Is owned by them/not owned by them
- Is deleted/not deleted
- Belongs to an active student/inactive student

💡 Tip We previously added an Inactive Students checkbox on document list pages in order to search for documents associated with inactive students. However this checkbox has been removed in favor of the Inactive/Active student option in the **Documents** filter.

💡 Tip This new filter also makes it possible to view deleted and not deleted documents simultaneously, which was previously not an option.









Programs Filter

We previously already had a **Programs** filter on the **Students / create new** page that allowed users to search for students based on which special programs they were enrolled in. Now we also have a **Programs** filter on document list pages that allows users to search for documents based on which special program they are associated with.



The screenshot shows a 'Programs Filter' dialog box. At the top, there are three tabs: 'Programs' (selected), 'Buildings', and 'Grades'. Below the tabs is a search bar with the placeholder text 'Search' and a magnifying glass icon. Under the search bar, there are links for 'Select all' and 'Clear'. Below these links is a list of programs with checkboxes: 'Emergent Bilingual', 'General', 'Gifted/Talented', 'Reclassification Monitoring', 'RTI/MTSS', 'Section 504', and 'Special Education' (which is checked). At the bottom right of the dialog box are 'Cancel' and 'OK' buttons.

Additionally, each document listed on a page now includes a color coded icon that indicates which special program the document is associated with. This will help users find what they are looking for faster, especially if they are looking at documents for a student who is participating in more than one program.

<input type="checkbox"/>			Referral for Initial Evaluation	Owner Caitlin Example
<input type="checkbox"/>			Special Education	Location of Reclassification and Approval of Exit - Transitional Bilingual (rev 11/23)
<input type="checkbox"/>			Parental Notification on Student Progress - Bilingual	Owner Caitlin Example Date 06/10/2025 LP
<input type="checkbox"/>			LPAC Annual Review	Owner Caitlin Example LPAC 03/03/2025 Decision English proficient Placeme

Tip When you hover over one of the color coded program indicators, a popup will specify which program the document is associated with.

