Data Collection Forms-Setup Guide

Distribution: CO Users



Step-by-Step Guide

To Modify the Sections Included on the Form

1. Click on the Maintenance tab. Locate the Referral Information section by using the index button (file folder icon) or scrolling.



- Click on the Data Collection Sections link.
- 3. For each section, click the check box in the Elementary column for the section to be included on the Request for Assistance-Elementary Level. Click the check box for the Secondary column for the section to be included on the Request for Assistance-Secondary Level.



- a. The default is all sections will be checked to Show for each version of the form.
- 4. Click Save to save the selections made and return to Maintenance or click cancel to delete your changes and return to Maintenance.



To Add District Text or Values

1. Click on the Maintenance tab. Locate the Referral Information section by using the index button (file folder icon) or scrolling.



- 2. Click on the desired link to enter district specific statements or values.
- Click Add.
- 4. Type in the district specific statement or value desired.
- 5. Click Save.

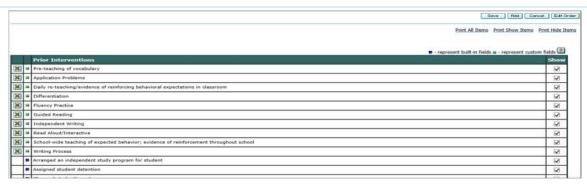
To Hide Built-in Text or Values

1. Click on the Maintenance tab. Locate the Referral Information section by using the index button (file folder icon) or scrolling.



- 2. Click on the desired link.
- 3. In the Show column on the far right side of the screen, uncheck the value to be hidden.





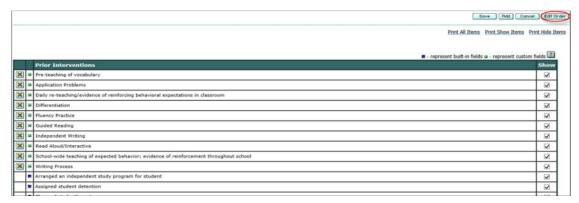
Click Save.

To Edit the Order of Text or Values

1. Click on the Maintenance tab. Locate the Referral Information section by using the index button (file folder icon) or scrolling.

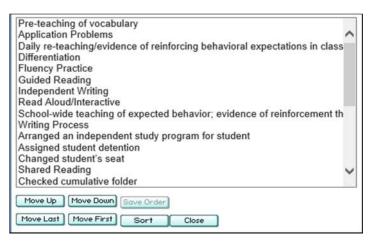


- 2. Click on the desired link.
- 3. Click the Edit Order button.





4. Click the desired value and then click one of the navigation buttons to move the value to the desired order.



- 5. Click Save Order.
- 6. Click Save to return to Maintenance.