Using the Data Collection Forms

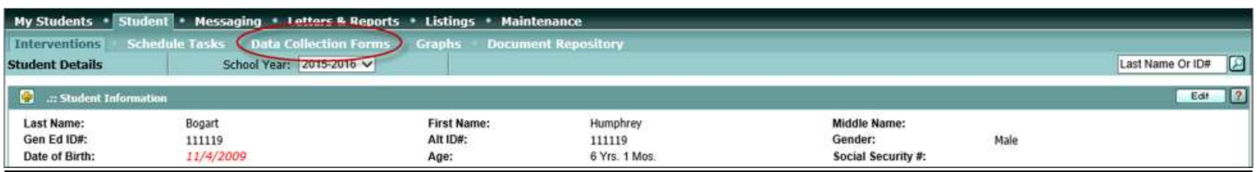
Distribution: All Users

Step-by-Step Guide

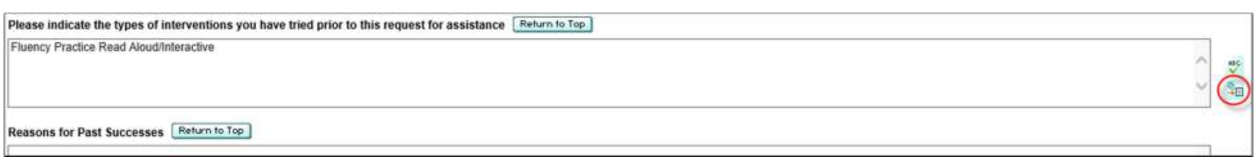
To Select and Complete a Form

1. Search and Click on the student name from the My Students screen.

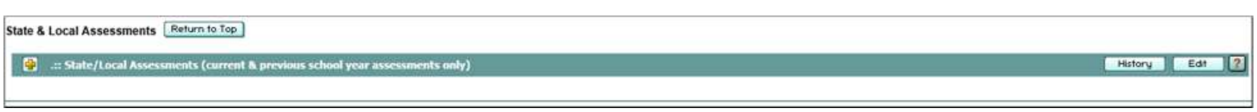
2. Click the Data Collection Forms sub tab.



3. On the Select a Template screen, select the desired template. The default is Request for Assistance-Elementary Level.
4. Click Add.
5. Click on the drop down menus to add specific data to the form for the student.
6. To add text in any of the sections that display, click in the text box to type in the desired statements and/or click the insert text button on the far right side of the box to choose district customized text. Click the spell check icon on the far right side of each text box to spell check your entry.

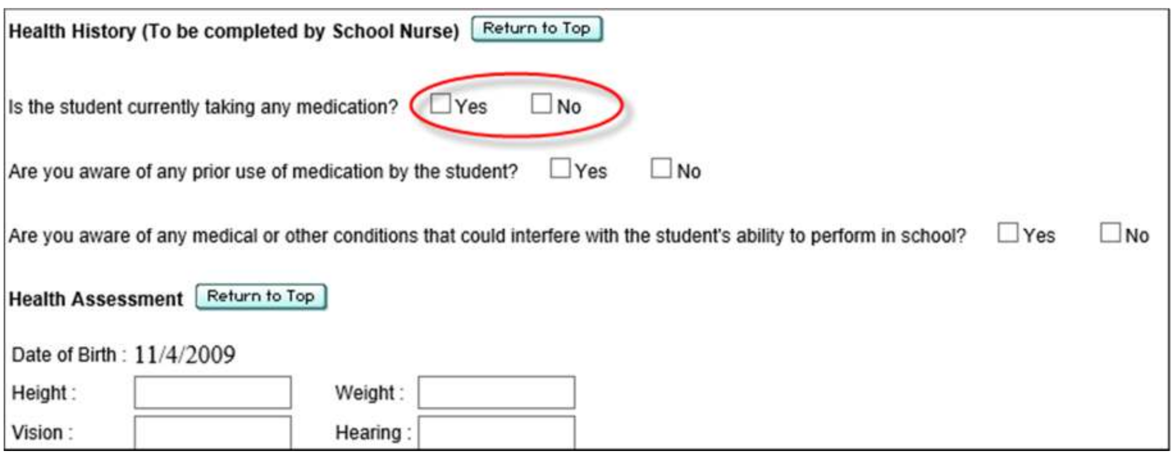


7. To add State/Local Assessment data, go to that section and click edit. You may select and add assessment data for the student. Any previously added assessment data for the student in the current and last school year will display.

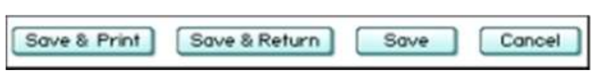


8. Click the Go To drop down and make a selection to easily and quickly navigate to a desired section of the form.

9. Some fields require a check be placed in a Yes or No box. Click in the desired box to indicate your choice.



10. When finished, click Save & Print to automatically save the entries made and print the form. Or click Save & Return to save the data entered and return to the Data Collections Form screen. Or click Save to save the data entered and remain on the current screen. Click Cancel to discard any data entered or changes made and return to the Data Collection Forms screen.



To Email an Alert regarding a Form

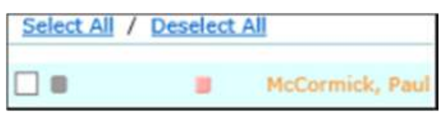
- ***Please note:*** *The system must have your email address on file, as part of your user account prior to using this feature. To check that your user account has a valid email address associated with it, click on My Information link near the Logout button. Click My User Account and enter an email address if none exists or make any corrections. Click Save.*

1. Search and Click on the student name from the My Students screen.

2. Click on the Data Collection Forms sub tab and then click the envelope icon to complete the email form.
3. The Subject line is auto-populated with the name of the selected Request for Assistance form but can be edited; the date that the form was added to the student record also displays.
4. To add recipients, click Add Individual button.
5. If you would like a BCC to also be sent, click the BCC checkbox.
6. In the text box at the bottom of the screen, you may type in any message or special instructions regarding the form.
7. Click Send. A copy of the email will also be sent to the user completing the email function.

To Edit a Form Previously Added

1. Search and Click on the student name from the My Students screen.
   a. If the student has a form already added or started, there will be a pink indicator button in front of their name. To quickly access the Data Collection Form already added, simply click the pink indicator button. Proceed to Step 3 below.



2. Click on the Data Collection Forms sub tab.
3. Click on the edit pencil for the desired form to be edited.
4. Make any changes, add new text or delete any data desired to the text sections you previously added. Click the Edit button to make changes or add more text. Click the Delete button to remove your previous text. You may not edit or delete the text that may have been entered previously by other staff/users.

5. When finished, click Save & Print to automatically save the entries made and print the form. Or click Save & Return to save the data entered and return to the Data Collections Form screen. Or click Save to save the data entered and remain on the current screen. Click Cancel to discard any data entered or changes made and return to the Data Collection Forms screen.

To Print a Form Previously Added

1. Search and Click on the student name from the My Students screen.
    a. If the student has a form already added or started, there will be a pink indicator button in front of their name. To quickly access the Data Collection Form already added, simply click the pink indicator button. Proceed to Step 3 below.

2. Click on the Data Collection Forms sub tab.
3. Click the printer icon next to the desired form. This will display the Letters & Reports screen.

4. The Data Collection Form will be checked off. Click Process.
5. On the prompts screen, make the desired selections for the fields displayed.
6. Once processed, click the preview button to view or print the form.