

TRAX Survey Module

Reference Guide for Case Managers

Student	Add	?	Surveys
k Jingles		+	2012-13 (1 of 5)
Jimmy Jones		+	2012-13 (1 of 3)
Lou Perez		+	2012-13-3

New Survey: starts a new survey for the student.

Date: the most recent “current” survey is at the top

X of Y: number of takers that have completed the survey out of the total number of takers.

When a student’s + is opened up, the new survey is always on the bottom and the list is oldest to newest created (on top).

Survey “How to”

1. Click on “new survey” in the column next to the student you want to complete a survey on.
2. Choose the survey template, (to preview the survey skills for the chosen template, click Preview), rename the survey, type the IEP anniversary year, put in survey due date, and choose the survey scale, then click submit to go to the “manage takers” screen.

Lou Perez | **New Survey** [Help](#)

Submit **Cancel** **Close**

*Template: **Preview** ?

*Survey Name:


*School Year (YYYY-YY):

Due Date:


*Default Scale:

Submit **Cancel**

[Email Takers](#)
[Print Survey](#)
[View Survey](#)
[Modify Survey](#)
[View Results](#)
[Survey Content](#)
[Survey Settings](#)
[Close](#)

Selected Survey Takers 

Action	Name	E-Mail	Role	Status
Edit Del	Jensen, Roberta	rjensen@rj.com	My Special Ed Cases	Take Survey
Edit Del	perez, ggg	ggg@mnli.com	Parent	Take Survey
Edit Del	Perez, Lou		Student	Take Survey
Edit Del	Spudic, Autumn	hfkhd@kdsfk.com	My Special Ed Cases	Take Survey
Edit Del	Spudic, Kim	kspudic@erdc.k12.mn.us	My Special Ed Cases	Take Survey
Add				

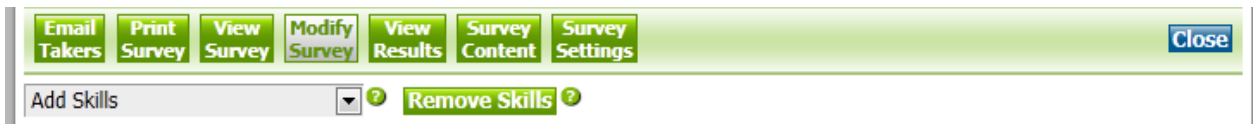
Select Takers from the following Groups 

Sel	Name	E-Mail	Role
<input type="checkbox"/>	Family		
<input type="checkbox"/>	Transition Survey (2012-13-3)		
<input type="checkbox"/>	Transition Survey (2012-13)		
<input type="checkbox"/>	Student's Teachers		
<input type="checkbox"/>	Demo School Teachers		
<input type="checkbox"/>	Staff		

- The survey comes in with the student, parents and case manager loaded to take the survey. In order to *add other survey takers*, click the + in front of the groups and **check the box** next to the takers you would like to add. To add a taker not on the list, **click the add button under “selected survey takers”** and type the taker’s name, email, and choose the taker’s role.

Under **Status a taker may take the survey at any time by clicking [Take Survey](#).

4. **Modify Survey** is optional, but must be done prior to *anyone* taking the survey. To modify the current selected survey, click on the Modify Survey button.



To add a skill(s) choose from the drop down menu
Click on the Remove Skills button to select skills to remove from this survey.

5. The **Survey Settings** button allows the teacher to edit the Survey Name, IEP Anniversary Year/School Year, Due Date, Scale, and/or Status of the Survey.
* **Note:** The scale can't be changed if *anyone* has completed the survey.
* The Survey can be deleted by clicking the "Delete Survey" button.
6. **View Survey** is to see the survey as the survey taker will see it.
*Edits can't be made to the survey on the "view survey" screen.
7. Click **Print Survey** to create a PDF of the survey to give or mail to survey takers. * When the completed survey is returned, the special education teacher may enter the results into that survey taker's survey by clicking on **Take Survey** by that person's name.

8. Email the survey to selected team members by clicking Email Takers.

Enter Subject or choose template: ?

Enter Message or choose template: ?

Due Date: ?

Select Recipients: [All](#) [None](#) [Uncompleted](#) ?

	Name	E-Mail	Role	Status
<input checked="" type="checkbox"/>	Jensen, Roberta	rjensen@rj.com	My Special Ed Cases	
<input checked="" type="checkbox"/>	perez, ggg	ggg@mnli.com	Parent	
<input checked="" type="checkbox"/>	Spudic, Autumn	hfkhd@kdsfk.com	My Special Ed Cases	
<input checked="" type="checkbox"/>	Spudic, Kim	kspudic@erdc.k12.mn.us	My Special Ed Cases	

1. Choose the subject of the email by selecting from a template in the dropdown.
2. Choose the message of the email by selecting from a template in the dropdown.

**Edit or add to the template in the gray box(es).*

3. Enter the survey due date.
4. Select the recipients by checking the box in front of their name.
5. Click **Send**.

**The assigned teacher will receive an email verifying the survey takers that were emailed a survey.*