

FY27 Custom Forms Summer Training

WINNING WITH
CAMPUS

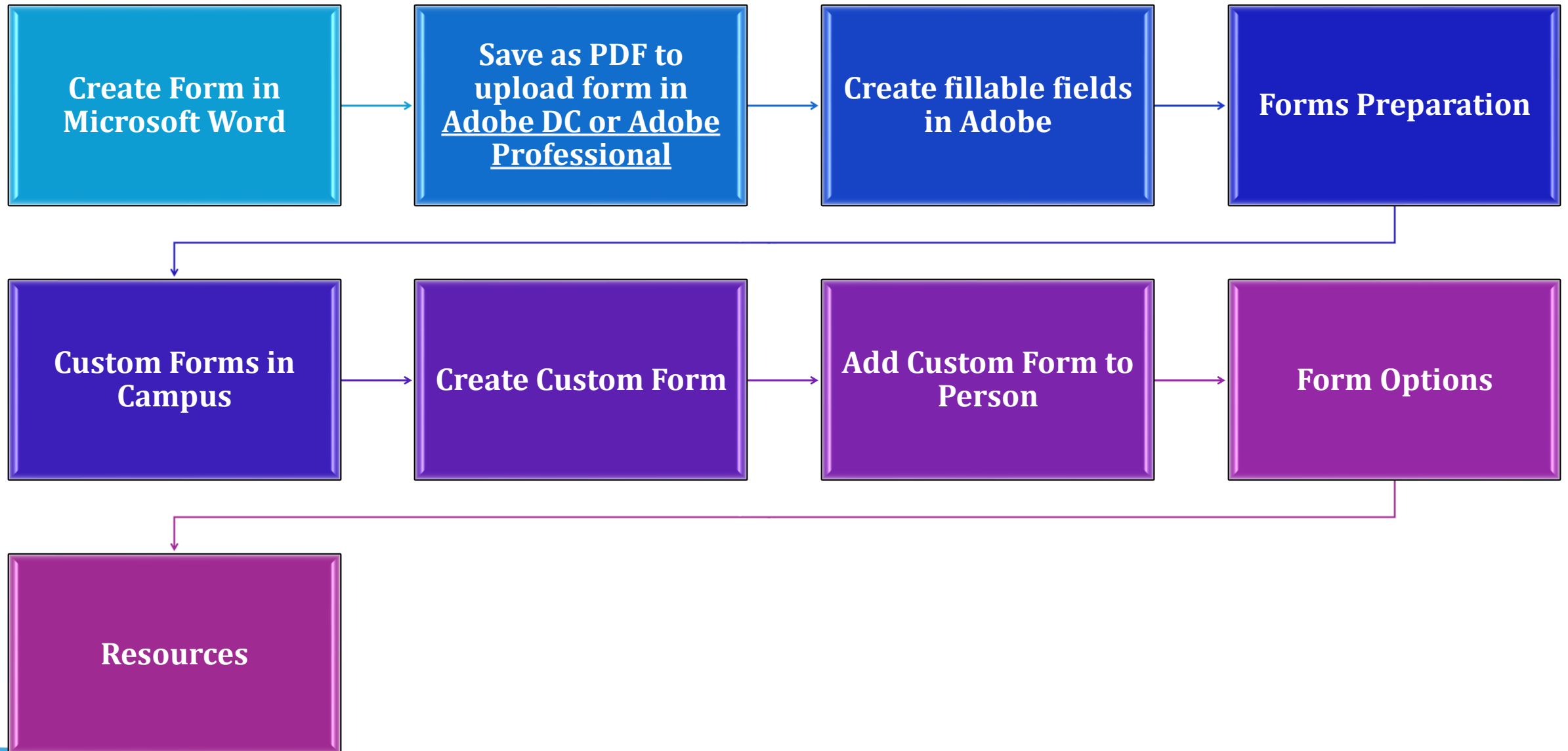


TUESDAY, JULY 28TH
TRAINER – DAIRA RICHEY

What is a Custom Form?

	<i>The Custom Forms tool uploads and manages documents that can then be linked to a person's record. Custom Forms can be setup to pull information directly from campus and/or have data entered into a form queried and reported in ad hoc.</i> <i>There are 3 types of Forms that can be created: Blank Form, Interactive Form and Interactive Form with Database Table.</i>

Agenda



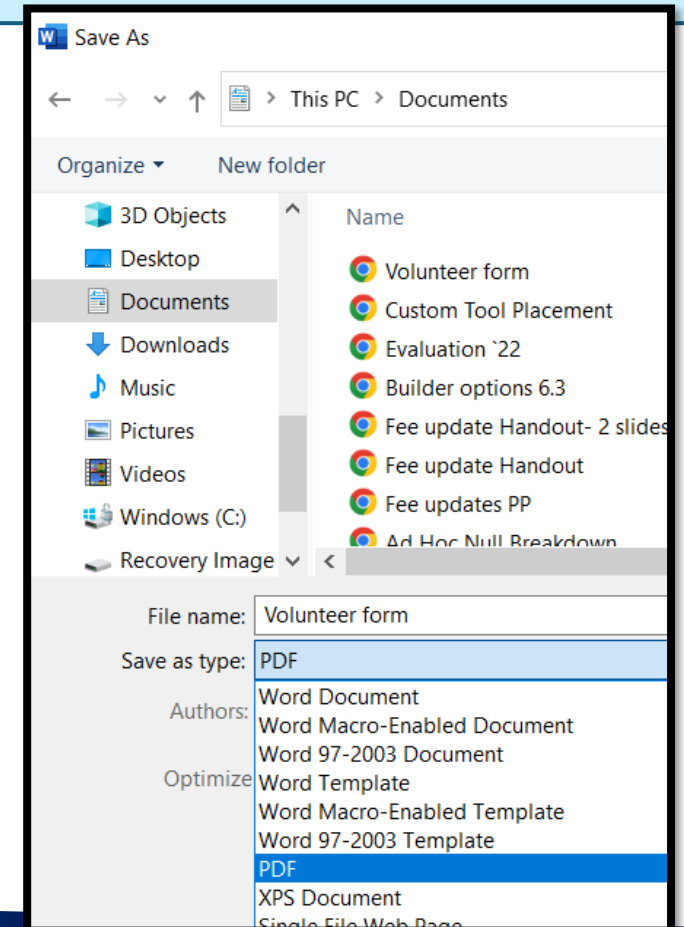
It is recommended that the creation and editing of the document be completed BEFORE converting the form to PDF (*It is much easier to edit on Word than through Adobe*). Be sure to remove extra lines, spaces, boxes, etc.

Note: Google Docs is not supported

Saving your document as a PDF:

Once the document has been created and has all the necessary edits. Click File > **Save As** > Select where you would like the file to be located.

Once the Save As box populates, name the file and click the dropdown next to **Save as type:** Select PDF and click Save.



PDF Details

Only PDFs created using **Adobe Acrobat Professional or Adobe DC** are supported for Custom Form creation.
File > Open > Select created PDF

Home Tools Volunteer form..pdf x

Find your tools here

- Create PDF
- Edit PDF
- Export PDF
- Comment
- Organize Pages
- Enhance Scans
- Protect
- Fill & Sign
- Prepare Form

Parent Volunteer Form

First Name _____

Last Name _____

Student Name _____

Address _____

Zip Code _____ Cell Phone _____

Email _____

I am interested in volunteering for the following types of activities:

- Zoo Chaperone
- Classroom helper
- Office helper
- Library helper
- Event organizer
- Chairperson
- Communications
- Other: _____

Once you open
the file in Adobe,
Click on the
Prepare Form
Tool to
automatically
add text boxes to
your PDF
document.

Home Tools Volunteer form..pdf x

Prepare Form

Parent Volunteer Form

First Name

Last Name

Student Name

Address

Zip Code Cell Phone

Email

I am interested in volunteering for the following types of activities:

- Zoo Chaperone
- Classroom helper
- Office helper

Important To Note:

- ❖ Use supported fonts (*Helvetica, Times New Roman, Times Roman, Courier*) as using unsupported fonts may cause text to be unreadable or will be converted to Times Roman.
- ❖ Only use multi-line text fields for fields that should have multiple lines of text (*not to be used on single line text*).
 - Users should either select a smaller font for single line text or use auto-font for those fields that should not print on a second page.
- ❖ An interactive Custom Form can contain the following elements: Checkboxes, Radio Buttons, Text Fields, Dropdown lists, Date fields, Number fields, Watermarks
 - Unsupported Fields: List Boxes, Signature Fields, and Bar Codes. Also, admins should remove all custom print and save buttons on the form.
- ❖ Be sure to verify Properties on the Text boxes that Adobe has created for you to ensure these suggestions are showcasing correctly for your fields.
- ❖ Try not to use 'Scroll long text'

Double click or Right click on a field to view the Properties. Here you can edit the Field Name (*General*), Font/Font Size (*Appearance*), View Multi-line, Spellcheck selections (*Options*), etc.

Note: When the Field Name is added using an ad hoc filter or Reserved Name (slide:40), the data will be populated from existing information in Campus when the document is attached to a student.

Prepare Form ▾

Parent Volunteer Form

First Name

Last Name

Student Name

Address

Properties...

Rename Field...

Set as Required Field

Prepare Form ▾

Parent Volunteer Form

First Name

Text Field Properties

General Appearance Position Options Actions Format Validate Calculate

Name: First

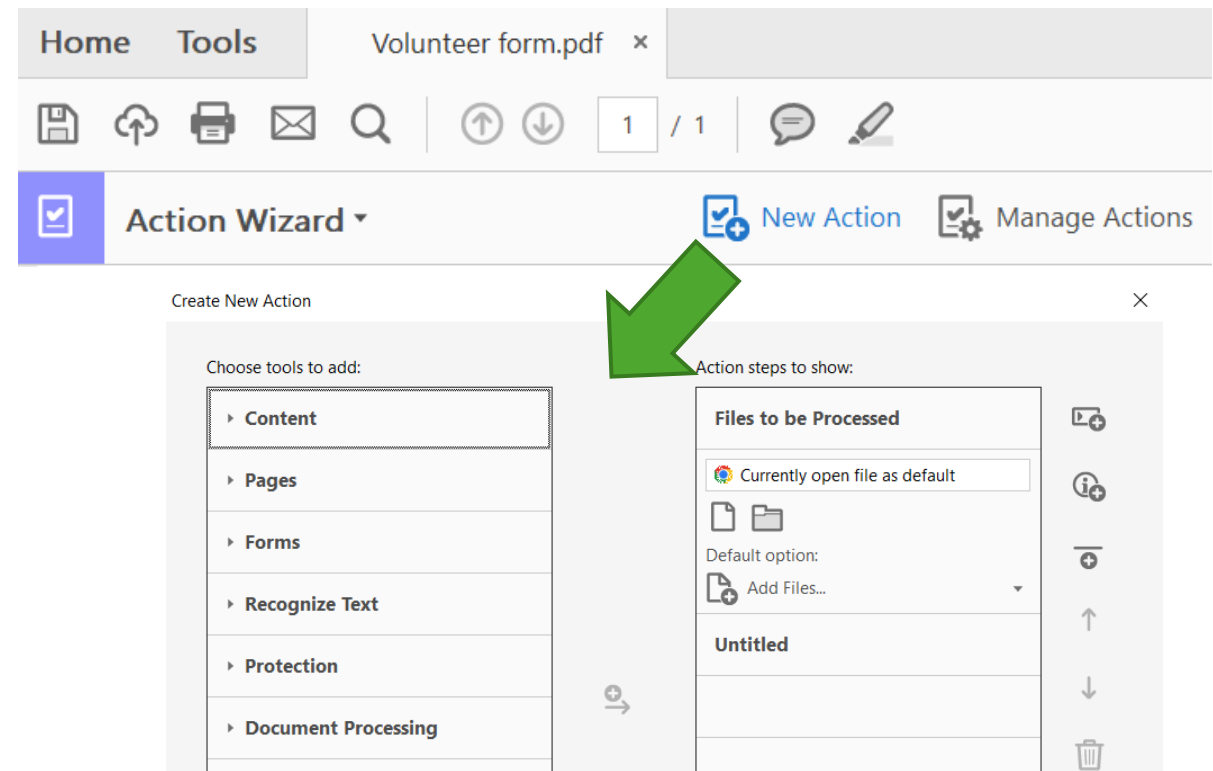
Tooltip: First

Action Wizard

Anytime you create a Custom Form Document, it is recommended to run the following Action Wizard. This will optimize the form to reduce size, eliminate unexpected metadata and hidden information that may have come from a previous application like Word.

Follow the following steps to create a customized Action in the Action Wizard

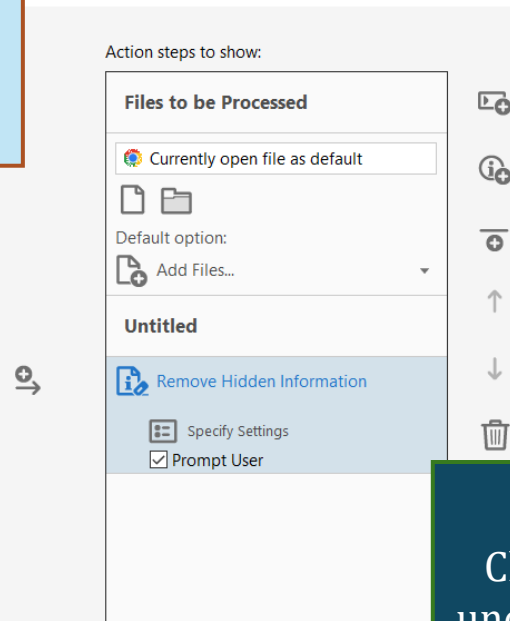
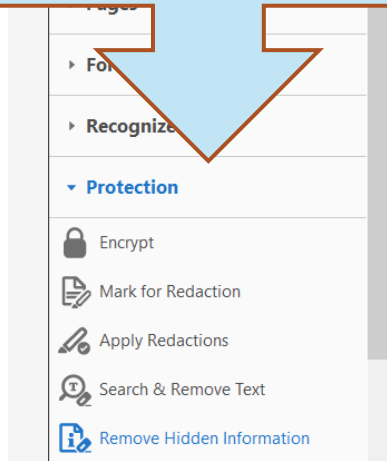
- 1) Click on Tools > Action Wizard
- 2) Select New Action to display the 'Create New Action' menu



Action Wizard

Step 3:

Expand Protection and double click 'Remove Hidden Information'

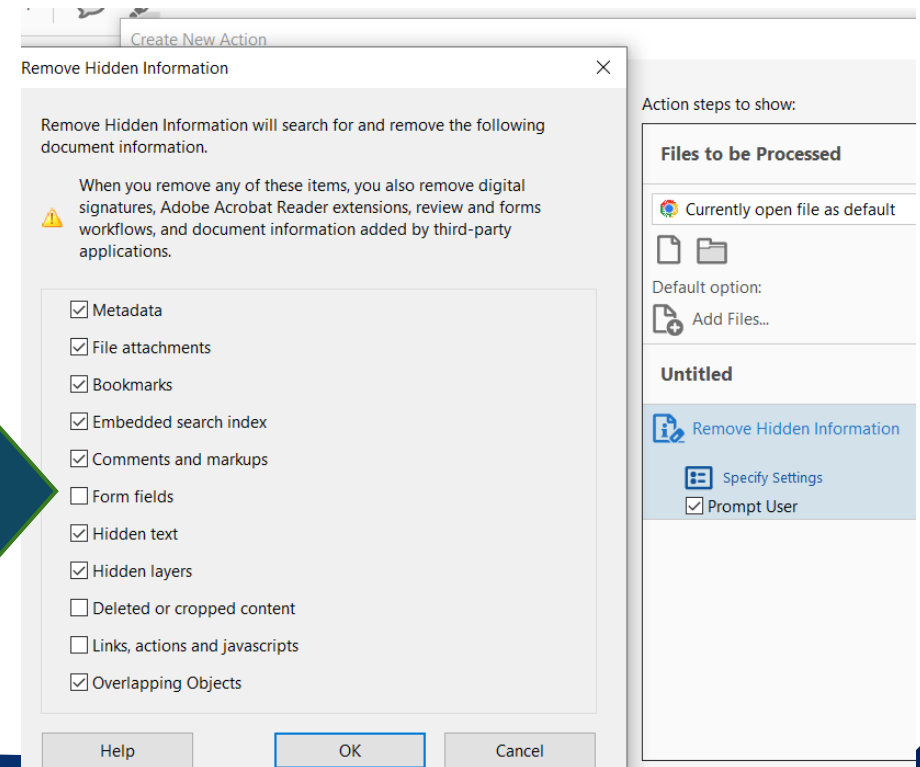


Step 4:

Click 'Specify Settings' and uncheck the following options:

- Form Fields
- Deleted or Cropped Content
- Links, Actions, and JavaScript

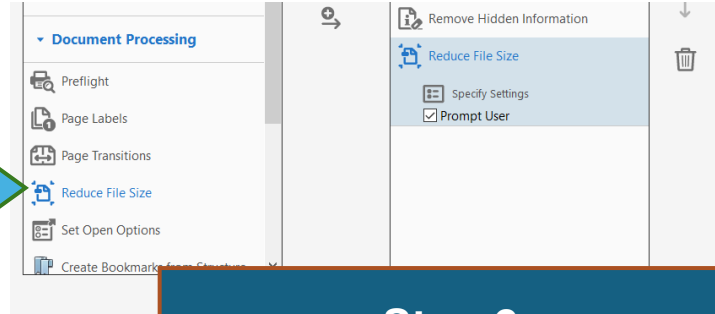
Click OK once complete.



Action Wizard

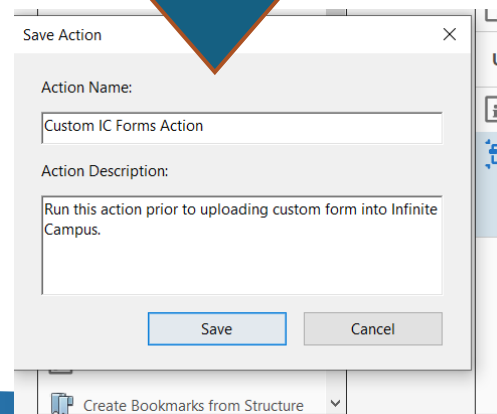
Step 5:

Expand Document Processing and double click 'Reduce File Size'



Step 6:

Click **Save** to populate the Save Action box where you will Name your action and enter a Description (Optional).



ACTIONS LIST

- ☒ Custom IC Forms Action
- ☒ Make Accessible
- ☒ Archive Documents
- ☒ Publish Sensitive Inform...

NOTE:

Once all the form fields are added and formatted as desired, run your customized Action on the completed form and save the resulting file. We are now ready to upload and use this form in Campus!

Parent/Student Portal:

To display Form in the Portal and/or for eSignature(s), the Portal Preferences need to be marked for the module the form is located.

Portal Display Options

Display Options Template
School: META Elementary School Template: META Elementary School

Display Options

Enable tools and select display options for both the Campus Student and Campus Parent Portals (unless otherwise noted).

Expand All Collapse All

Module	Student	Parent
Academic Plan		
Access Log	✓	✓
Activity Registration	✓	✓
Assessments		
Assignments	✓	✓
Attendance	✓	✓

Path: System Settings > Portal Preferences > Portal Display Options

Relationships ★

Avalor, Elena M (Hallee) DOB: 05/08/17

Save New Non-Household Relationship

Relationships within the Cremeans **Primary Household Relationships

Name	Gender	Relationship	Start Date	End Date	Emergency Priority	Guardian	Mailing	Portal
Avalor, Katy	F	Mother	03/25/2016		1	✓	✓	✓

Path: Census > Relationships

For guardians to receive the eSignature request the **Guardian, Mailing, and Portal** checkboxes need to be marked.

Roster:

For a user to view a Custom Form, that has been marked 'roster' during the Form Upload step, the user must have **Read** tool rights for

- Student Information > General > Forms > Module > Custom Forms
- AND**
- Campus Instruction > Roster

Forms	All	Read	Write
Counseling	☐	☒	☐
Custom Forms	☐	☐	☐
Unlock	☐	☐	☐
Blank Forms	☐	☐	☐
Copy	☐	☐	☐
Override	☐	☐	☐
Health	☐	☒	☐
Custom Forms	☐	☒	☐

&

Tool Rights Teachers

Group Tool Rights Editor

Search Campus Tools

Enter text to search for matching tools...

Tool Rights

- Instruction ☐ All
- Overview ☒ All
- Students ☒ All
- Roster ☒ All

Tool Rights

Tool Rights
Forms

Tool Rights	
▶ Instruction	☒ All
▼ Student Information	☐ All ☐ Read ☐ Write ☐ Add ☐ Delete
▶ General	☐ All ☐ Read ☐ Write ☐ Add ☐ Delete
▼ General Student Administration	☐ All ☐ Read ☐ Write ☐ Add ☐ Delete
Custom Form Setup	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
Counseling	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
Health	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
PLP	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
Response to Intervention	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
Special Ed	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
Behavior	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
504 Plan	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
User Group Form	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete

The 'Student Information > General Student Administration > Custom Form Setup' Tool rights, grants the user access to the Forms Creation area.

Tool Rights
Forms

State Reporting	☒ All ☒ Read ☒ Write ☒ Add ☒ Delete
Forms	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
Counseling	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
Custom Forms	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
Unlock	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
Blank Forms	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
Copy	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
Override	☐ All ☐ Read ☐ Write ☐ Add ☐ Delete
Health	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
Custom Forms	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
Unlock	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete

The 'Student Information > General > Forms' Tool rights, grants the user access to the Forms on the Students Form area.

IMPORTANT NOTE:
Users who have rights to a form can view all data that may be pulled into that form, regardless if they have rights to that data or the tool it comes from.

Tool Rights
Forms

▼ Counseling	☐ All ☐ Read ☐ Write ☐ Add ☐ Delete
Counseling Contact Log	☒ All ☒ Read ☒ Write ☒ Add ☒ Delete
Access to Records Created By Other Users	☒ All ☒ Read ☒ Write ☒ Add
Counseling Documents	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
Custom Forms	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
Copy	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
Lock	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
Unlock	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
Document Upload	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
Lock	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete
Unlock	☐ All ☒ Read ☒ Write ☒ Add ☐ Delete

Each individual tool's rights, such as Counseling, Health, PLP, etc., function the same. However, custom forms rights must be selected for EACH modules.

Custom Module Setup

Used to create and manage organizational modules that store Custom Forms and/or Contact Logs.
Custom Forms can currently be created for the following:
Attendance, Counseling, Health, PLP, RTI, Special Ed.

Custom Module Setup ☆

[Student Information](#) > [General Student Administration](#) > [Custom Module Setup](#)

Custom Module Setup can be used to create a space for custom forms and/or a contact log with associated tool rights. Users must log out and log in to view the new module.

Carefully review the Module Name and associated tools as they cannot be changed once created.

Create Custom Module *

When creating a custom contact log, the words 'Contact Log' are automatically appended to the name entered here. The Display Name is limited to 36 characters.

National Honor Society

Ad Hoc Display Module Name *

Module name displays in Ad hoc and cannot contain spaces. There is a limit of 15 characters.

NHS

Tools *

(Selection cannot be changed)

☒ Contact Log

Use the fields below to indicate where the Contact Log should appear in the Main Menu. After a Custom Contact Log has been created it can only be moved using the Custom Tool Placement Editor.

Menu *

Select menu item

Student Information

Category *

Select category item

Custom

☒ Forms

Description

Description is limited to 500 characters.

This module stores National Honor Society information.

Custom Forms List

The Custom Forms tool is where form administrators upload and manage documents that can be linked to a person's record.

Custom Form Setup ☆ Student Information > General Student Administration > Custom Form Setup

↑ MODULE ⌵

MODULE	STATUS	NAME	VERSION	SEQUENCE	FORM TYPE	START DATE	END DATE	PUBLISHED...
(All) ⌵	(All) ⌵				(All) ⌵	mont... 📅	mont... 📅	
▼ MODULE: Activity								
Activity	ACTIVE	Angie Salo		0	Blank	02/25/2025		☐
Activity	DRAFT	Angie Salo test		0	Interactive with DB Table			☐
▼ MODULE: Behavior								
Behavior	ACTIVE	asdfasdf	1	0	Interactive with DB Table	01/29/2025		☐
Behavior	DRAFT	Tabledraft	1	0	Interactive with DB Table			☐
▼ MODULE: Counseling								
Counseling	ACTIVE	Interactive eSign Pushed		0	Interactive, eSign	03/25/2025		☒
Counseling	ACTIVE	Interactive Pushed		0	Interactive	03/25/2025		☒

New ⌵

Blank Forms

Custom Form Setup

Blank Form

Module (Required)
The module cannot be modified after saving.

Health

Name (Required)
Limit 50 characters.

Sports Physical Form

PDF (Required)
Max File Size: 4 MB

Select file...

 FY27 Physical Form.pdf
1.31 MB

Sequence
The order in which the form displays in the Custom Forms list and t

1

Start Date *

06/15/2026

End Date

month/day/year

Status
The Status is calculated based on the Start and End Date.

ACTIVE

Cancel

Save

Blank forms can **ONLY** be printed and are in the Forms tool.

1. Click down arrow next to New and select Blank
2. Select Module, Enter Name, Select File, Enter start Date (when form becomes active).
3. Optional: Enter an End Date for when the form becomes inactive.

Interactive Form

Step 1: Upload

1 Upload 2 Prepopulate Fields 3 Configure Table 4 Define Rules 5 Publish

Data entered into an interactive form with a database table can be queried and reported in Ad hoc. Users can enter data directly into the form using the interface using Ad hoc fields.

Module *
The module cannot be modified after saving.
Athens Training

Name *
Limit 50 characters.
Volunteer Form

PDF *
Max File Size: 4 MB
Select file...
Volunteer form.pdf

Display Custom Form on Portal
☒ Campus Parent
☒ Guardian eSignature Request
☒ Guardian Fill out the Form
☒ Campus Student
☐ Student eSignature Request
☐ Student Fill out the Form

Display PDF on Roster
☒ Roster

Sequence
The order in which the form displays in the Custom Forms list and the list of Forms available to attach to a person.
2

Status
The Status is calculated based on the Start and End Date, which is established on the Publish screen. Form administrators can preview draft forms attached to a person's Forms tool or Documents tool.
DRAFT

Overflow
Allow users to type beyond the limited space in a multi-line text field. Text may overflow to subsequent pages when printing.
☐

Comments
Enter any information regarding the uploaded form. Any information entered here is only visible from this tool. Limit 500 characters.

Instructions
Enter any instructions regarding this form. Instructions are visible for the user filling out the form for a person. Limit 500 characters.

Uploaded By
META Local SD

Cancel Save & Next >

Field	Description
Display on Portal	When the form is attached to a student and locked, a read only version displays on the Campus Parent and/or Student.
Guardian/Student eSignature	Sends a request for a signature (Not available on Documents Tool and cannot be queried in Ad hoc).
Guardian/Student Fill out Form	When this option is marked a request for data entry and signature is sent to the student and/or parent on their Portal accounts.
Display on Roster	Allows a PDF version of the Custom Form to display on the Roster when the form is locked.
Overflow	When marked, users can input text into multi-line text fields beyond the limit of the field's space and will print on subsequent pages
Comments	A text field used to enter details for any information regarding the uploaded file (comments are only visible within this tool and cannot use: &, # or %).
Instructions	Text instructions for the user attaching the form to a person's record.

Interactive Form

Step 2: Prepopulated Fields

This is an optional step and can be completed at any time *(even after a form is Active and attached to a person)*. This step is used to map Ad hoc fields that pull data from Campus into the form to reduce the amount of data entry when a user fills out a form.

The screenshot shows the 'Prepopulate Fields' step (Step 2) of a form builder. At the top, a progress bar indicates five steps: Upload, Prepopulate Fields (active), Configure Table, Define Rules, and Publish. Below the progress bar, a form titled 'Parent Volunteer Form' is displayed. The form has several input fields: 'First Name' (with a 'First' label), 'Last Name' (with a 'Last' label), 'Student Name' (with a placeholder '[student.firstName] [<SPACE>] [student.lastName]'), 'Teacher Name' (with a 'Teacher' label), 'Date' (with a 'Date10_af_date' label), 'Cell Phone', and 'Email' (with an 'Email' label). A 'Form Field Properties' dialog box is open on the right, showing the 'Ad Hoc Fields and Text' section with the text 'student.firstName' and 'student.lastName' mapped to the form fields. The dialog also shows 'Instructions', 'Caution', 'Form Field Name' (Student), and 'Data Type' (Text). Below the form, there is a section titled 'I am interested in volunteering for the following types of activities:' with a checkbox labeled 'Zoo Chaperone'.

Upload Prepopulate Fields Configure Table Define Rules Publish

Parent Volunteer Form

First Name First

Last Name Last

Student Name [student.firstName] [<SPACE>] [student.lastName]

Teacher Name Teacher

Date Date10_af_date Cell Phone

Email Email

Form Field Properties

Ad Hoc Fields and Text

student.firstName

<SPACE> student.lastName

Instructions

Caution

Form Field Name Student

Data Type Text

Cancel OK

I am interested in volunteering for the following types of activities:

☐ Zoo Chaperone

Interactive Form

✓

Configure Table

4

Define Rules

5

Publish

Database Table Designer

Table Name

Page 1

AD HOC NAME	DB TYPE i	DB LIMIT	FIELD TYPE
Parent_first	varchar	300	Text
Parent_last	varchar	300	Text
student	varchar	300	Text
Teacher	varchar	300	Text
completion_d	date		Date
Parent_cell	varchar	15	Text
parent_email	varchar	300	Text
zoo	varchar	3	Check Box
classroom	varchar	3	Check Box

First

Last

stName] [<SPACE>] [student.I

ourseSection.teacherDisplay.1

Cell Phone

Email

following types of a

Step 3: Configure Table**

This step defines the table name, column names, and character limits for each field on the form. Once the form is published, the table is created, and any data entered on the form for a person can then be reported in Ad hoc.

Note: Once the table is published, the details on this screen cannot be edited, and becomes read-only.

Interactive Form

Step 4: Define Rules

Rules added by the Form administrator must be followed when a user fills out the form for a person. For forms sent to Campus Parent/Student to be filled out, this screen is also used to define which user can fill out each field.

This is an optional step and can be completed at any time, even after the form is Active and Attached to a person.

The screenshot shows the 'Define Rules' step (4) of the Interactive Form configuration process. The progress bar at the top indicates the following steps: 1. repopulate Fields (checked), 2. Configure Table (checked), 3. Define Rules (current step, highlighted with a blue circle), and 4. Publish (5).

On the left, a preview of the form titled 'Teacher Form' is shown with the following fields: Parent_first, Parent_last, student, Teacher, and a section containing Cell Phone and Parent_cell.

On the right, the 'Field List' table defines the rules for each field:

Field	Staff	Portal	Rule
Parent_first	☐	☒	
Parent_last	☐	☒	1 RULE
student	☐	☒	
Teacher	☒	☐	
completion_d...	☐	☒	
Parent_cell	☐	☒	1 RULE
parent_email	☐	☒	

Interactive Form

The screenshot displays a web application interface. On the left, a vertical list of roles is shown, each with a small icon and a label: 'Office helper', 'Library helper', 'Event organizer', 'Chairperson', 'Communications', 'Other: other_details1', and 'Other: other_details2'. The 'Other: other_details1' item is highlighted. To the right, a 'Rule Builder' panel is open. It contains the following fields: 'Form Field Name' with the value 'other_details1', 'Select Rule Option *' with a dropdown menu showing 'is required when', 'Select Another Field *' with a dropdown menu showing 'other1 (value: Yes)' and the text 'is filled', and a 'Rule Description' field containing the text '"other_details1" is required when "other1 (value: Yes)" is filled'. At the bottom of the panel are 'Update' and 'Cancel' buttons. Below the panel, there are navigation buttons: '< Previous', 'Cancel', and 'Save & Next >'.

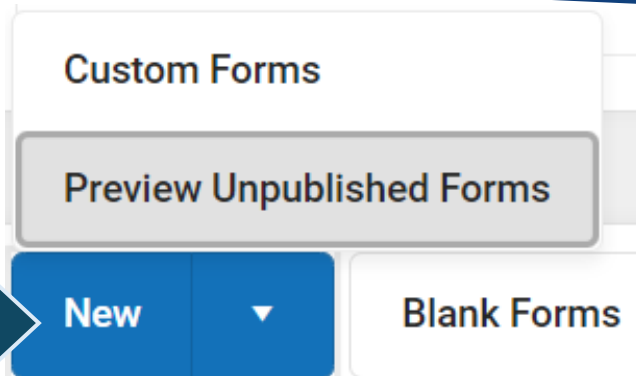
Define Rules cont.

Click **Add** to create a rule for the field. The **Rule Builder** will display. The Data Type of the field determines what type of rule can be created for the field (*Available Rules include: Required, Conditional Required, Comparative Date Rules, Comparative Number Rules*).

Once you verify the rule is correct, click **Update**.

Interactive Form

1. Click the dropdown arrow next to **New** and select the **Preview Unpublished Forms** option.



Custom Forms

Preview Unpublished Forms

New ▼ Blank Forms

Preview Draft Form

Users can preview both Interactive custom forms in draft status on a person's Form tool. This preview allows form administrators to troubleshoot and test custom forms before the form is published.

Note: Any information entered on the form is only for testing and is not saved to the person's record.

2. Choose the form from the **Select Form to Preview** screen.

Select Form to Preview

Module	Title	Form Instruction	Form Type
▼	▼	▼	(All) ▼
Athens Training	Volunteer Form		Interactive with DB Table, p Fillable
PLP	504 Evaluation		Interactive with DB Table

Interactive Form

Step 5: Publish

Publishing an interactive form makes the form available for use to fill out for a person. Publishing an interactive form with database table creates a database table.

****NOTE: Before publishing, users can preview Custom Forms to test ad hoc mapping, and rules****

Interactive Form with Database Table, Portal Fillable - Volunteer Form

✓

✓

✓

✓

5

UploadPrepopulate FieldsConfigure TableDefine RulesPublish

Publishing this form creates a database table and makes the form available for users to create for a person. Once the database table is created it can no longer be edited. When the form is created for a person, the data entered will be available to report in Ad hoc.

Start Date *

10/06/2022

End Date

month/day/year

Status

The Status is calculated based on the Start and End Date. Form administrators can preview draft forms attached to a person's Forms tool or Documents tool for testing purposes.

ACTIVE

< Previous

Cancel

Finish

Version a Custom Form

Users can version existing Custom Forms to preserve certain configurations from a previous version. This allows users to correct typos, update verbiage, create a new form for the new school year and keep a view of how the form has changed overtime.

Interactive Form, Portal Fillable - Secondary Student Interest Inventory - PBL



Upload



Prepopulate Fields



Define Rules

Users can enter data directly into the form using the interface. Existing data from Campus can be prepopulated into the form using Ad hoc f

Module

Counseling

Name (Required)

Limit 50 characters.

Secondary Student Interest Inventory - PBL

VERSION 1

PDF

PBL_Secondary_Student_Interest_Inventory__2023-07-12-13-48-30.pdf

Display Custom Form on Portal

☐ Campus Parent

Guardian eSignature Requirement

☒ No eSignature Required to Complete

☐ One Guardian eSignature Required to Complete

New Version

Cancel

Delete

Save & Next >

Student Forms

To add a new Custom Form to a person, click the **New** button. The **Select Form** will then display all the active forms available. Click on the Form you would like to add to the person
(There may be times you are redirected to also select records from a dropdown list to specify which record(s) to populate in certain fields).

 **Forms**
Abfall, Megan A



Select Form

Module	Title	Form Instruction	Form Type
			(All)
PLP	Written Education Plan (WEP)		Interactive
PLP	Emergency Medical Form		Interactive with DB Table
PLP	RIMP sample		Interactive with DB Table
Special Ed	OH AASCD Form		Interactive

Custom Form - RIMP sample

Instructions

Select records to prepopulate data in the form.

Course Section (Choose 1 record)

courseNumber: 4LAW	8694	Bail, Sarah
courseName: LA/Writing-4th Grade		
teacherFullName: TeacherC, Sarah		
staffNumber: OH3112327		
teamName: Grade 4-1		
courseNumber: 4HR	8694	Doudna, Britney
courseName: Homeroom-4th Grade		
teacherFullName: Doudna, Britney		
staffNumber: OH3073120		
roomName: 231		
courseNumber: 4SCI	8694	Doudna, Britney
courseName: Science-4th Grade		
teacherFullName: Doudna, Britney		

Create Form

Cancel

Completing the Form

The Name, Instructions, and form type specification will display in the form header.

The screenshot shows a web interface for a form titled "Custom Form - RIMP sample". At the top, there's a header bar with a user profile icon, the name "Abfall, Megan A", and a star icon. Below this, the form title "Custom Form - RIMP sample" is displayed next to a red warning icon. Underneath the title, there's a section for "Instructions" with checkboxes for "Portal Display", "eSignature Request", "Portal Fillable", and "Roster Display", all of which are checked. A progress bar shows "1 of 5" and a zoom level of "90%". The main form area is titled "2021-22 READING IMPROVEMENT AND MONITORING PLAN" with a note: "Note: all plans must be completed within 60 days of diagnostic test date." The form contains several input fields: "School" (META Elementary School), "Date" (10/11/2022), "Student ID" (224013), "Student Name" (Megan Alice Abfall), "Date of Birth" (02/18/2013), "Grade" (04), "Teacher" (Doudna, Britney), and "RIMP Start Date". There are also radio buttons for "Student previously retained" (Yes/No) and "Exempted from retention" (Yes/No). A red error box with a warning icon says "ERROR Please select one of these options." next to a section titled "Grades previously on RIMP" which has checkboxes for "Kindergarten", "1st Grade", "2nd Grade", and "3rd Grade". At the bottom, there's a section titled "INFORMATION FOR FAMILIES" with text: "The Reading Improvement and Monitoring Plan (RIMP) will be created by teachers and families for all students that need additional support with reading."

A **warning** icon displays if there are errors. Click the icon to view the errors.

Note: A draft of the form can be saved with a rule error, but not for overfilled fields.

Staff members are unable to 'fill in' areas that are designated to be completed by Portal user (slide: 31-32)

Form Options

Save & Stay

Save

Print

Review Participants

Cancel

Delete

Copy

Custom form options vary based on the form type.

Save & Stay

Save

Print

Lock

Cancel

Delete

Option:	Insight:
Save & Stay	Saves progress and allows user to continue working on the form
Save	Saves progress and navigates user to Forms List Screen
Print	Will print the form. For Draft and Expired Custom Forms, a watermark displays on the printed form.
Review Participants	Displays after the initial save. When finished entering data onto the form, click this button to verify who the form is being send and send eSignature Request. See slide: 31-32 for further information.
Lock/ Unlock	Clicking Lock indicated no additional changes can be made. Before locking and unlocking a message displays of the logic associated with locking a form. Note: The Lock and Unlock button doesn't display for Forms that are eSignature Requests.
Start Date	Allows Users to enter a Start Date/Time for forms that are sent to Campus Parent/Student in the future. Once the form is locked, the Form publishes to the Portal as of the Start Date and Time.
Cancel	Navigates you back to the Forms List screen without saving the work completed on the form.
Delete	Permanently removes a document from a person's record. Note: Once an eSignature request has been sent, users cannot delete the form.
Copy	Copies the data and form to a separate form. Once the confirmed, the user will be sent to the list screen and a copy of the document is listed with the date and timestamps of when the copy was created (only existing forms can be copied and the name cannot be modified).

Form Statuses

Non eSignature Documents

Status Descriptions	
Draft	The form contains errors that must be corrected before completion
Locked	The form is complete and locked. No further edits can be made
Unlocked	The form does not contain any errors
Lock and Publish	The form is complete and is available for Parent/Guardian(s) and/or Students to view on Campus Parent/Student Portal. No further edits can be made.

Forms Statuses:

eSignature Documents

Status Descriptions	
Draft	Form contains errors that must be corrected before completion
Requesting eSignatures	All errors have been corrected and the form is ready to be sent to the parent and/or Student for eSignature
Pending eSign	The number of days the signature request was sent and is awaiting eSignature
Pending Publish	The number of days until the form will be sent to the portal
Expired	The end Date of the form has passed
Action Required	Indicates all signatures are collected and the form is ready to be completed
Locked and Signed	The form is complete, and all participants have signed the document. No further edits can be made
Licked and Declined	The form is complete, and a participant has declined the document. No further edits can be made
Locked & Overridden	The form is complete, and the user has overridden at least one signature. No further edits can be made
No Participants	There are no valid Portal Accounts
Unlocked	The user has confirmed there are no participants. The form will be read only on the Portal. <i>NOTE: May need to update census information OR confirm that there aren't any participants by selecting the form and Review Participants > Confirm No Participants.</i>

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THANK YOU!