Enrollment Forms
Overview

Forms are used to collect information about a student. The information that is entered for a student is saved into the database.

The parent logs into the Forms Application with the same login they use for the parent portal. They will see the students that are directly linked to the households.

*** For schools using single sign on, the parents can access the forms through the parent portal without having to log in again.

<table>
<thead>
<tr>
<th>Student Id</th>
<th>Name</th>
<th>Forms Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>5021</td>
<td>Greg Dellerege</td>
</tr>
<tr>
<td>Select</td>
<td>70417</td>
<td>Heidi Dellerege</td>
</tr>
<tr>
<td>Select</td>
<td>70577</td>
<td>Brooks Dellerege</td>
</tr>
<tr>
<td>Select</td>
<td>70622</td>
<td>Jasmine Dellerege</td>
</tr>
</tbody>
</table>

1. The parent clicks the Select link next to a student.
2. The Parent clicks the Go To Forms button.

Clicking the Go To Forms button will take the parents to the forms for the selected student. The information collected on the forms can be spread out on different pages to make it more organized for the parent.

<table>
<thead>
<tr>
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<td>Jasmine Dellerege</td>
</tr>
</tbody>
</table>

The parent will complete all of the information for the student, which will be saved in the database in the fields that you specify for each piece of information. This data can be retrieved through Campus.

If your school is using PCR’s Parent Portal, the update should be disabled when having parents complete the Enrollment Forms. This will allow you to monitor which families have completed the form.
As the parent completes and saves the different pages of the forms, there will be a green check next to the page in the list of pages on the left side of the screen. This will show the parents what they have completed and which pages still need to be filled out.

At the bottom of each page is a Save button, which will save the current page with any changes that have been made by the parent and the Save and Next button will save the current page and take the parent to the next page in the list.

Once all of the pages have been completed and have green check marks, there will be an option to Submit Forms. Once the parent submits the forms they cannot edit the information anymore. On the Select Students screen, you will notice that once the student form has been submitted, the students from status will change from In Progress to Submitted.
Getting Started

Timeline for Setting up Forms

Read
• Read through the documentation so you know how the forms process works

Home
• Create a welcome message by using the text editor on the Select Students page

Setting
• Set up the different settings of your form using the Settings page.

Pages
• Set up the different pages of your form using the Pages & Sections page

Section
• Set up the sections on each page using the Manage Pages & Sections page

Profile
• Set up profiles using the Profiles page

Controls
• Set up the controls in each section of each page

Test
• Make sure to view your forms the way parents will see them
Things To Think About

1. When you are having households fill out the forms, you should have the update feature in the parent portal disabled. This will temporarily prevent users from updating the information through the parent portal.

2. When you are designing your Forms Application, you may want to put some thought into how you would like your pages of your form to be set up. A separate PDF will be created for each page and they will all be available in the Admin Portal of Campus.

3. When adding up your consents, you have the option to make the consents a yes/ no radio button or a check box. You also have the option to make these consents required when someone is completing the form, which means the form cannot be submitted unless this consent is completed.

Updating Forms from Last Year

If you have used the Forms Application last year, you need to:

1. Review the settings page of your Forms Application (Please see Settings for more information).

2. Review and create new profiles for your Forms Application (Please see Profiles for more information).

3. Review the Pages and Sections from the Pages & Sections page (Please see Pages & Sections for more information).

4. Review the content of your Forms and make any necessary changes from the Controls page (Please see Controls for more information).

5. Review the Holds page to make sure the proper holds can be used (Please see Holds for more information).

6. Review the Integrity page to determine if it is ok to go live with your Forms Application (Please see Integrity for more information).
New To Forms

If you did NOT use the Forms Application last year, you need to:

1. Review the settings page of your Forms Application (Please see Settings for more information).
2. Create new profiles for your Forms Application (Please see Profiles for more information). These profiles are used to determine which controls will show for a group of students.
3. Edit the Pages and Sections of the Form from the Pages & Sections page (Please see Pages & Sections for more information). Each page will create a separate PDF file once the forms are submitted.
4. Create the content of your Forms by using the Controls page (Please see Controls for more information). Make sure the controls are turned on for the correct profiles.
5. Review the Holds page to make sure the proper holds can be used (Please see Holds for more information).
6. Review the Integrity page to determine if it is ok to go live with your Forms Application (Please see Integrity for more information).

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Setting Up Logins To Edit and View The Form

It is best to have 2 different log ins for the forms:

1. **Administrator Login**: The administrator login is used to edit the setup of the forms. You can create a FormsSetUp login or you can use your login for Campus. You need to make sure the login you are using as the administrator login has the DBA Full and Security Full role and is linked to a test household with students. Once you are logged in as an administrator, you will see a menu across the top with the options Select Students, Settings, Profiles, Consents, Pages & Section, Holds, and Integrity.

2. **Parent Login**: The parent login is used to test the forms. This will allow you to log into the forms site and view the forms how the parents will see them. The best thing to do would be to have this login connected to a test household, which is connected to students. This test login can be linked to the same household that the administrator link is connected to. For example, user name: FormsTest password: schoolname123
Welcome Screen

Go to the Select Students tab across the top of the screen.

The Home Screen is what the parents will see when they log into the forms website. The links across the top and the text editor will only appear if you are logged in as an administrator.

The text editor can be used to give the parents instructions about the forms process or any other information you want to give the parents that log in. For more information about this text editor, please see Editor.pdf.

When editing large amounts of text, you may want to consider typing the text in a word processing document, such as notepad, and pasting it in the text editor. This will prevent any errors from the application timing out.

**If you are copying text from a word document, you may want to paste it in notepad before you paste it in the text editor. This will clear all of the word formatting so the text will all look the same in your forms.**

Some samples of messages that have been placed in the instruction box are:

- Welcome to the Re-Enrollment Forms process.
- Welcome to the 2012/2013 Re-Enrolment Forms. Please select your student below and proceed.
Setting Up Your Form

Settings

Go to the Settings tab across the top of the screen.

The Settings Screen will allow you to modify the settings for the forms.

A. **Header Banner**

The header banner is the image that will appear at the top of the forms site.

To upload an image, Click the Select button and select the image you would like to use as a header. This image has to be 1128 pixels wide, but the height of the image does not matter. You can check the pixels if you view the properties of the image.

Click the Upload button

The image that you have just uploaded will appear across the top of your current screen. If the image does not appear, check the pixel width.

B. **Student Criteria**

The student criteria is where you define which students that will be able to fill out the forms.

The criteria is set by a saved student filter, which is created in Campus. You create the student filter from the Student page in the Admin Portal. For information about how to create and save filters, please see the Filers.pdf document.

Once the filter is saved in campus, the filter will be available to select under the Student Criteria section.

Click the Edit link and a pop up box will appear.
The drop down box will show all of the student filters that have been saved. Select the filter that you will be using for forms.

![Filter Drop Down](#)

**If your filter is not appearing under the drop down, check to make sure the filter has the All Divisions check box selected in Campus.

Click the **Apply** button. The pop up box will go away and you will see the filter listed under Student Criteria.

![Student Criteria Table](#)

This filter has been applied to the forms. However, the filter is not linked. This means that if you change the filter in campus, the changes will not be reflected in the form website until you reapply the filter.

C. **Application Setup**

Application Setup is where you can define what the form is for, who can fill out the forms, and how the dates are displayed in the forms.

![Application Setup](#)
**Application Heading**: Enter the application name in the text box. This name is for internal purposes only.

**Year**: The school year this form is being created for. This field cannot be changed.

**Allow Resubmit**: If this option is selected, the user will be able to submit the forms multiple times. This feature is useful during testing and allows you to view and submit the forms multiple times. You will still need to [clean the consents](#) for the student after filling out their forms.

**Pass-Through to Contract**: Select the Contract application you would like the user to be taken to once they submit the form and click the Go To Contract button. This field is used if you are using the Contract Application and would like the user to be taken to the Contract after they have submitted their forms. If you are not using the Forms with the Contract, you can leave this field as None.

**Households Status**: Select who you want to fill out the forms. Select Primary if you only want the primary household to fill out a form. Select Secondary if you only want the secondary household to fill out a form. Selecting Any will allow Primary and Secondary Households to log in to the Form Application, but you should define who could fill out the form with the Bill To Household field. If you want both households to fill out a form, you would have the first form filled out by primary households only and you can create a second form for only secondary households. To create this second form, please submit a ticket to PCR.

**Bill To Households**: Select who you want to fill out the forms. Select Bill To Only if you only want households that are Bill To Households connected with a student to fill out forms. Select Non-Bill To Only if you only want households that are Non-Bill To Households connected with a student to fill out the forms. Selecting Any will allow Bill To and Non-Bill To Households to log in to the Form Application, but you should define who could fill out the forms with the Households Status field. If you want both households to fill out a form, you would have the first form filled out by Bill To households only and you can create a second form for only Non-Bill To households. To create this second form, please submit a ticket to PCR.

**Culture**: Select a language that your school uses. This will determine how the dates are displayed in the forms.

**Last Application Date**: This date will allow you to specify the last date that you will be accepting contracts for the academic year of the contract application. This date will prevent the parents from completing the contract application for a previous year. For example, if the Contract is for 2014/2015 and the date is set to 10/1/2014, the parent will not be able to complete the contract for 2014/2015 after 10/1/2014.

**School Year is Closed**: This setting is used to determine if the school year has been closed. This setting will automatically be updated during the close of the school year process. This setting will determine the grade level that is used when assigning any of the actions that are given through the contract application. For example, if the school year is not closed, the grade level used when assigning a Contract Completed action will be the Grade Level Next Year. If the school year has already been closed, the grade level that will be used when assigning a Contract Completed action will be the Current Grade Level.

Click the **Save** button to save the Application Setup changes.

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**D. Actions**
Delete Contract Hold: If you are using the contracts application and you want the forms to be completed first, you can put a hold on students so they cannot access the contract. This hold would be specified in this field. An example of this action is Forms Not Completed. This action will be deleted once the forms have been completed. For more information about creating actions in Campus, please see Admissions Funnel, Actions and Preference SetUp.pdf

Forms Submitted: Select an action that has been created in Campus to give to a student once the forms have been submitted. An example of this action is Forms Submitted. For more information about creating actions in Campus, please see Admissions Funnel, Actions and Preference SetUp.pdf

Not Enrolling: Select an action that has been created in Campus to give to a student if the Not Enrolling button has been selected. An example of this action is Forms Not Enrolling. If an action is selected for this field, the I/We do not wish to Enroll” button will appear on the home page when the parent selects there student. If no action is specified, this button will not appear. For more information about creating actions in Campus, please see Admissions Funnel, Actions and Preference SetUp.pdf

Profiles

Go to the Profile tab across the top of the screen.

The Profile Screen will allow you to add or modify different profiles.

You can create different versions of the forms for different students by creating different profiles. Each student has to fit in exactly 1 profile. This means a student cannot qualify for two different profiles and there should be no students that do not fit in one of the profiles created.

Keep in mind that each profile will have the same pages and sections, but different consents can be assigned to certain profiles.

You want to strive for the least amount of profiles as possible, but still making sure all students are included.

A. Creating New Profiles

If you want the consents to be shown on the forms, they need to be connected to a profile.

To Create a new profile, click the New link located in the titles of the table. This table will only appear if there have already been profiles set up.

If no profiles have been set up, click on the New Profile link.

No Profiles found. New Profile
A pop up box, Edit Profile, will be displayed.

You can enter the description of the profile, which will be for internal purposes and the parents will not see this description. You also have to select a saved student filter, which is created in Campus. You create the student filter from the Student page in the Admin, Admissions, or Registrar Portal. This filter needs to have the All Divisions check box selected to appear in the drop down menu for forms. For information about how to create and save filters, please see the Filers.pdf document.

Once the filter is saved in campus, the filter will be available to select in the Edit Profile pop up window.

The drop down box will show all of the student filters that have been saved. Select the filter that you will be using for this profile.

Click the Save button. The pop up box will go away and you will see the profile you have just created.

This filter has been applied to the profile. However, the filter is not linked. This means that if you change the filter in campus, the changes will not be reflected in the profiles until you reapply the filter.
B. **Profile Statistics**

The profile statistics are located at the bottom of the profile page and they are there to assist you when creating profiles. Because you cannot have a student unaccounted for in profiles and you also cannot have a student accounted for in more than one profile, these statistics show you which students may cause errors.

- **Enrolled Students Un-Accounted For:** 59
- **Students Match Multiple Profiles:** 0
- **No Parent Login for Student Form:** 742

**Enrolled Students Un-Accounted For:** This is the total number of enrolled students that do not fit under any of the current profiles that you have set up. Because you want all students to be accounted for, this number should only include the current seniors who will be graduating and not filling out any enrollment forms.

**Students Match Multiple Profiles:** This is the total number of students that fall under multiple profiles with the way they are currently set up. Because a student cannot fall under more than one profile, this number should be 0.

**No Parent Login for Student Form:** This is the total number of students who do not have a parent login associated with them. These parent logins are created in campus from the household details page. Because you want forms for all students to be viewed by a parent, the number of no parent logins should be 0.

***If the number is not 0 and all of the parents have logins, check to make sure the household status and bill to households options on the Settings page are correct.

If these numbers are not 0, you can click on the number, which will bring up a list of students that are Unassociated, or students that match multiple profiles, or student forms with no parent logins.
Pages and Sections

Go to the Pages and Sections tab, which is located across the top of the screen.

This is the tab that is used to plan out the form, its pages and sections. Ideally you should plan out the form ahead of time. This makes the setup much more efficient

A. Pages

Pages are listed on the left side of the Form Application. Pages normally contain different types of information. For example, there could be a student page with all of the student information, a primary household page with all of the primary household information, a secondary household with all of the secondary household information, etc.

Below is an example of how the pages will appear in the Forms Application. As each page is completed and saved, a green check will appear next to each page. Once all pages have been completed and saved, the user will be able to submit the form.

***Each page of your form will create its own PDF document, which will be available in the Admin portal of Campus.
B. Adding Pages

On the Manage Pages & Sections page, use the New Page Title field to enter a new page title and click the Add new page button.

New Page Title: [ ]

Add new page

You will see that your page has been added to the list of pages on the Pages and Sections page.

C. Ordering Pages

You can use the up and down arrows to reorder your pages. Remember the order your pages appear on this screen will be the order that they appear when the parent is completing the forms.

D. Editing Pages

If you want to change the name of the page, you can edit the name of the page in the field and click the Save All button that is located at the top or bottom of the page.

Household Update

Save All

E. Deleting Pages

You can use the red X next to a page title to delete the page.

Household Update

Keep in mind: You cannot delete a page if there are sections created under the page.
E. Sections

Sections are parts of the pages. A page can contain multiple sections. Sections are used to visually organize the information that the user will be giving. Some examples of Sections on a Parent Profile Page would be Household, Parent 1 Personal Data, Parent 1 Phones, Parent 1 Emails, Parent 1 Employer, etc.

Below is an example of how sections will appear on a page in the Forms Application.

<table>
<thead>
<tr>
<th>Household</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address*</td>
</tr>
<tr>
<td>Address Line 2</td>
</tr>
<tr>
<td>City*</td>
</tr>
<tr>
<td>State*</td>
</tr>
<tr>
<td>Zipcode*</td>
</tr>
<tr>
<td>Home Phone*</td>
</tr>
<tr>
<td>( ) -</td>
</tr>
<tr>
<td>Publish on Web Directory</td>
</tr>
<tr>
<td>Publish in Print Directory</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Parent/Guardian 1 Personal Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
</tr>
<tr>
<td>Title</td>
</tr>
<tr>
<td>First Name</td>
</tr>
<tr>
<td>Last Name</td>
</tr>
<tr>
<td>Cell Phone</td>
</tr>
<tr>
<td>( ) -</td>
</tr>
<tr>
<td>Work Phone</td>
</tr>
<tr>
<td>( ) -</td>
</tr>
<tr>
<td>Email Address</td>
</tr>
<tr>
<td>Employer</td>
</tr>
<tr>
<td>Position</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Parent/Guardian 2 Personal Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
</tr>
<tr>
<td>Title</td>
</tr>
<tr>
<td>First Name</td>
</tr>
<tr>
<td>Last Name</td>
</tr>
<tr>
<td>Cell Phone</td>
</tr>
<tr>
<td>( ) -</td>
</tr>
<tr>
<td>Work Phone</td>
</tr>
<tr>
<td>( ) -</td>
</tr>
<tr>
<td>Email Address</td>
</tr>
<tr>
<td>Employer</td>
</tr>
<tr>
<td>Position</td>
</tr>
</tbody>
</table>
F. **Adding Sections**

On the Manage Pages & Sections page, once you have created pages, you will notice there are blank fields listed under each page.

These blank fields are used to add sections to a page. Type the name of the section into the blank field and click the update icon (up arrow) on the right side of the field.

This field will become a section and you will see up and down arrows and a red X on the left side of the field. You will also notice a new blank field appears below the section you have just created. This is used to create more sections on the page.

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G. **Editing Sections**

You can use the up and down arrows to reorder your sections within a page. Remember the order your sections appear on this screen will be the order that they appear on the page when the parent is completing the forms.

If you want to change the name of the section, you can edit the name of the section in the field and click the update icon (up arrow) that is directly to the right of the section title. This update icon (up arrow) has the same function as a save button.
H. Deleting Sections

You can use the red X to the left of the section title to delete the section.
Controls

Go to the Controls tab across the top of the screen.

Controls are the pieces of information that your school is requesting from the user. For example, Parent 1 First Name, Parent 1 Last Name, Parent 1 Preferred Name, Parent 1 Phone #, etc.

The Controls Screen is where you can add and edit the different controls that are in the forms. The links across the top will only appear if you are logged in as an administrator.

A. Adding a Control

To add a control, go to the Controls page, which is where you will see a list of all of the existing controls that have been added to the forms.

Make sure you have selected the page and section you would like to add the control by using the drop downs on the left side of the screen.

Select the control type that you would like to add by using the drop down on the right side of the screen.

**Using the drop down at the top of the page will add the control to the top of the list of controls. Using the drop down at the bottom of the screen will add the control to the bottom of the list of controls. Once you have added the control, you can reorder the controls.
Make sure once you add a control, you select which profiles it should be visible to by using the profile checkboxes.

### B. Editing Controls

Once a control has been added, you can click on the blue arrow to the left of the control to open up the details and make any adjustments. For more information about each control, please see [Types of Controls](#).

### B. Deleting Controls

If you have added a control and you no longer want the control in a section, you have to click the Delete button that corresponds with the control you want to get rid of.
C. **Types of Controls**

Below is a list of all of the different controls that are available in the form application.

- Attribute Control
- Consent Check Box Control
- File Upload
- Immunizations Control
- Number Control
- Text Box
- Consent Control
- Health Issues Control
- Instruction
- Protected Date Control
- Signature
- Check Box
- Drop Down
- Hidden Field
- Masked Box
- Student Selection
- Check Box List
- Masked Box

1. **Attribute Control**

The attribute control will give the selected attribute to the student and attach any information to the attribute notes.

Below is an example of editing an attribute control:

![Attribute Control Example](image)

When editing a control, there will always be a preview right above of how the control will look on the form. The changes that you make will be shown in the preview once the control has been saved.

To edit the attribute control, provide information in the following fields:

- **Control Title**: This is the description that will appear to the left of the check box to let the user know what the check box is for.
- **Required**: Making a control required means that the control must be checked to save the page. If the control is required, the Control Title will be displayed in **bold** on the form.
- **Attribute**: Select the student attribute that you want to record information with. These attributes are set up in campus.
- **Data Type**: Select the data type that you want the parents to enter. The different options are checkbox, date, dropdown, number, text, and text (Long).
- **Lookup Type**: The lookup type determines the information that will be available in the drop down. The lookup type only needs to be selected if you are using the data type of dropdown.
2. Check Box

The check box control allows the user to agree (Yes) or disagree (No) with something. Yes/True is when the checkbox is checked and No/False is when the checkbox is not checked.

Below is an example of editing a check box control:

![Check Box Example](image)

When editing a control, there will always be a preview right above of how the control will look on the form. The changes that you make will be shown in the preview once the control has been saved.

To edit the check box control, provide information in the following fields:

- **Control Title**: This is the description that will appear to the left of the check box to let the user know what the check box is for.
- **Required**: Making a control required means that the control must be checked to save the page. If the control is required, the Control Title will be displayed in **bold** on the form.
- **DB Table**: Select the table that corresponds with the information you want to receive from the user. The Students table contains information about the student and the Households table contains information related to the student’s household. This field will determine which options are available in the DB Field drop down menu.
- **DB Field**: Select the field that corresponds with the information you want to receive from the user. The drop down will only show the database fields that have the option to be yes or no. **When the user inputs a response in this control, this response will be recorded in the field selected.**

Make sure you save the settings after editing each control.

3. Check Box List

The check box list control allows the user to agree (Yes) or disagree (No) with something and enter a comment about their selection. Yes/True is when the checkbox is checked and No/False is when the checkbox is not checked.

Below is an example of editing a check box list control in a section:
When editing a control, there will always be a preview right above of how the control will look on the form. The changes that you make will be shown in the preview once the control has been saved.

To edit the check box control, provide information in the following fields:

- **Lookup Type**: Select the global lookup that is created in the Apply Online Application to give the user options to check.

- **Required**: Making a control required means that the control must be checked to save the page. You can specify how many of the responses are required by entering a number in the “at least” text box. This is the minimum number of responses that a user must select.

- **DB Table**: Select the table that corresponds with the information you want to receive from the user. The Students Groups table contains information about the students and their activities or groups.

Make sure you save the settings after editing each control.

### 4. Consent Check Box Control

The consent check box control allows the user to agree (Yes/Checked) with a consent by checking a check box. Yes/True is when the checkbox is checked. By making a checkbox consent required, the user will not be able to submit the form unless they agree with the consent and select the checkbox.

Below is an example of editing a consent check box control in a section:
When editing a control, there will always be a preview right above of how the control will look on the form. The changes that you make will be shown in the preview once the control has been saved.

To edit the check box control, provide information in the following fields:

- **Consent Type**: Select a consent from the drop down menu. These consents are created in the Consents tab.

- **Short Desc**: This should be populated for each consent and this will allow you to search for the control information in the data mining tool and in filters.

- **Required**: Selecting this checkbox means that this consent is required to be answered to save the page.

- **Comment Visible**: Selecting this check box means that there will be a comment box under the selected consent for the user to enter any comments they may have about the consent.

Make sure you save the settings after editing each control.

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5. **Consent Control**

The consent control allows the user to agree (Yes) or disagree (No) with a consent by selecting either the yes or no radio button option. A photography consent (can take pictures of the student) could be created as a yes or no option. This way the parent knows they can opt out of this option. By making this response required, the consent just has to be responded to even if the user’s response is no.

Below is an example of editing a check box list control in a section:

When editing a control, there will always be a preview right above of how the control will look on the form. The changes that you make will be shown in the preview once the control has been saved.

To edit the check box control, provide information in the following fields:

- **Consent Type**: Select a consent from the drop down menu. These consents are created in the Consents tab.

- **Short Desc**: This should be populated for each consent and this will allow you to search for the
control information in the data mining tool and in filters.

- **Required:** Selecting this checkbox means that this consent is required to be answered to save the page.

- **Comment Visible:** Selecting this check box means that there will be a comment box under the selected consent for the user to enter any comments they may have about the consent.

Make sure you save the settings after editing each control.

### 6. Drop Down

The drop down control allows the user to select a response from a drop down menu. The drop down menu is populated by global lookups that are created in campus. The option that is selected by the user is the value that is entered into the database.

Below is an example of editing a drop down control in a section:

![Drop Down Control Example](image)

When editing a control, there will always be a preview right above of how the control will look on the form. The changes that you make will be shown in the preview once the control has been saved.

To edit the drop down control, provide information in the following fields:

- **Control Title:** This is the description that will appear to the left of the text box to let the user know what the text box is for.

- **Lookup Type:** Select the global lookup that is created in the Apply Online Application to give the user options in the drop down box.

- **Required:** Making a control required means that the control must have a response from the user to save the page. If the control is required, the Control Title will be displayed in **bold** on the form.

- **DB Table:** Select the table that corresponds with the information you want to receive from the user. The Students table contains information about the student and the Households table contains information related to the student’s household. This field will determine which options are available in the DB Field drop down menu.

- **DB Field:** Select the field that corresponds with the information you want to receive from the user. The drop down will only show the database fields that requires a number. **When the user inputs a response in this control, this response will be recorded in the field selected.**

Make sure you save the settings after editing each control.
7. **File Upload**

The file upload control allows the user to upload a document to the forms application. This document will be attached to a student action, which can be found on the student’s record.

Below is an example of editing a file upload control in a section:

![File Upload Control Example](image)

When editing a control, there will always be a preview right above of how the control will look on the form. The changes that you make will be shown in the preview once the control has been saved.

To edit the file upload control, provide information in the following fields:

- **Control Title**: This is the description that will appear to the left of the upload box to let the user know what they will be uploading.

- **Required**: Making a control required means that the control must have a response from the user to save the page. If the control is required, the Control Title will be displayed in **bold** on the form.

- **Action**: Select the action that will be given to the student when the file is uploaded. This will be the action that the file will be attached to.

Make sure you save the settings after editing each control.

---

8. **Health Issues Control**

The health issues control allows the user to select any health issues the student might have with a note about the health issue. This control is populated by the health issues that are set up in the Health Portal in Campus.

Below is an example of editing a health issues control in a section:
When editing a control, there will always be a preview right above of how the control will look on the form. The changes that you make will be shown in the preview once the control has been saved.

To edit the health issues control, provide information in the following fields:

- **Health Category**: You can select a health category if you only want to show specific categories from the health issues that are set up in Campus. If you want all of the health categories to show, you can select “All.”

To edit the health issues, you need to edit them in the Health Portal in Campus. Please see Health.pdf for more information.

### 9. Hidden Field

This field is used when you want to automatically enter a particular value into the database. No data entry is required for the parent.

An example of this would be if you wanted to have the work phone type entered in Parent 1 Phone Type field.

Below is an example of editing a hidden field control:

When editing a control, there will always be a preview right above of how the control will look on the form.
The changes that you make will be shown in the preview once the control has been saved.

To edit the hidden field control, provide information in the following fields:

- **DB Table**: Select the table that corresponds to where you want to store this information. The Students table contains information about the student and the Households table contains information related to the student’s household. This field will determine which options are available in the DB Field drop down menu.

- **DB Field**: Select the field that corresponds with the information you want to store the information. **When the user saves the page, this value specified will be recorded in the field selected.**

- **Value**: Enter the value you would like to be stored in the field you have specified in the DB Table and Field.

10. **Immunizations Control**

The immunizations control allows the user to enter information about immunizations that the child has. This control is populated by the immunizations that are set up in the Health Portal in Campus.

Below is an example of editing an immunizations control in a section:

![Immunizations Control](image)

**There are no options to edit this control from the Forms application** besides adding or deleting the control. To edit the immunizations, you need to edit them in the Health Portal in Campus. Please see [Health.pdf](#) for more information.

11. **Instruction**

The instruction control is used to show instructions for the user at the top of a section or the top of the page (if you include an instructions section).

Below is an example of editing an instruction control in a section:
When editing a control, there will always be a preview right above of how the control will look on the form. The changes that you make will be shown in the preview once the control has been saved.

To edit the instruction control, type the text you want the user to see while they are completing the form. For more information about using the text editor, please see Editor.pdf.

12. Masked Box

The masked box control allows the user to type in a preformatted response, like a phone number.

Below is an example of editing a masked box control in a section:

When editing a control, there will always be a preview right above of how the control will look on the form. The changes that you make will be shown in the preview once the control has been saved.

To edit the masked box control, provide information in the following fields:

- **Control Title**: This is the description that will appear to the left of the masked box to let the user know what the text box is for.

- **Mask**: Enter the format you want the user’s response to be in. The symbols that can be used in the mask field are:
### Symbol | Description
--- | ---
# | This character will only allow the user to enter a number
L | (upper case L) This character will only allow the user to enter an uppercase letter (A-Z)
l | (lower case L) This character will only allow the user to enter a lowercase letter (a-z)
a | (lower case A) This character allows the user to enter any character
<n..m> | This character allows the user to enter any number between a range of numbers ex. <0..100> You can adjust the range of numbers
All other characters | They will display as themselves in the text box where the user can enter data ex. Mask: ### ### ###

- **Example**: You can enter an example of the type of response you are expecting from the user. This will be displayed to the right of the text box on the form.

- **Required**: Making a control required means that the control must have a response from the user to save the page. If the control is required, the Control Title will be displayed in **bold** on the form.

- **DB Table**: Select the table that corresponds with the information you want to receive from the user. The Students table contains information about the student and the Households table contains information related to the student’s household. This field will determine which options are available in the DB Field drop down menu.

- **DB Field**: Select the field that corresponds with the information you want to receive from the user. The drop down will only show the database fields that would need a written response from the user. When the user inputs a response in this control, this response will be recorded in the field selected.

Make sure you save the settings after editing each control.

### 13. Number Control

The number control allows the user to only enter a number into the text box.

Below is an example of editing a number control in a section:
When editing a control, there will always be a preview right above of how the control will look on the form. The changes that you make will be shown in the preview once the control has been saved.

To edit the number control, provide information in the following fields:

- **Control Title**: This is the description that will appear to the left of the text box to let the user know what the text box is for.

- **Example**: You can enter an example of the type of response you are expecting from the user. This will be displayed to the right of the text box on the form.

- **Required**: Making a control required means that the control must have a response from the user to save the page. If the control is required, the Control Title will be displayed in **bold** on the form.

- **DB Table**: Select the table that corresponds with the information you want to receive from the user. The Students table contains information about the student and the Households table contains information related to the student’s household. This field will determine which options are available in the DB Field drop down menu.

- **DB Field**: Select the field that corresponds with the information you want to receive from the user. The drop down will only show the database fields that requires a number. **When the user inputs a response in this control, this response will be recorded in the field selected.**

Make sure you save the settings after editing each control.

---

14. **Protected Date Control**

The protected date control allows the user to type in a date and the user’s response will automatically convert to the proper date format to be placed in the database.

Below is an example of editing a protected date control in a section:

When editing a control, there will always be a preview right above of how the control will look on the form. The changes that you make will be shown in the preview once the control has been saved.

To edit the protected date control, provide information in the following fields:

- **Control Title**: This is the description that will appear to the left of the text box to let the user know what the text box is for.

- **Example**: You can enter an example of the type of response you are expecting from the user. This
will be displayed to the right of the text box on the form.

- **Required**: Making a control required means that the control must have a response from the user to save the page. If the control is required, the Control Title will be displayed in **bold** on the form.

- **DB Table**: Select the table that corresponds with the information you want to receive from the user. The Students table contains information about the student and the Households table contains information related to the student’s household. This field will determine which options are available in the DB Field drop down menu.

- **DB Field**: Select the field that corresponds with the information you want to receive from the user. The drop down will only show the database fields that require dates. **When the user inputs a response in this control, this response will be recorded in the field selected.**

Make sure you save the settings after editing each control.

### 15. Student Selection

The student selection control allows the parent to select the student’s course selections through the forms. The course selections are the courses that the student would like to take for the following year.

Below is an example of editing a protected date control in a section:

![Student Selections](image)

To edit the student selection control, provide information in the following fields:

- **Show Department Header**: If this checkbox is selected, the course selections will show the department header.

- **Show Department Description**: If this checkbox is selected, the course selections will show the department description.

- **Show Course Header**: If this checkbox is selected, the course selections will show the course header.

- **Show Credits Per Term**: If this checkbox is selected, the course selections will show the credits per
term.

- **Show Num of Terms**: If this checkbox is selected, the course selections will show the number of terms for the course.

- **Show Signature**: If this checkbox is selected, the course selections will show that a signature is required for some courses.

- **Show Ranking**: If this checkbox is selected, the course selections will show the ranking option, which will allow the students to specify which courses they would like to take over other courses.

- **Show Course Descriptions**: If this checkbox is selected, the course selections will show the course descriptions for each course.

Make sure you save the settings after editing each control.
13. **Text Box**

The text box control allows the user to type in a response.

Below is an example of editing a text box control in a section:

When editing a control, there will always be a preview right above of how the control will look on the form. The changes that you make will be shown in the preview once the control has been saved.

To edit the text box control, provide information in the following fields:

- **Control Title**: This is the description that will appear to the left of the text box to let the user know what the text box is for.

- **Example**: You can enter an example of the type of response you are expecting from the user. This will be displayed to the right of the text box on the form.

- **Required**: Making a control required means that the control must have a response from the user to save the page. If the control is required, the Control Title will be displayed in **bold** on the form.

- **DB Table**: Select the table that corresponds with the information you want to receive from the user. The Students table contains information about the student and the Households table contains information related to the student’s household. This field will determine which options are available in the DB Field drop down menu.

- **DB Field**: Select the field that corresponds with the information you want to receive from the user. The drop down will only show the database fields that would need a written response from the user. **When the user inputs a response in this control, this response will be recorded in the field selected.**

Make sure you save the settings after editing each control.
14. **Signature**

The signature control allows the user to electronically sign the forms. **The signature control can only be added to the section of the forms where the Submit button is located (red box at the top of the page).**

Below is an example of editing a signature control:

![Signature Control Example](image)

When editing a control, there will always be a preview right above of how the control will look on the form. The changes that you make will be shown in the preview once the control has been saved.

To edit the signature control, provide information in the following fields:

- **Control Title:** This is the description that will appear to the left of the signature box to let the user know what the text box is for.
- **Required:** Making a control required means that the signature box must have a response from the user to submit the form. If the control is required, the Control Title will be displayed in **bold** on the form.

C. **Selecting Profiles for Controls**

Different Profiles can have different controls visible. This is useful if a control only applies to certain students.

Once you have added a control to the forms, you will be able to select which profiles the control is visible to.

To select the profiles for a particular consent, click the checkbox for the profile that you want the control to show for, which is located in the Profiles column.

![Profiles Selection Example](image)
Holds

Go to the Holds tab across the top of the screen.

The Holds Screen will allow you to modify the message that parents see for the different holds that you can put on the students.

When you put a student on hold, they will be given the hold action and they will not be able to open the forms until this hold action is removed. The hold actions are given and removed from a student record from the Admin Portal in Campus.

You can have a message displayed to the parents who log into the Forms application when the student with a hold is selected. This message is created or edited from the Holds screen.

Contract Holds

If you are using the contract application along with the forms application and would like the forms to be filled out first, you can create a hold action on all students who are filling out the forms and contracts. An example of this hold action is Forms Not Submitted.

This action needs to be specified:

1. In the Forms application, on the Settings page in the “Delete Contract Hold” field. Specifying this action in this field will delete the student action when the form is submitted.

2. In the Contract application, on the Holds page. By specifying this action on the holds page, the parent will not be able to access the students contract until the form has been completed.
The Integrity page is a list of all the errors that exist on your Form application.

Some of the errors that you might see are:

- Unaccounted student
- Students have Forms Submitted actions this Academic Year
- No primary household
- No billing household
- Orphaned Controls

The Integrity page includes 4 different columns, Issue id, Issue Type, Issue Severity, and Issue Desc.

<table>
<thead>
<tr>
<th>issue_id</th>
<th>issue_type</th>
<th>issue_severity</th>
<th>issue_desc</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Status</td>
<td>0</td>
<td>Not safe to go live, please address the issues below.</td>
</tr>
<tr>
<td>1</td>
<td>Submitted Action type does not exist</td>
<td>2</td>
<td>frmsb</td>
</tr>
<tr>
<td>2</td>
<td>Students have Forms Submitted actions this Academic Year</td>
<td>2</td>
<td>5021 Dellerege, Greg Nov 1 2011 12:21PM</td>
</tr>
<tr>
<td>3</td>
<td>Unaccounted student</td>
<td>2</td>
<td>3025 Bar, Monika</td>
</tr>
<tr>
<td>4</td>
<td>Unaccounted student</td>
<td>2</td>
<td>3050 Beerels, Aparna</td>
</tr>
<tr>
<td>5</td>
<td>Unaccounted student</td>
<td>2</td>
<td>3456 Arendsen, Alexander</td>
</tr>
</tbody>
</table>

**Issue Id:** Every issue related to the Forms application has a unique id number.

**Issue Type:** This field tells you what the issue is.

**Issue Severity:** This field tells you how critical the issue is. The higher the number the more severe the issue is and it should be fixed first.

**Issue Description:** This field has a description of the issue. If the issue is an unaccounted student, the description will tell you which student is unaccounted for and their student id. If there is an orphaned control, the description will tell you which control is orphaned.

*The issue with id of 0 is the status of the forms. Under the description there will be a message letting you know if your form is safe to go live.*
Explanations of some of the integrity items:

- **No NotEnrollingAction lookups found**: On the settings page, there is a Not Enrolling Action that you can select. If an action is selected, on the select students page, an "I/We do NOT wish to enroll" button will appear and if a parent selects this button the student will be given the action specified. **Selecting a Not Enrolling Action is optional.**

- **No HoldLookupType lookups found**: This integrity means there are no holds being used with your forms. For more information about holds, please see [Holds]. **Holds are optional.**

- **Form “Re-Enrollment Forms 2012-2013” has PDFs**: When a form is submitted, PDFs are generated for each student. If you see this item in the integrity list before you have gone live with your forms, it is because you have submitted forms for a test student.

Table of Contents
Editing Your Forms

Editing Controls

While logged in as an administrator, go to the Select Students page.

Click Select next to a student’s name and click the Go to Forms button.

<table>
<thead>
<tr>
<th>Student Id</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>3025</td>
<td>Monika Bar</td>
</tr>
<tr>
<td>70649</td>
<td>Sarah Bar</td>
</tr>
<tr>
<td>71201</td>
<td>Melissa Bar</td>
</tr>
<tr>
<td>20143360</td>
<td>Maria Bar</td>
</tr>
</tbody>
</table>

You will be taken to the form, but in editor mode. This editor mode will allow you to edit each of the controls. Make sure after you edit each control you click the Save button or your changes will not be saved.

Use the page navigation on the left side of the screen to switch to a different page.
Editing the Thank You Page

The Thank You page is what the user will see once all of the pages have been completed and saved. This is the page that has the Submit Forms button.

There is a text editor at the top of the editor page of the forms. You can enter your Thank You page text in this text editor. For more information about using the text editor, please see Editor.pdf.
Viewing/ Testing Your Forms

To view your forms, make sure you are logged in with your test login and not your administrator login.

Click on the Select link next to a student that is shown at the bottom of the Select Students page. Only the students that are associated to you as a parent will show in this list.

<table>
<thead>
<tr>
<th>Student Id</th>
<th>Name</th>
<th>Forms Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>3025</td>
<td>Monika Bar</td>
<td>In Progress</td>
</tr>
</tbody>
</table>

The student will be select in yellow and the Go to Forms button will appear below all of the students.

<table>
<thead>
<tr>
<th>Select</th>
<th>Student Id</th>
<th>Name</th>
<th>Forms Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>3025</td>
<td>Monika Bar</td>
<td>In Progress</td>
</tr>
<tr>
<td>Select</td>
<td>70649</td>
<td>Sarah Bar</td>
<td>In Progress</td>
</tr>
<tr>
<td>Select</td>
<td>71201</td>
<td>Melissa Bar</td>
<td>In Progress</td>
</tr>
<tr>
<td>Select</td>
<td>20143360</td>
<td>Maria Bar</td>
<td>In Progress</td>
</tr>
</tbody>
</table>

Click the Go to Forms button. This will show you the forms for the student. If you complete a page and save it, the next time you log in, this page will still have a green check next to it showing that the page has been completed.
### FAQ

<table>
<thead>
<tr>
<th>Issue</th>
<th>You should check…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does the Forms Application work with single sign on?</td>
<td>• If you have single sign on and it has been set up to work with the forms, it will work.</td>
</tr>
</tbody>
</table>

### Troubleshooting Your Forms

<table>
<thead>
<tr>
<th>Issue</th>
<th>You should check…</th>
</tr>
</thead>
<tbody>
<tr>
<td>My header banner is running off the side of the page or doesn’t fit across the top of the page.</td>
<td>• Check to make sure the image that was uploaded is 1128 pixels wide.</td>
</tr>
</tbody>
</table>
| A student is not showing when a parent logs in to the forms application. | • Does the student fit in the Student Criteria filter?  
• Does the student have a grade next year?  
• Does the student fit in one of the profiles that have been created?  
• Check the Household options for Household Status and Bill To Households on the Settings Page |
| A graduated or withdrawn student is showing when a parent logs in to the forms application. | • Make sure there is a correct student criteria filter applied on the settings page. |
| How do I view the students that have completed the forms?             | • Create a filter or a Data Mining Tool for all of the students who have the Forms Submitted action, which you have specified in the Forms Submitted Action field on the Settings page of the Forms Application. |
| A student is showing in multiple profiles. How do I fix this?         | • Check to make sure your filters are correct so the student is only included in one of the profiles.  
• Check the student information to make sure they only qualify for one of the profiles. |
| I have a student that is un-accounted for. How do I fix this?         | • Make sure the student fits one of the profiles.  
• Try recreating the student filter with the criteria in a different order. |
Before Going Live Checklist

Settings Page:
- Make sure you have a Header Banner
- Make sure you have a Student Criteria filter
- Make sure you have a Forms Submitted Action (Delete Contract Hold and Not Enrolling Action are only used if the Form application is working with the Contract application)
- Make sure Allow Resubmit button is NOT checked

Profiles Page:
- Make sure all of your profiles have filters
- Make sure the Enrolled Students Unaccounted For (should only include current seniors or graduating students)
- Make sure Students Match Multiple Profiles =0
- Make sure No Parent Login for Student Contract =0
- If you were testing with real students, make sure to Clean Consents for that student

Consents:
- Make sure all of your consents are correct and appear for the right profiles
- Make sure any of the consents that are required are marked as required

Pages & Sections:
- Make sure all of your page and section titles are correct and displayed in the right order

Controls/ Options:
- Make sure all of the controls that have been added are connected to the correct table and field in Campus
- Make sure all of the controls are being displayed on your form properly

Submit/Thank You Page:
- Make sure you review the Submit message (the message the parent will see with the Submit Forms button once they have saved all of the pages)
- Make sure you review the Thank You page (the page the parent is taken to after the forms have been submitted

Campus:
- Add Holds to students that are listed on the Holds page in the Contract application (only if you are using Holds)

Testing Contract:
- Check to make sure Holds are working properly for a test student
- Test each profile of the form from Opening the form -> Submitting the form -> viewing the updated form information and permissions/Consents in campus
- Check the Integrity page in the Forms application to make sure there are no errors