

Manage Custom Forms on the Counseling Documents Tool

Last Modified on 03/11/2024 8:45 am CDT

[Custom Forms Document Detail](#) | [Select Prepopulation Data](#) | [Complete Form](#)

Tool Search: Documents

Custom Forms are editable PDF documents used to supplement documents linked to a person's record. Custom forms can be linked to a specific person and prepopulated with data on the person's Documents tool, or accessed outside of the context of a person from the Blank Forms area on the [Forms](#) tool. Examples of custom forms include notices, consent forms, and service specific eligibility forms. Lists of custom forms are available for many states in the [State Specific Information](#) area.

The content of existing custom forms associated with a person will not change when an Administrator changes Ad Hoc mappings on the form in System Administration. See the [Custom Forms](#) article for additional information.

Custom Forms Document Detail

When a Custom Form is created and saved for a person, the **Document Detail** that appears below the Document list includes a **School Year** field. This date defaults to the date the form was created and determines into which calendar the form will be organized. If the form needs to be organized into a different calendar, the School Year field can be used to move it to a different calendar.

Forms located in the forms folder are organized by the Year and then the Modified Date.

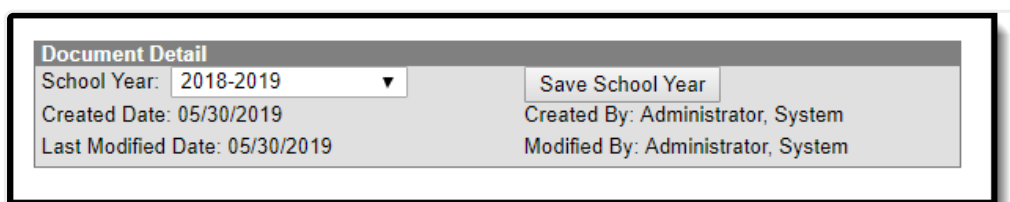


Image 1: Custom Forms Document Detail

Select Prepopulation Data

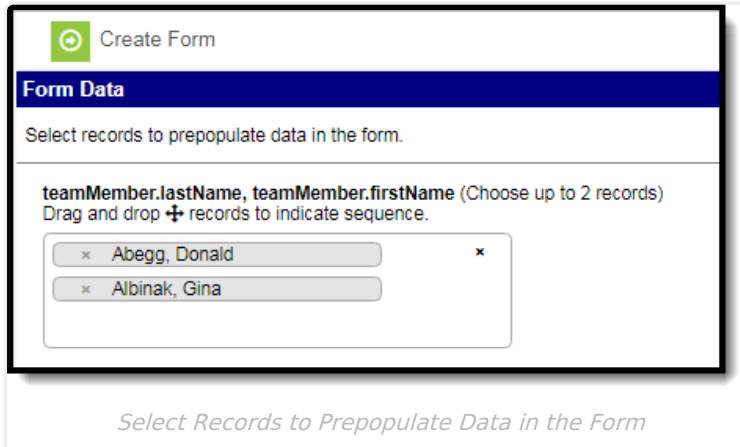
When setting up a [Custom Form](#), form administrators have the option of mapping Ad hoc fields to editable fields in the form. These mapped fields populate based on the person's data to which the form is attached.

Forms may include multiple fields mapped to the same Ad hoc field, such as reporting a list of team members or behavior events. When the form is created in System Administration, Sequence values are selected for fields in a list. The user creating the form then indicates the order that records

should populate in the form. This process is best illustrated with an example.

Team Members Example

An example form includes a list of a person's team members. When mapping Ad hoc fields to the form, the form administrator aligned TeamMember.lastName and TeamMember.firstName to two fields in a list, with Sequences of 1 and 2. When a user selects the form to add to a person, the first step is to select which records populate in these fields and in what order. Select records from the dropdown list and reorder them as desired by clicking and dragging records.



Create Form

Form Data

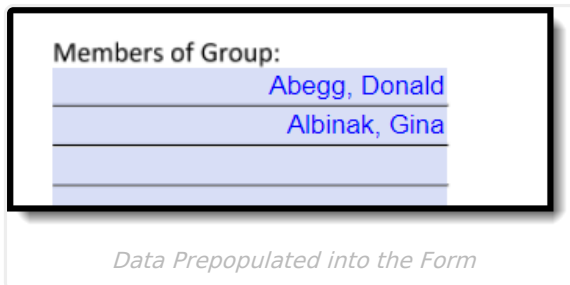
Select records to prepopulate data in the form.

teamMember.lastName, teamMember.firstName (Choose up to 2 records)
 Drag and drop + records to indicate sequence.

- x Abegg, Donald x
- x Albinak, Gina

Select Records to Prepopulate Data in the Form

Click the **Create Form** button after all selections have been made. In the form, selected records display in the indicated order.





Members of Group:

- Abegg, Donald
- Albinak, Gina

Data Prepopulated into the Form

Complete Form

The **Name** and the **Instructions** display at the top of the form. A warning icon  displays in the upper right corner of the screen if there are any errors, such as missing required fields or overfilled fields. Click this button to navigate through the errors on the form. A checkmark icon  displays after all errors have been fixed.

A draft of the form can be saved with rule errors. However, a draft of the document will not save if there are overfilled fields.

Custom Form - 18-19 Military Connections Survey

Instructions
Certain fields auto-populate based on the person's record, reducing the amount of data entry.

Office of School Administration
Department of Student Services
(651)123 - 4567 • example@doe.com

18-19 Military Connections Survey

New for the 2018-2019 school year, the Department of Public Instruction is requiring school districts to annually collect information from Military Connected Families. If a parent or guardian is connected to the U.S. Military, we are asking that they answer the following questions and indicate the Military Connected Parent(s)/Guardian(s)' Name(s) and Date of Birth (DOB). Please disregard if this does not apply to your family.

Please return the form to your child's school by Friday, October 18, 2018.

No, parent or guardian in this household is a member of the military.

Yes, this individual is a member of the military.

Name: Ronald Atwood DOB: 03/31/1978
 Start Date of military service: 01/01/2018 End Date of military service: _____

Please indicate the following information about this service member Parent/Guardian in Military.

What is the current status for this service member? Active Duty, Deployed

What is the Branch of Service for this service member? Army National Guard

Example of Custom Form with Errors

Print

When text entered in a multiline text field on a custom form goes beyond the capacity of space on the page, the overflow text displays on subsequent pages when the form is printed. The text on one page ends with the word **Continued** and a **Letter-Number** combination in parenthesis which indicates where the text is continued on another page. See the [Custom Forms](#) article for additional information concerning the overflow functionality.

For example, if a text field ends with "Continued A1," the text is continued on an overflow page labeled **Appendix A1** (see image 5 below). The ellipsis (...) under the Appendix label indicates the text is continued from a previous page.

