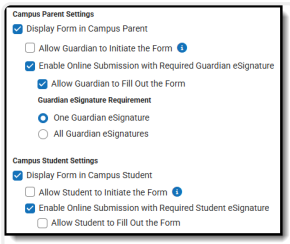
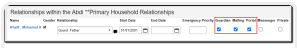
Custom Forms on Portal Process

Last Modified on 10/15/2026 9:25 am CDT

Custom Forms can be set up with eSignature functionality to allow parents/guardians and/or students to electronically sign documents available on Campus Parent and/or Campus Student. This document provides an overview of the eSignature process for Custom Forms.

See the following table for a quick setup guide; more instructions for each step are detailed in the rest of the document.

Step	Image *Click to enlarge*
1. On the Custom Forms Upload step, mark the **Display Form in Campus Parent** and/or the **Display Form in Campus Student** and the **Enable Online Submission with Required eSignature** options. The number of guardian eSignatures required can be determined by selecting one of the following options: • **One Guardian eSignature:** Only one guardian signature is required for a staff member to complete the form. When multiple guardians exist for a student, staff can select which guardian receives the form from the Forms tool. When assigning forms via the Form Batch Setup tool, the form is sent to all guardians for the student and the first guardian to sign the form locks out the other guardian from signing the form. • **All Guardian eSignatures:** All student guardians must sign the form for staff to complete it.	 *Display Custom Form on Portal Options*
2. Mark the Portal Preference for the Module the form is in at System Administration > Portal > Preferences > Display Options on the Documents section. Portal preferences are set by school. See the Portal Preferences Display Options documentation for additional information.	 *Display Options for Custom Modules*
3. Save the Custom Form for a student and click the Request eSignatures button. Requesting eSignatures makes the form read-only. You are not be able to make additional changes after requesting signatures.	 *Request eSignatures Button*

Step	Image *Click to enlarge*
4. Parent/Guardian(s) receive the eSignature request(s) when the **Guardian, Mailing,** and **Portal** checkboxes are marked on the Relationships tool for the student. The Parent/Guardian must have a valid Portal account in order to receive eSignature forms. The order of the Parent/Guardian(s) names is determined first by the **Emergency Priority** on the Relationships tool. When no Emergency Priority is entered, the names display in alphabetical order.	 *Relationship Checkboxes for eSignature*

Custom Form Portal Setup

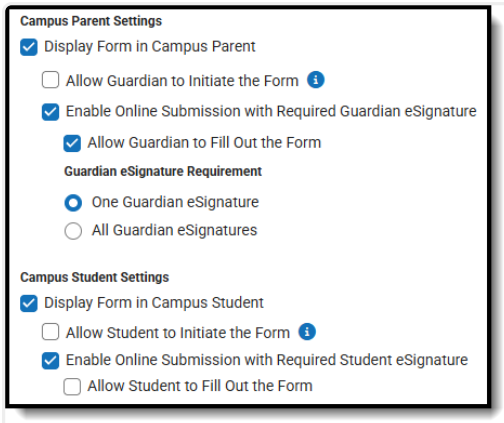
User: Custom Forms Administrator

Path: Student Information > Custom Forms and Custom Modules > Custom Form Setup

Portal options are available on the Upload step of the Custom Forms process. When the **Display Form in Campus Parent** and/or the **Display Form in Campus Student** and the **Enable Online Submission with Required eSignature** option are marked, a request for an electronic signature is sent to the student and/or parent/guardian(s) on Campus Parent and/or Campus Student. Either one or all guardian signatures can be selected. When the **Allow Guardian to Fill Out the Form** and/or **Allow Student to Fill Out the Form** options are marked, guardians and students can also enter data into the form.

Administrators can also configure the form to allow guardians and/or the student to print it or start it from the Portal. Mark the **Display Form in Campus Parent** and/or the **Display Form in Campus Student,** and the **Allow Guardian to Initiate the Form** and/or **Allow Student to Initiate the Form** options. This allows guardians and students to print the blank form. When the online submission option is also enabled, guardians and students can initiate the form process from the Portal.

Only PDFs created using Adobe Acrobat Professional or Adobe DC are supported for Custom Form creation. See the Custom Forms Setup document for additional information on managing and creating Custom Forms.



Display Custom Form on Portal Options

Note: Custom Form eSignature functionality does not require a PIN to complete.

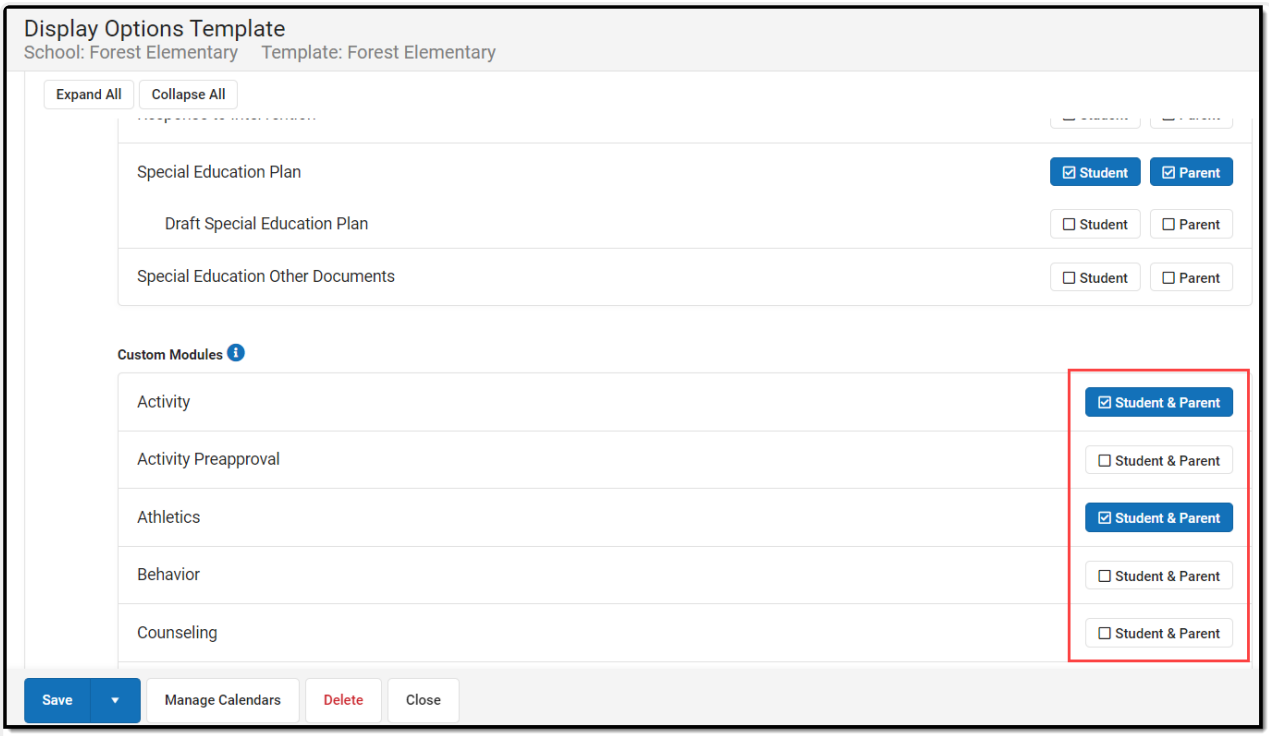
Portal Display Options

User: Custom Forms Administrator

Path: System Settings > Portal Preferences > Portal

The Display Option must be marked per module for custom forms to display on the Portal for parents/guardians and students. Select the Student & Parent option under the Custom Modules section for each module you want to display on Portal.

Portal preferences are set by school. See the Portal Preferences Display Options documentation for additional information.



Document Display Options for Custom Forms

Relationship Setup

User: Custom Forms Administrator

Path: Census > People > Relationships

Parent/Guardian(s) receive the eSignature request(s) when the **Guardian, Mailing,** and **Portal** checkboxes are marked on the Relationships tool for the student. The Parent/Guardian must have a valid Portal account to receive eSignature forms. The order of the Parent/Guardian(s) names is determined first by the **Emergency Priority** on the Relationships tool. When no Emergency Priority is entered, the names display in alphabetical order.



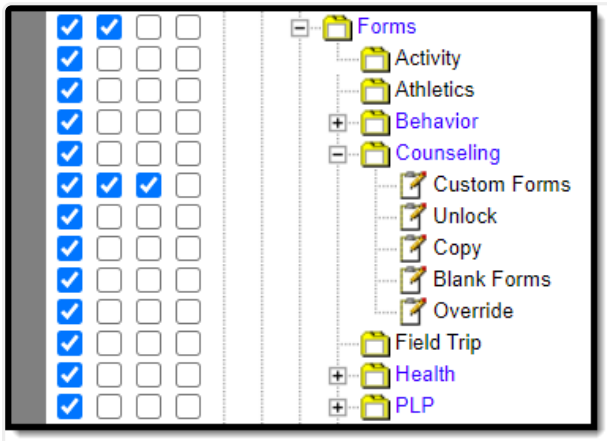
Relationship Checkboxes for eSignature

Tool Rights

User: Custom Forms Administrator

Teachers/Form users must have appropriate tool rights to create custom forms using the Forms tool. There is not a separate tool right for eSignature forms. When users have the Module Custom Forms Read, Write, and Add rights, they can create new custom forms for a student, including eSignature forms.

Overriding eSignatures requires a separate tool right. Users must have the *Student Information > General > Forms > Module > Custom Forms = Write* and *Override = Read* in order to override an eSignature.



eSignature Tool Rights

Send Forms

User: Teacher/Forms User

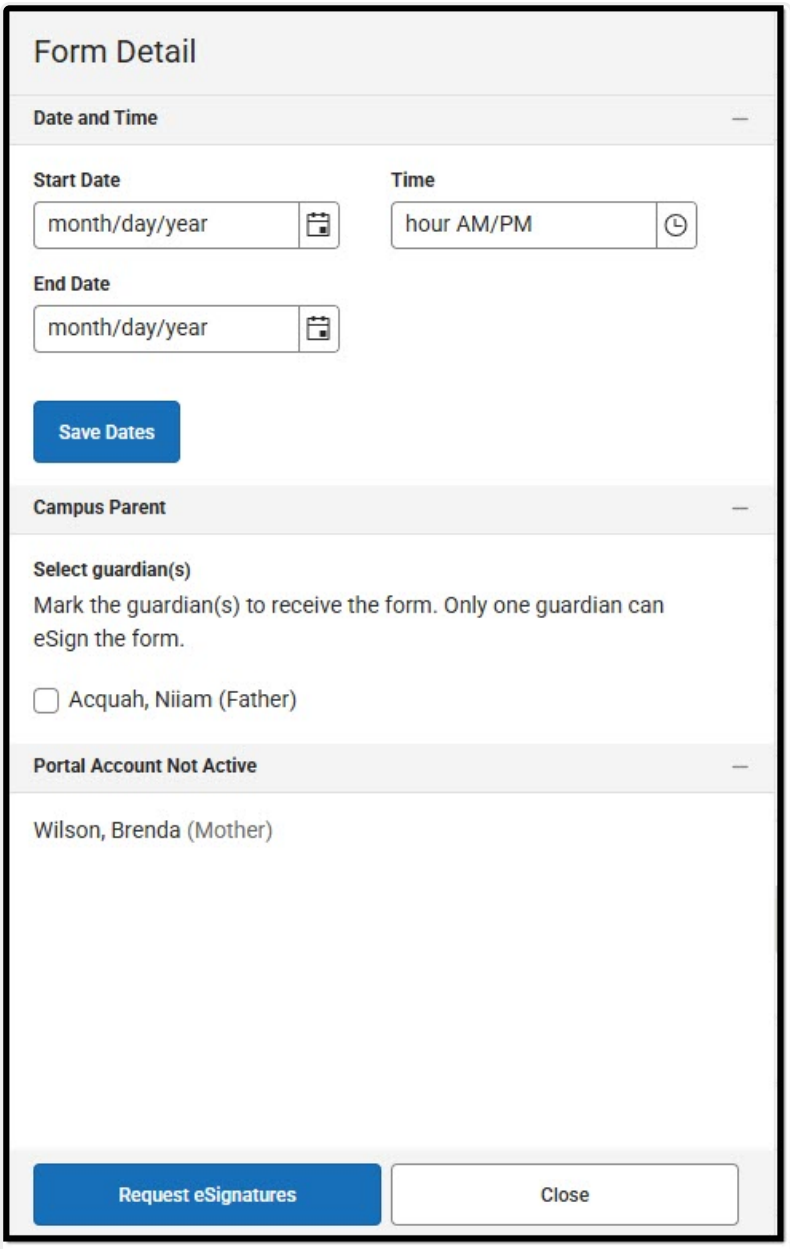
Path: Student Information > General > Forms

The **Review Participants** button displays after an initial save. When finished entering data into the form, click the **Review Participants** button to verify to whom the form is being sent and send eSignature request(s). The Form Detail also allows the user to select when the Form is sent (**Start Date** and **Time**) and when it becomes read-only on the Portal (**End Date**).

When multiple guardians exist for a student, and only one signature is required, staff can select which guardian(s) receives the form. Staff can send the form to multiple guardians, but whichever guardian signs the form first prevents the other guardian(s) from signing. The other guardian(s) can still view the form. See the Custom Forms Setup tool article for information about the guardian requirement settings.

Guardian(s) without active portal accounts display in the **Portal Account Not Active** section.

Custom Forms with eSignature do not display on the Documents tool. They can only be accessed using the Forms tool.



Review Participants Side Panel

Request eSignature(s) Process

1. Enter data into the form.
2. Click **Review Participants.**
3. Optional: Select a **Start Date** and **Time** when the form is available on the Portal, after eSignatures have been requested.
4. Optional: Select an **End Date** after which the form becomes read-only on the Portal.
5. When multiple guardians exist, and only one signature is required, select which guardian(s) will receive the form. When all guardian signatures are required, no guardian selection can be made.
6. Click **Request eSignatures** or **Cancel**. Requesting eSignatures make the form read-only. You are not be able to make additional changes after requesting signatures.

After the eSignature Request(s) have been sent, the **Review Participants** button can be used to

see the status per person and override eSignatures and/or enter a contact log record. Statuses include:

- **Signed**: The person signed the form.
- **Declined**: The person declined the form.
- **Pending**: The form is awaiting action by the person.
- **In Progress**: The person is currently editing the form. When a person has an In Progress status, their signature cannot be overridden.
- **Overridden**: The teacher has overridden that person's signature.
- **Declined Terms**: The participant declined the Terms and Conditions.

Once an eSignature request has been sent, users cannot delete the form, and it becomes read-only.

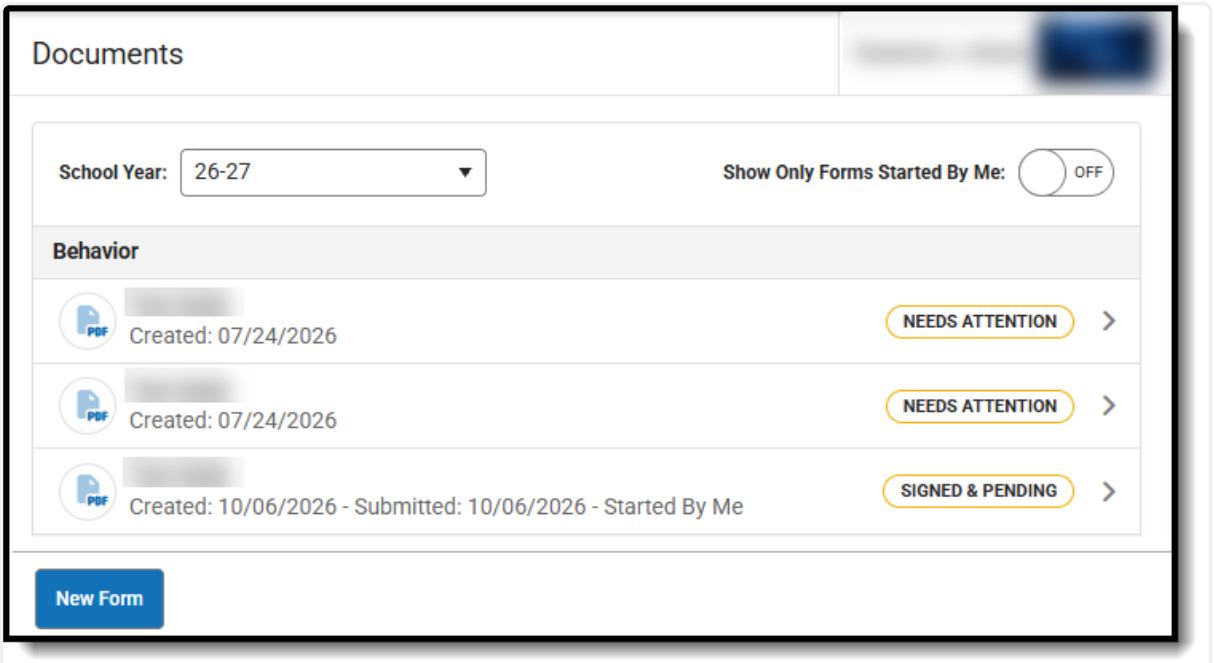
Campus Parent and Campus Student

User: Parent/Guardian or Student

Path: Portal > Documents

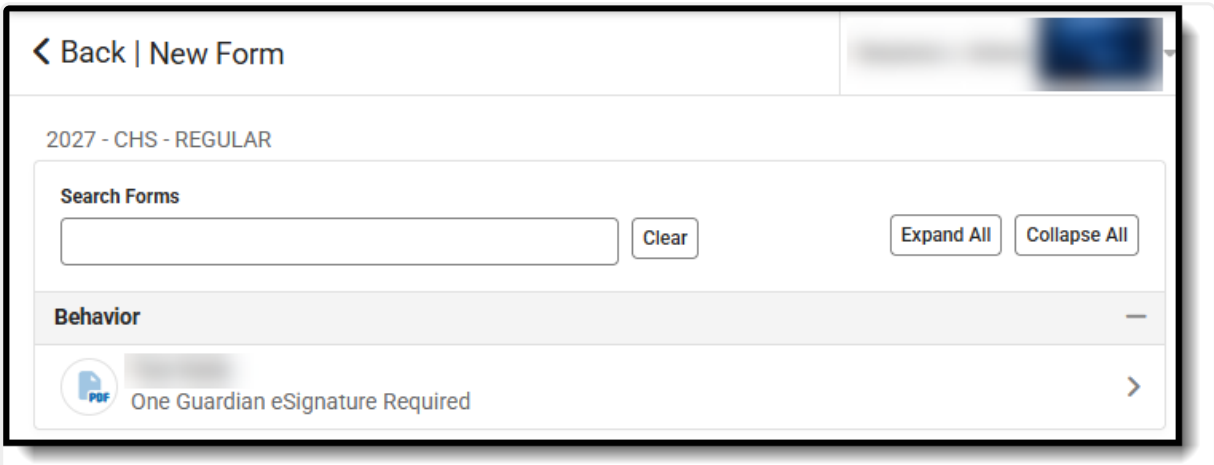
Guardian or Student-Initiated Forms

Certain forms can be printed or started by the guardian and/or student. Users can toggle the **Show Only Forms Started By Me** option to view only forms initiated by the current user.



The Portal Documents tool, showing the New Form button and Show Only Forms Started By Me toggle.

Click the **New Form** button to view the **New Form** selection screen.



The New Form Selection screen with one form available.

Available forms are organized by module. Use the **Search Forms** field, and/or the **Expand All** and **Collapse All** buttons to find the desired form.

Select the desired form. Read-only forms can be printed. Click **Start** for forms that require data entry and eSignature(s). Guardians and/or students must accept the terms and conditions to proceed with filling out the form and signing. Certain forms may require both data entry and a signature.

The **Next Action** button navigates you to the next required field or the eSignature line when no other fields are required. Once all edits are made, sign the form and click **Submit**.

After one guardian saves a form, but before they submit it, the form becomes available as read-only for the other guardian(s) and/or the student. They will receive a notification and information

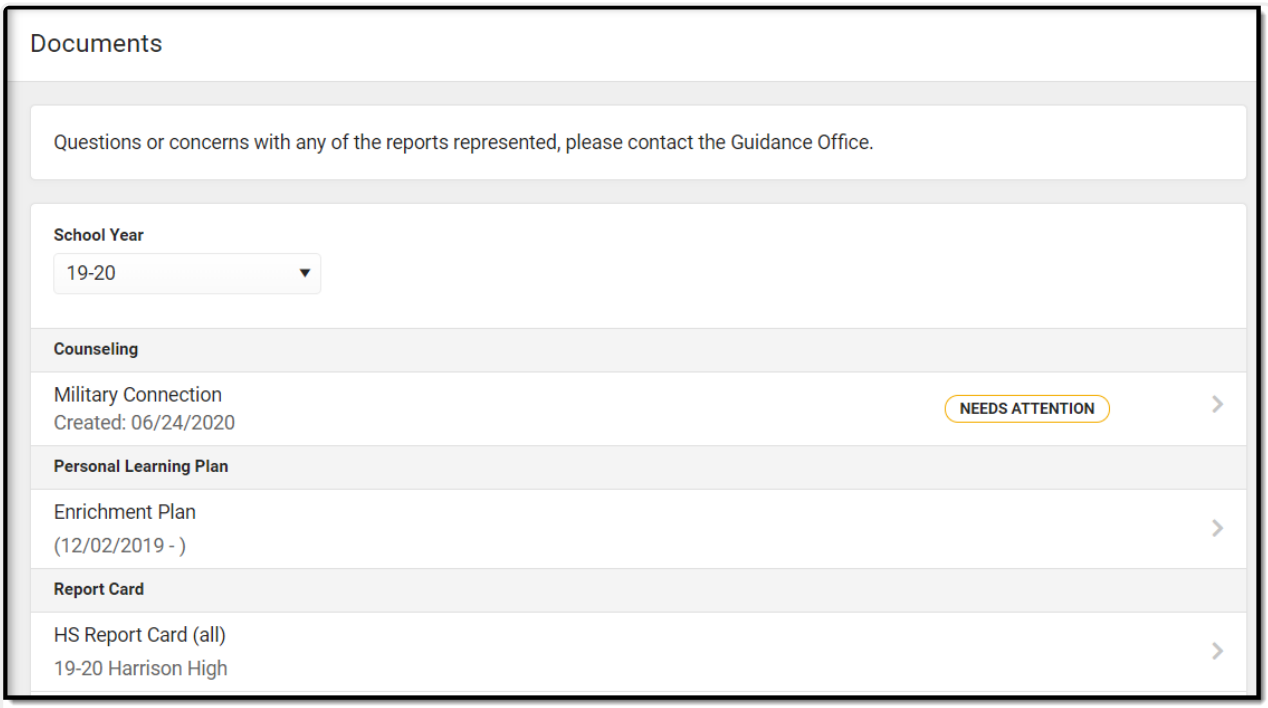
upon logging in in the **Documents Need Attention** section. After the first guardian has submitted the form, the other guardian(s) and/or students will be able to electronically sign it when multiple signatures are required.

Staff-Initiated Forms

Upon login, the **Documents Need Attention** section displays any documents that require a signature. Notifications can also be sent to the user when a document is available to sign and/or fill out. Click on the document name or navigate to the Documents tool to sign or decline the form.

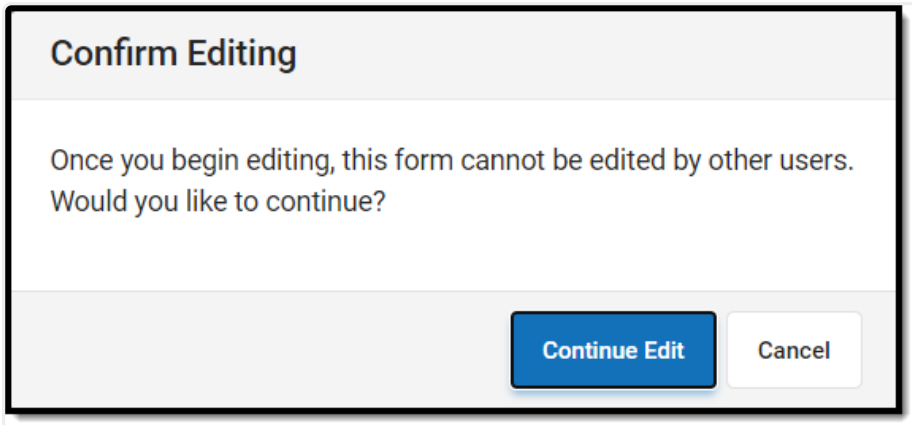
A status displays next to the name of the form on the Documents tool. A **Needs Attention** status indicates that action is required by the current user. A **Signed and Pending** status indicates the form has been signed and submitted by the current user.

When one person declines a form, no other user can eSign the form.



eSignature Document on Campus Parent/Campus Student Portal

Certain forms may require both data entry and a signature. Only one user can edit the form, even when multiple users have the ability to edit. A warning displays indicating that the form will become read-only for other users until you finish editing and sign it. Other users can view a read-only version of the form while you edit.



Confirm Editing Warning

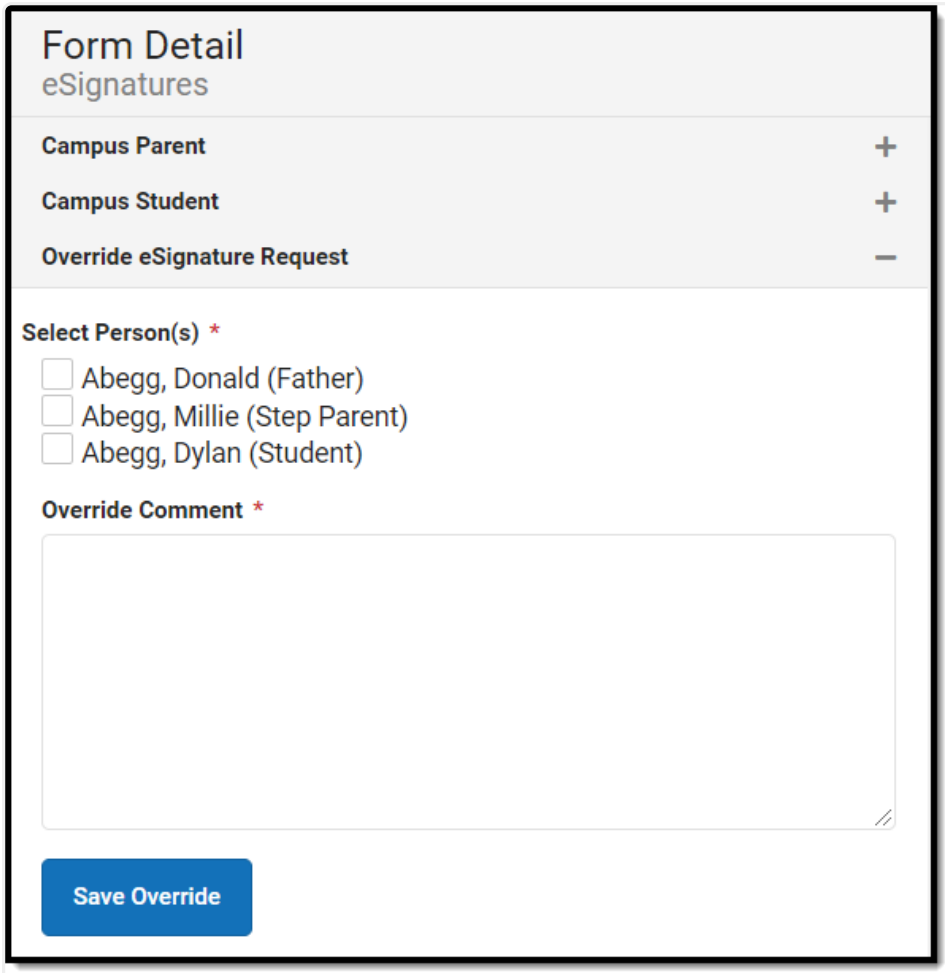
The **Next Action** button navigates you to the next required field or the eSignature line when no other fields are required for data entry. Once all data entry is complete, sign the form and click **Submit**.

Override eSignatures

User: Teacher/Forms User

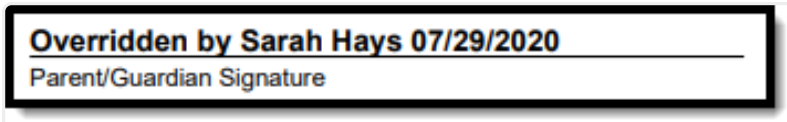
Path: Student Information > General > Forms

The Override eSignature Request option forces the eSignature to be signed to complete the form. This option can be used when, for any reason, a parent/guardian or student is unable to eSign or a paper form is signed and submitted instead of the virtual form.



Override eSignature Request

1. Click **Review Participants** after the eSignature request(s) have been sent.
2. Mark the checkbox for the person whose signature is to be overridden.
3. Enter an **Override Comment.**
4. Click **Save Override.** The Status of this form after the user **Completes** the form is Locked & Overridden.



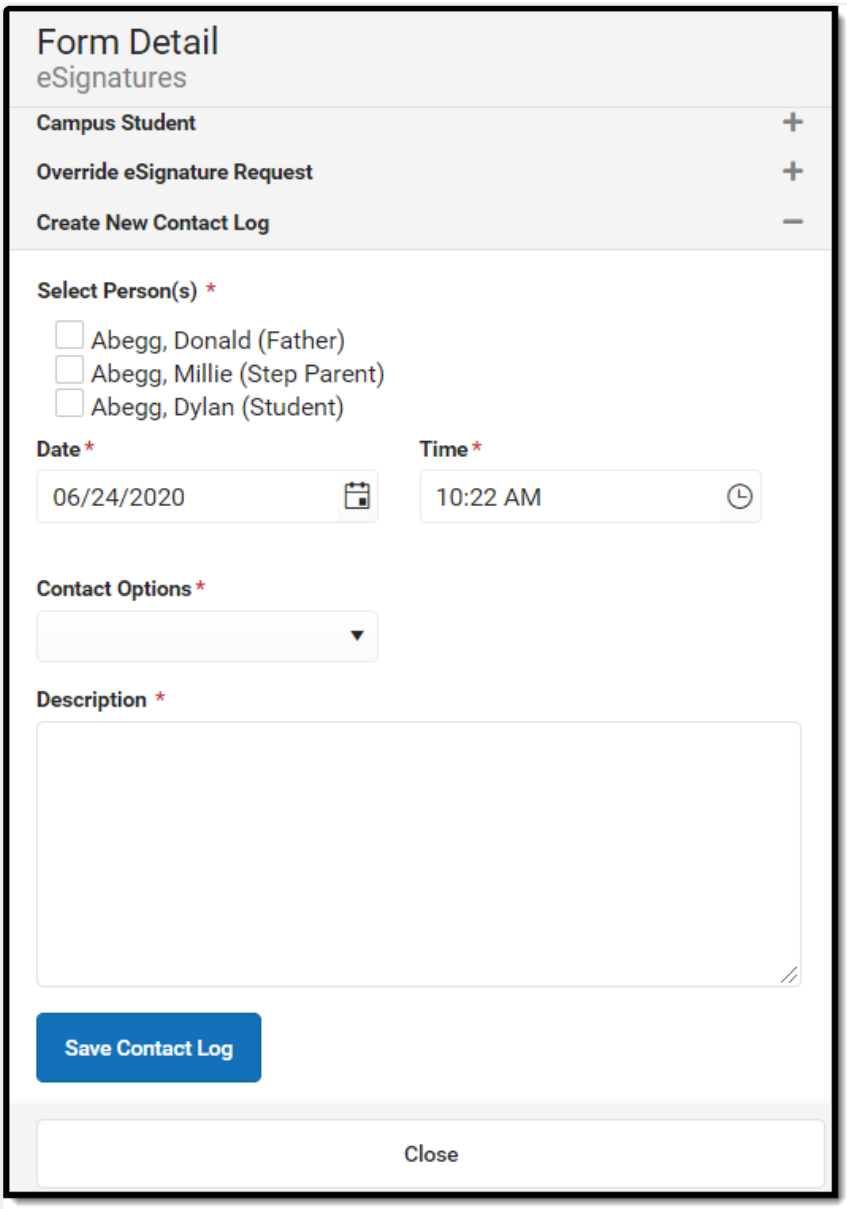
Example Overridden eSignature

Contact Log

User: Teacher/Forms User

Path: Student Information > General > Forms

The Custom Forms Contact Log is used to document any interactions between the participants of the Custom Form.



eSignature Contact Log

1. Click **Review Participants** after the eSignature request(s) have been sent.
2. Mark the checkbox for the person who was contacted.
3. Select the **Date** and **Time** when the contact occurred.
4. Select the **Contact Options** from the dropdown. This dropdown is populated from the Attribute Dictionary > ContactLog > Contact Type.
5. Enter a **Description** of the communication.
6. Click **Save Contact Log.** Multiple Contact Log records can be saved per form. Contact Log records can be created any time after the eSignature request(s) have been sent, including after the form is Completed.

Complete eSignature Forms

User: Teacher/Forms User

Path: Student Information > General > Forms

Once eSignatures have been returned or overridden, the form can be completed. Click **Complete** to finish the eSignature process.

eSignature Custom Forms do not sync to the state for State Edition users when completed.