

Custom Forms on Portal Process

Last Modified on 12/14/2025 8:45 pm CST

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

For eSignature Custom Forms to display on Portal, the following setup must be done:

1. On the [Custom Forms Upload](#) step, mark the **Campus Parent/Campus Student** AND the **Request eSignature** options. The number of eSignatures required can be determined by selecting one of the following options:
 - **One Guardian eSignature Required to Complete** - 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 Required to Complete** - All student guardians must sign the form for staff to complete it.
 - The only student eSignature option is **Student eSignature Required to Complete**.
- Mark the Portal Preference for the Module the form is in at System Administration > Portal > Preferences > [Display Options](#) on the Documents section.
- Mark the **Guardian, Mailing,** and **Portal** checkboxes on the [Relationships](#) tool for the person to receive the Custom Form.

See each section of the document below for detailed instructions.

Custom Form Portal Setup

User: Custom Forms Administrator

Tool Search: Custom Forms

Portal options are available on the Upload step of the Custom Forms process. When the **Display Custom Form on Portal** option and **Guardian eSignature Request** and/or **Student**

eSignature Request 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 **Guardian Fill out Form** and/or **Student Fill out Form** option is marked, guardians and students can also enter data into the form.

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

☒ Campus Parent

Guardian eSignature Requirement

☐ No eSignature Required to Complete

☒ One Guardian eSignature Required to Complete

☐ All Guardian eSignatures Required to Complete

☐ Guardian Fill out the Form

☒ Campus Student

☒ Student eSignature Required to Complete

☐ Student Fill out the Form

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

Tool Search: 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.

Display Options Template

School: Forest Elementary Template: Forest Elementary

Expand All

Collapse All

Special Education Plan	<input checked="" type="checkbox"/> Student	<input checked="" type="checkbox"/> Parent
Draft Special Education Plan	<input type="checkbox"/> Student	<input type="checkbox"/> Parent
Special Education Other Documents	<input type="checkbox"/> Student	<input type="checkbox"/> Parent

Custom Modules ⓘ

Activity	<input checked="" type="checkbox"/> Student & Parent
Activity Preapproval	<input type="checkbox"/> Student & Parent
Athletics	<input checked="" type="checkbox"/> Student & Parent
Behavior	<input type="checkbox"/> Student & Parent
Counseling	<input type="checkbox"/> Student & Parent

Save

Manage Calendars

Delete

Close

Document Display Options for Custom Forms

Relationship Setup

User: Custom Forms Administrator

Tool Search: 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.

Relationships within the Abdi **Primary Household Relationships

Name	Gender	Relationship	Start Date	End Date	Emergency Priority	Guardian	Mailing	Portal	Messenger	Private
Khalif , Mohamed A	M	Guard: Father	01/01/2001			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

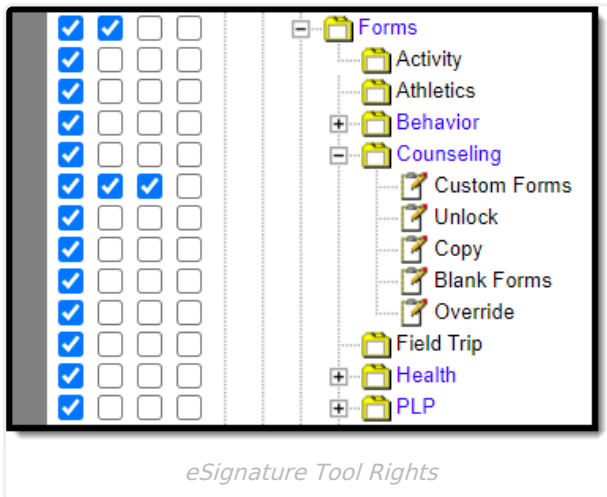
Relationship Checkboxes for eSignature

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.



Send Forms

User: Teacher/Forms User

Tool Search: 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 are not available on the Documents tool.

Form Detail

Date and Time

Start Date

month/day/year

Time

hour AM/PM

End Date

month/day/year

Save Dates

Campus Parent

Select guardian(s)

Mark the guardian(s) to receive the form. Only one guardian can eSign the form.

☐ Acquah, Niiam (Father)

Portal Account Not Active

Wilson, Brenda (Mother)

Request eSignatures

Close

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

Tool Search: N/A

Upon login, the **Documents Need Attention** section displays any documents that require a signature. Notifications can also be received notifying the user 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. This indicates the document is pending action by other users, including additional signatures needed or completion by the district.

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

Documents

Questions or concerns with any of the reports represented, please contact the Guidance Office.

School Year

19-20

Counseling

Military Connection

Created: 06/24/2020

NEEDS ATTENTION

>

Personal Learning Plan

Enrichment Plan

(12/02/2019 -)

>

Report Card

HS Report Card (all)

19-20 Harrison High

>

eSignature Document on Campus Parent/Campus Student Portal

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

Confirm Editing

Once you begin editing, this form cannot be edited by other users.
Would you like to continue?

Continue Edit

Cancel

Confirm Editing Warning

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**.

Override eSignatures

User: Teacher/Forms User

Tool Search: 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.

Form Detail

eSignatures

Campus Parent

+

Campus Student

+

Override eSignature Request

-

Select Person(s) *

☐ Abegg, Donald (Father)
 ☐ Abegg, Millie (Step Parent)
 ☐ Abegg, Dylan (Student)

Override Comment *

Save Override

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.

Overridden by Sarah Hays 07/29/2020
Parent/Guardian Signature

Example Overridden eSignature

Contact Log

User: Teacher/Forms User

Tool Search: Forms

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

Form Detail

eSignatures

Campus Student

+

Override eSignature Request

+

Create New Contact Log

-

Select Person(s) *

☐ Abegg, Donald (Father)
 ☐ Abegg, Millie (Step Parent)
 ☐ Abegg, Dylan (Student)

Date *

06/24/2020

Time *

10:22 AM

Contact Options *

Description *

Save Contact Log

Close

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

Tool Search: 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.