Special Ed eSignature Process

Last Modified on 10/21/2026 10:56 am CDT

Path: Student Information > Special Ed > Special Ed Documents

Special Ed Documents can be set up to allow parents/guardians and/or students to electronically sign documents made available on Campus Parent and/or Campus Student. Both Locked and Draft Special Ed IEPs, Evaluations, Progress Reports, and Prior Written Notices (Ohio only) display on the Portal. Parents/guardians and students can review these documents and then electronically sign a consent form attesting to the document's accuracy. Certain state users also have additional eSignature functionality.

This article documents the different ways Special Ed Documents can be signed. One way is to use the Custom Forms eSignature functionality within Campus; another is a third-party program such as DocuSign. Also listed is the core eSignature solution for those states that have it. See the following state articles for information on each state's specific information:

- Delaware
- Massachusetts
- Nebraska
- Nevada
- North Dakota
- Pennsylvania
- South Dakota
- North Dakota
- Wisconsin

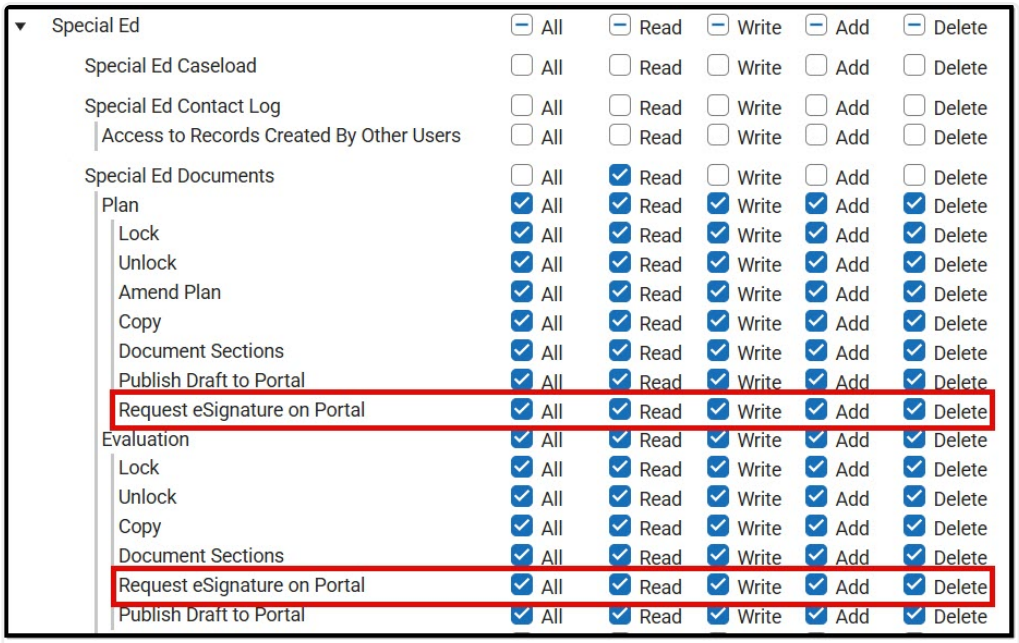
Note: The Custom Form eSignature functionality is only available on the Forms tool.

Setup

Tool Rights

Path: User Management > User Groups > Tool Rights

Make sure the user requesting the eSignature has the appropriate tool rights to **Request eSignature on Portal** (Student Information > Special Ed > Special Ed Documents > Plan/Evaluation > Request eSignature on Portal). This tool right is either on or off, meaning assigning any of the RWAD rights allows the user to send an eSignature request. For example, marking the Delete checkbox grants the same rights as marking the Read checkbox.

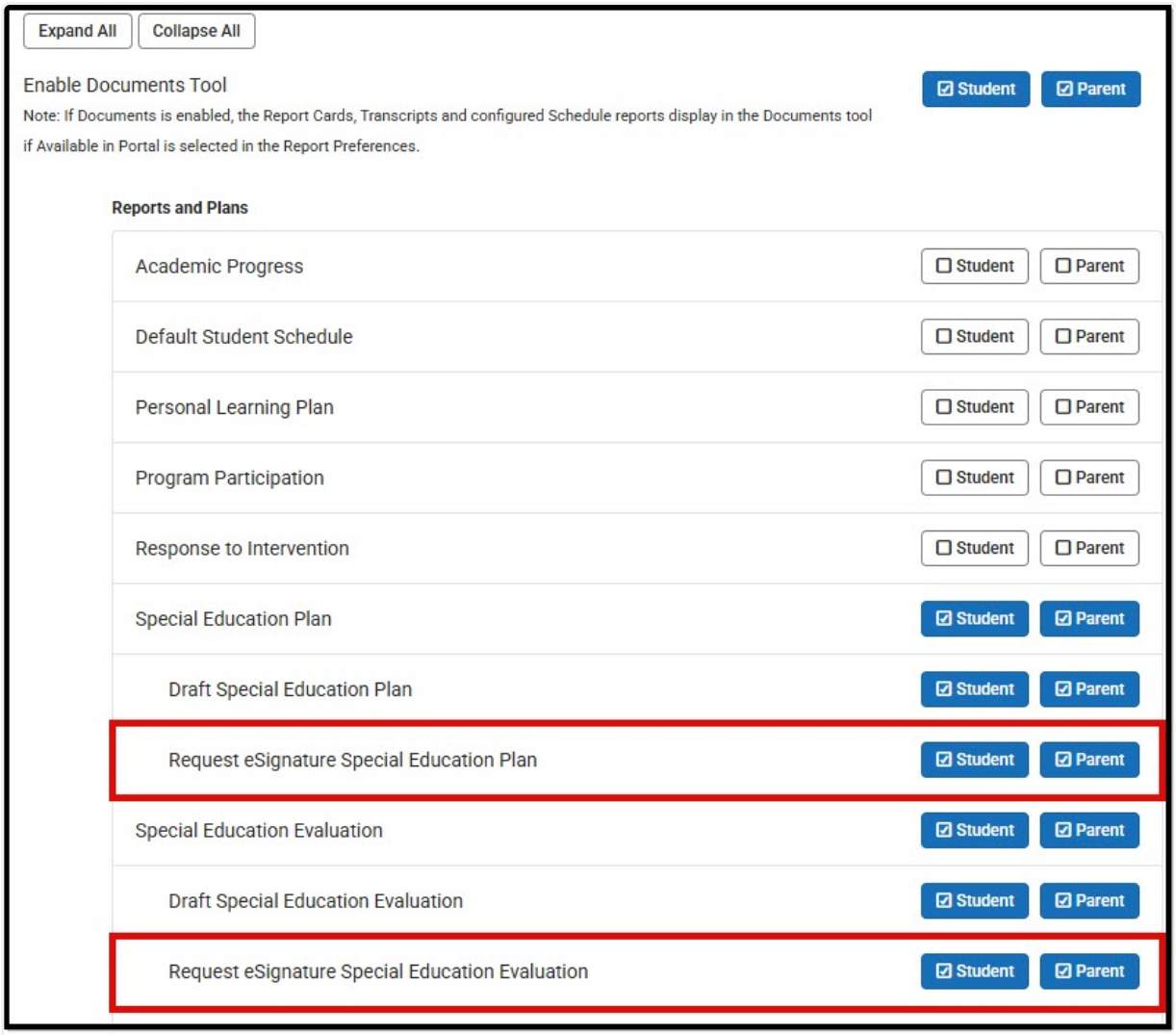


Request eSignature on Portal Tool Right

Set Portal Preferences

Path: System Settings > Portal Preferences > Portal Display Options

Mark the Portal Preference Display option(s), **Request eSignature Special Education Plan** and/or **Request eSignature Special Education Evaluation** for Parent (Display Options > Documents > Reports and Plans > Request eSignature Special Education Plan/Request eSignature Special Education Evaluation). Marking Student sends the student a read-only copy of the plan or evaluation.

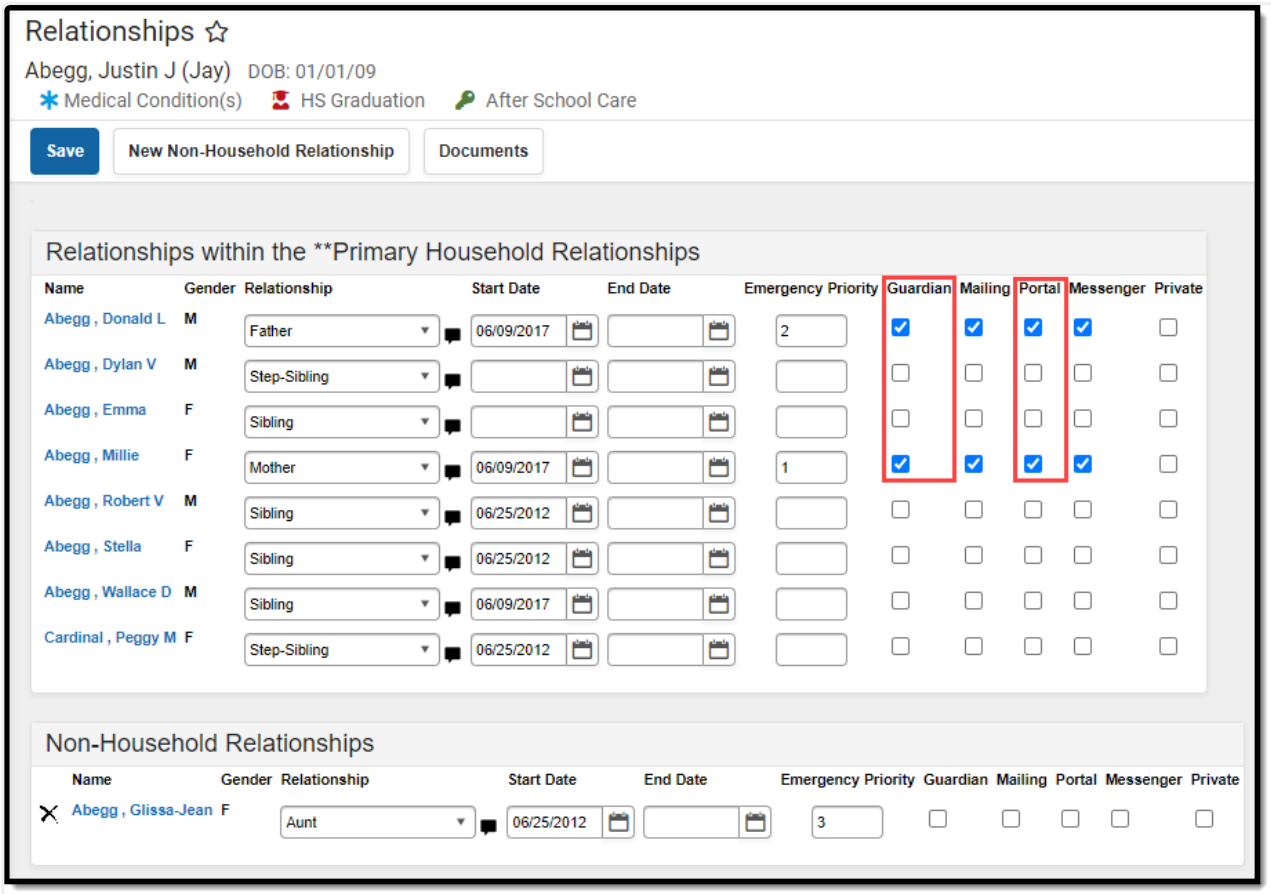


Request eSignature Special Education Documents Portal Display Option

Establish relationships and Portal accounts

Path: Census > People > Relationships

Guardians are eligible to receive an eSignature request when the **Guardian** and **Portal** checkboxes are marked on the student's Relationships tool. The guardian must have logged into the Portal at least once to receive the eSignature request.



Relationships Tool Guardian and Portal Checkboxes

Create and enter plan and/or evaluation information

Path: Student Information > Special Ed > Special Ed Documents

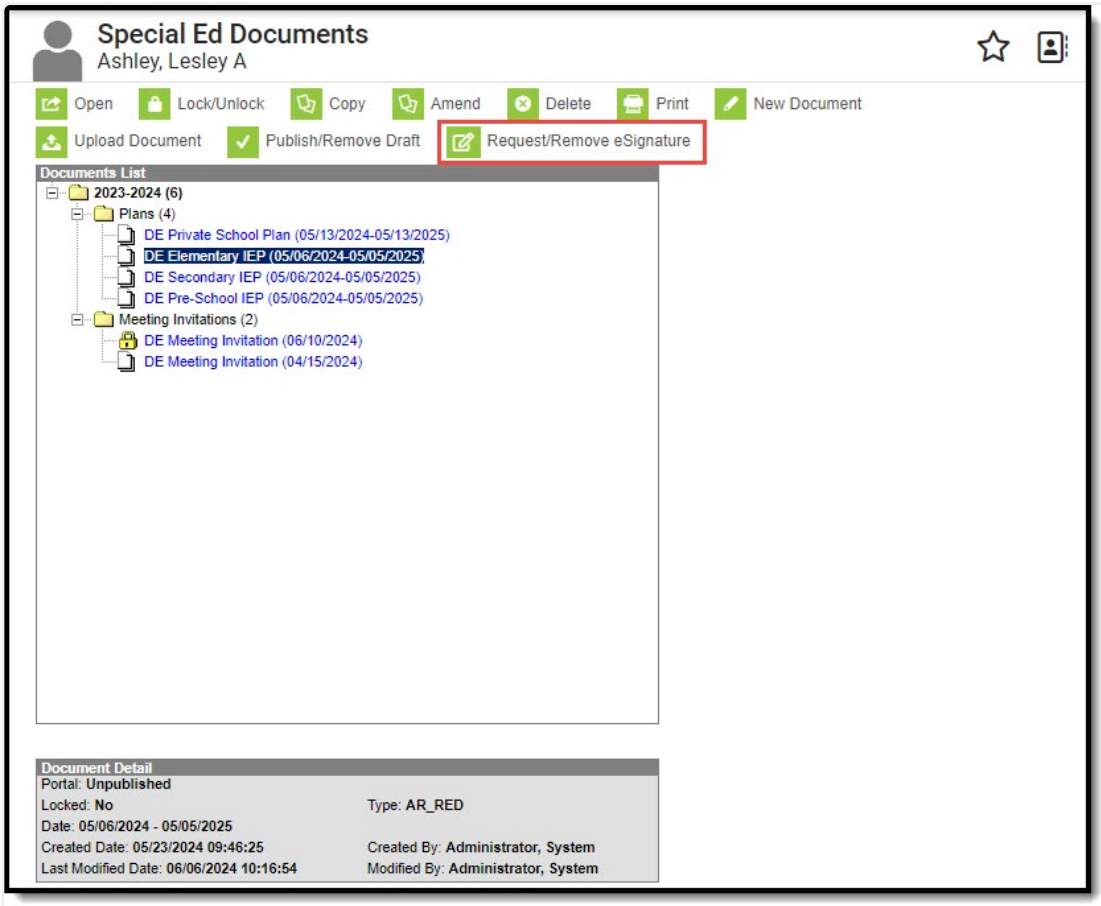
Fill out the plan or evalu in Campus. For information on which editors are required to be electronically signed, see your state's specific articles.

- Delaware
- Massachusetts
- Nebraska
- Nevada
- North Dakota
- Pennsylvania
- South Dakota
- North Dakota
- Wisconsin

Request eSignature

Path: Student Information > Special Ed > Special Ed Documents

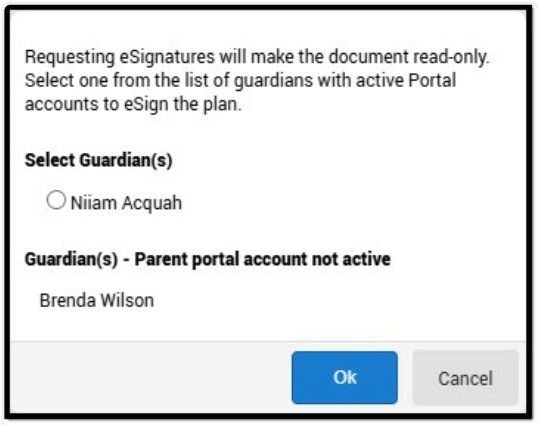
After completing the plan setup, the plan or evaluation is ready to send to the guardian for eSignature. Select the document and then click the **Request/Remove eSignature** button.



Request eSignature on Portal Button

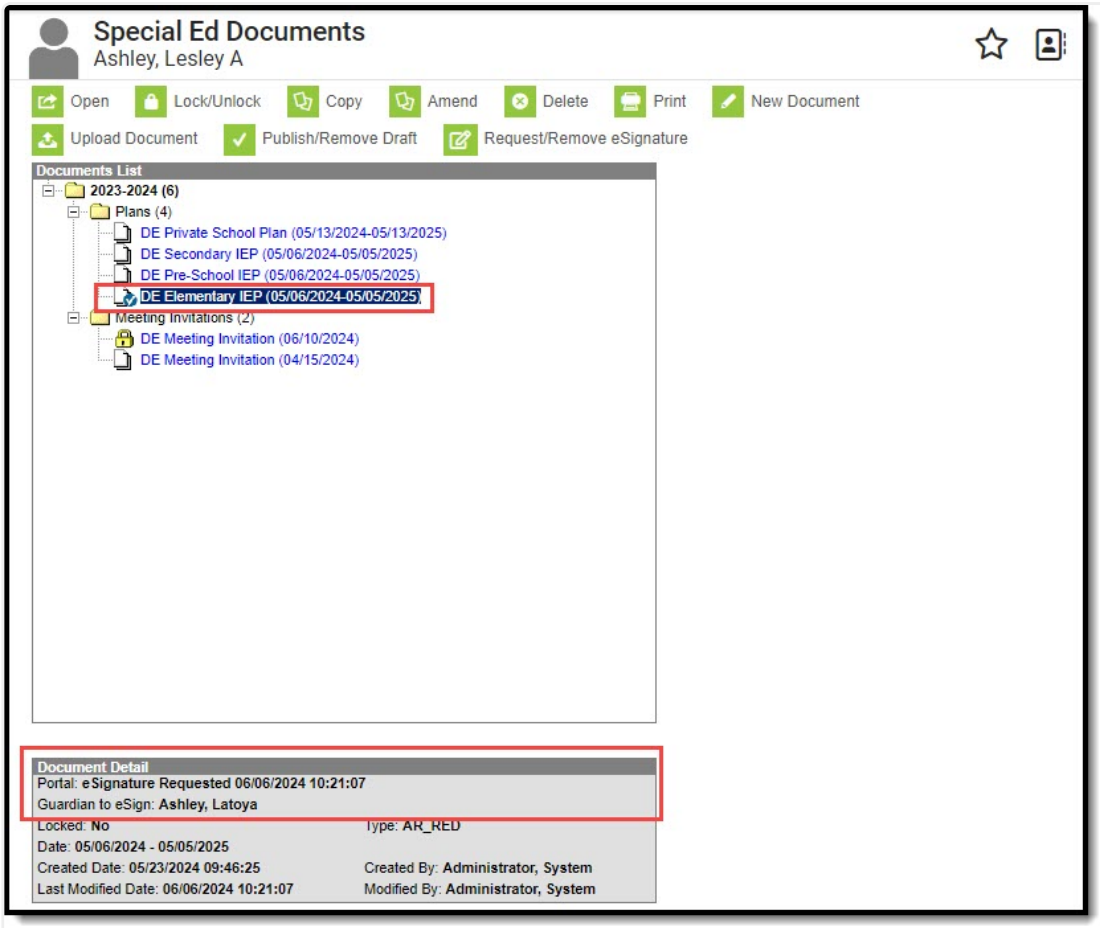
A dialog prompts the user to select one guardian from the list under the **Select Guardians** section. At this time, only one guardian can sign the plan or evaluation.

Guardian(s) without active portal accounts display in the **Guardian(s) - Parent portal account not active** section.



Request eSignature Dialog

Click **Ok** to send the eSignature request. A checkmark icon displays next to the document's name, indicating that it has been successfully sent to the guardian. Information in the Document Detail also lists when the eSignature Request was sent and to which guardian.

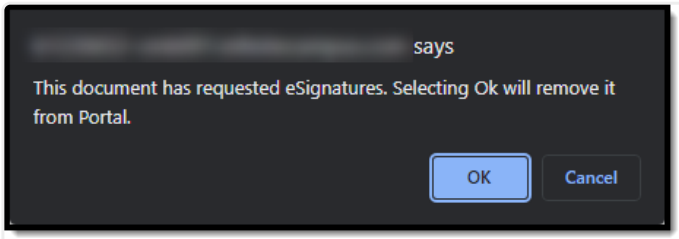


Checkmark Icon and Document Detail eSignature Information

Remove eSignature

The user can pull the plan from the Portal at any time by clicking the **Request/Remove eSignature** button. This allows the user to make changes to the document before the guardian has a chance to sign. A warning displays confirming the removal of the plan from the Portal. Click **Ok** to confirm or **Cancel** to go back.

Removing the document from the Portal after the guardian has signed invalidates those signatures.

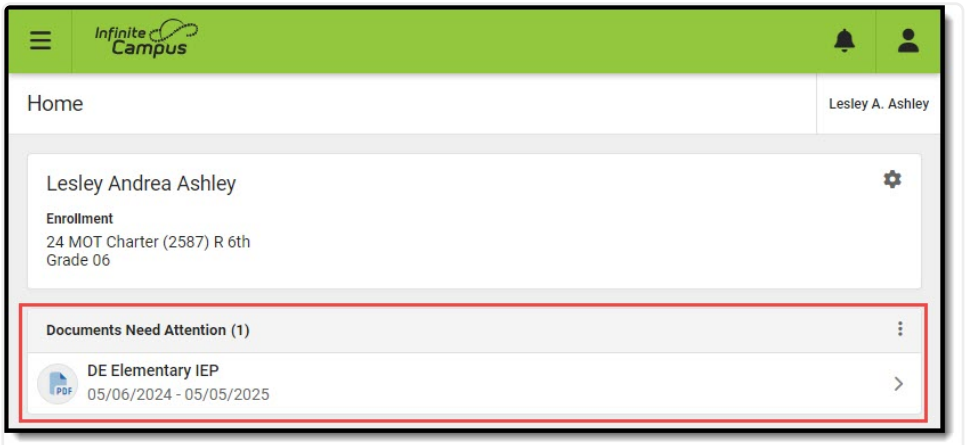


Remove eSignatures Warning

Guardian review

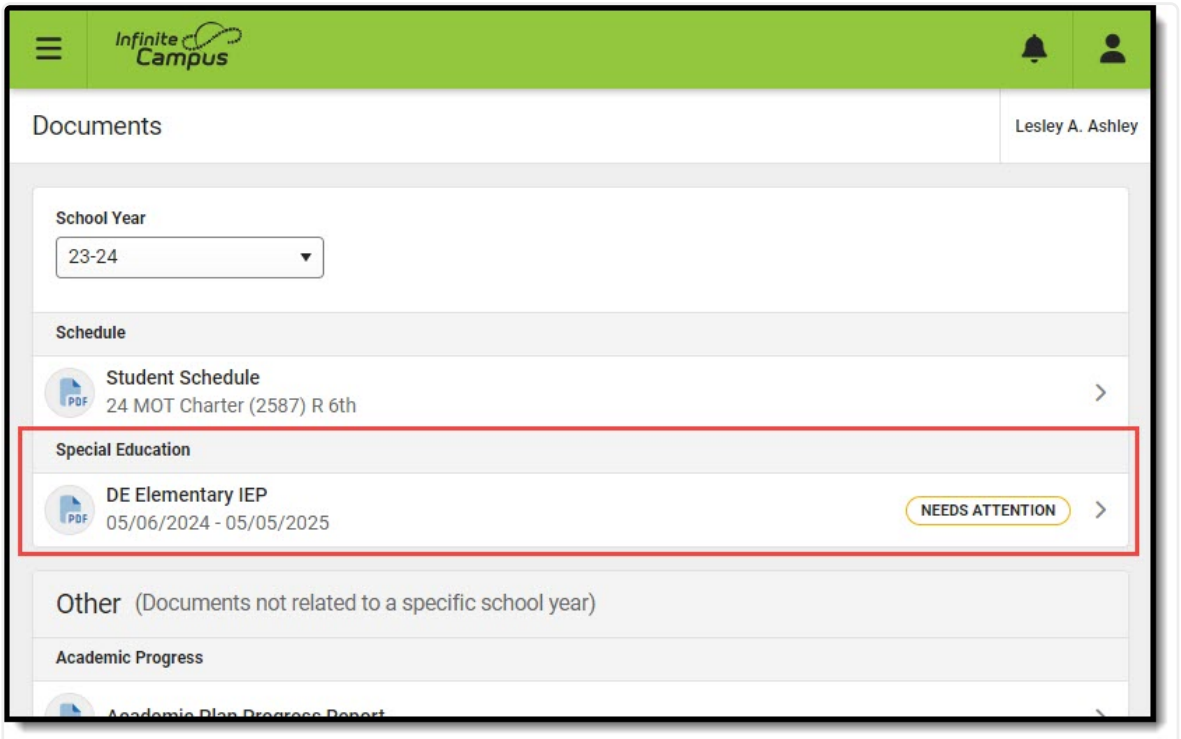
Path: Campus Parent Portal, Campus Student Portal (read-only)

Once an eSignature request has been sent, the guardian can access the document from three locations: a bell notification link, under the Documents Need Attention section on the Home screen, and the Documents tool.



Documents Need Attention on the Home screen

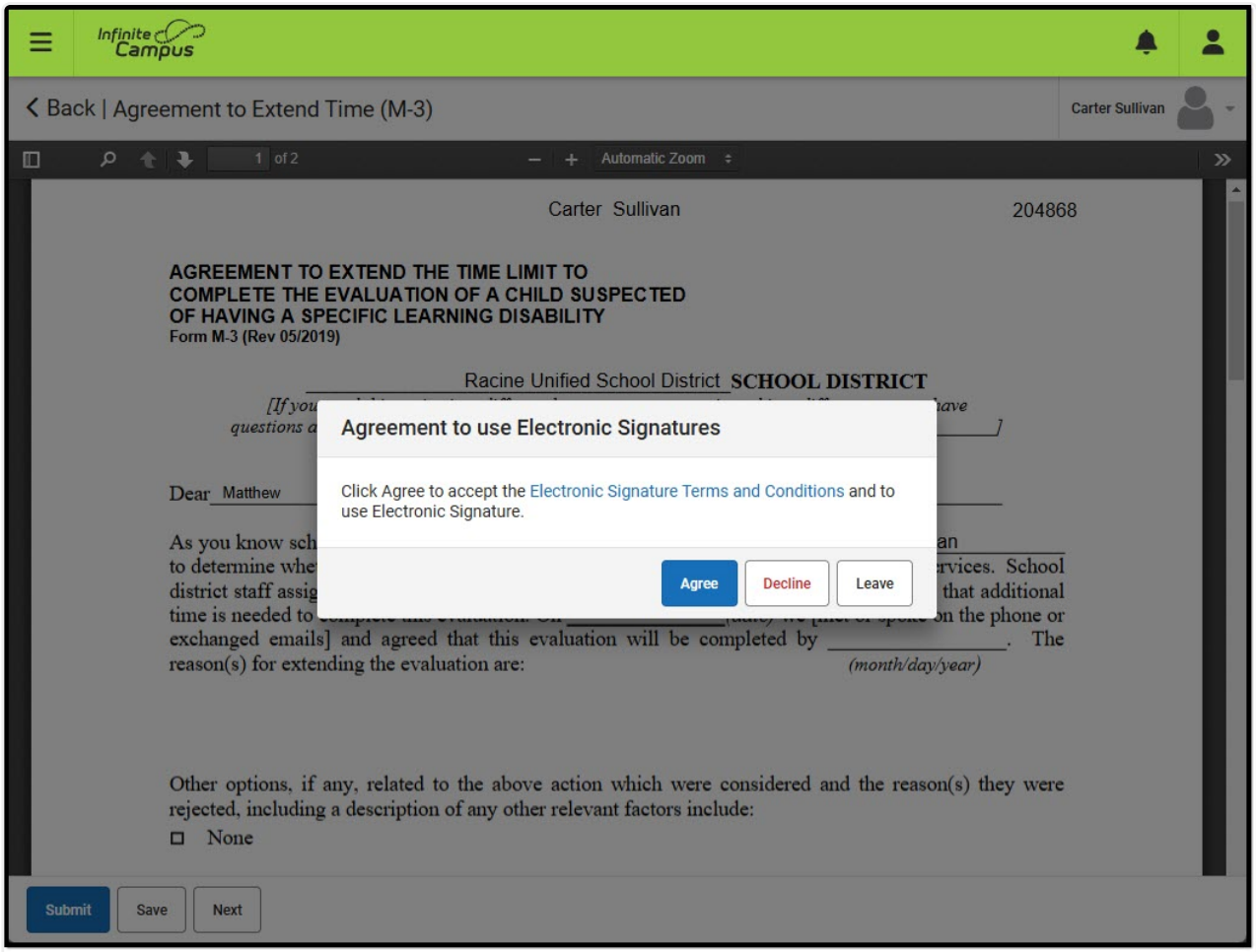
A **Needs Attention** status displays next to the document's name on the Documents tool.



Plan Needs Attention Status on Documents Tool

Terms and conditions

Upon opening the document, the **Terms and Conditions** dialog displays, explaining that the guardian must accept the Terms and Conditions for Electronic Signature before saving and submitting the plan. A link in the dialog opens a PDF detailing the terms.

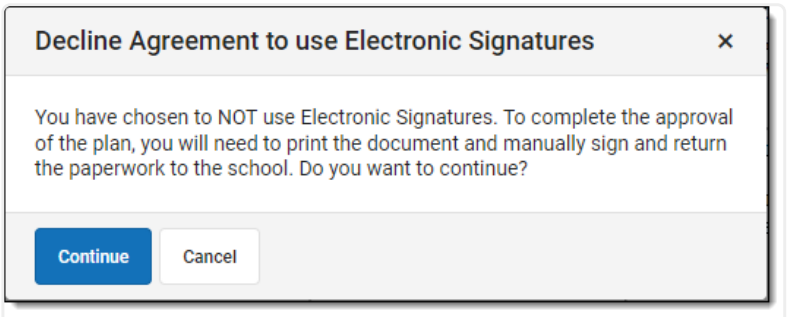


Agreement to Use Electronic Signature Dialog

After the guardian accepts the terms, the Terms window no longer displays.

Decline terms

When the guardian declines the terms, a physical copy of the plan must be printed, signed, and returned to the school. Click the **Decline** button to decline the terms. A dialog displays to confirm the action of declining the terms.



Decline Terms Dialog

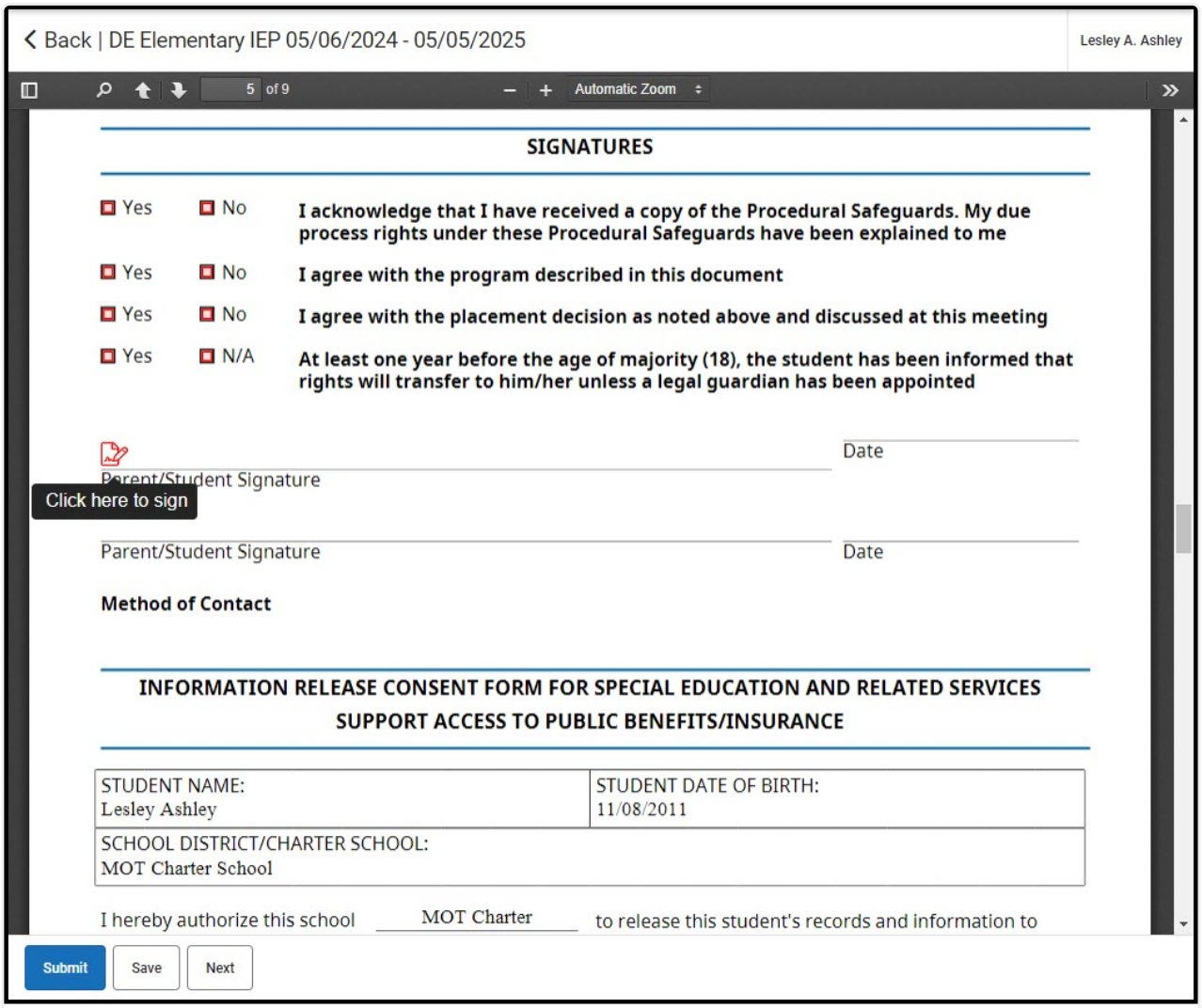
When a guardian declines the terms, the status **Declined Terms and Conditions and Pending** displays next to the document's name in the Documents tool.



Declined Terms and Conditions and Pending Status

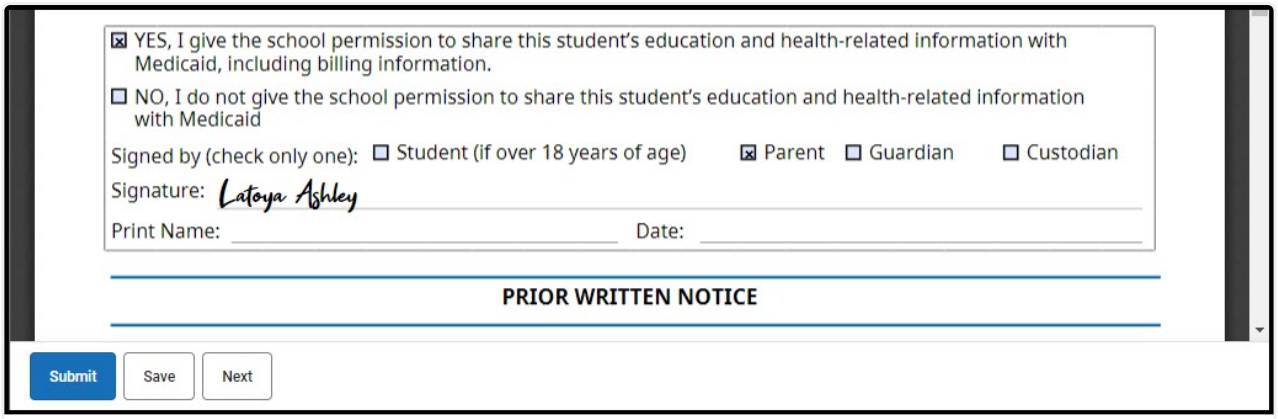
Sign and submit

After agreeing to the terms, several signatures and their corresponding checkboxes must be filled out before the guardian can submit.



Blank eSignature Example

Mark all desired checkboxes in red, then click the paper and pencil icon on the signature lines to sign electronically. The **Next** button navigates the guardian directly to the next item on the plan that needs attention. Click **Save** to save progress.



Completed eSignature Example

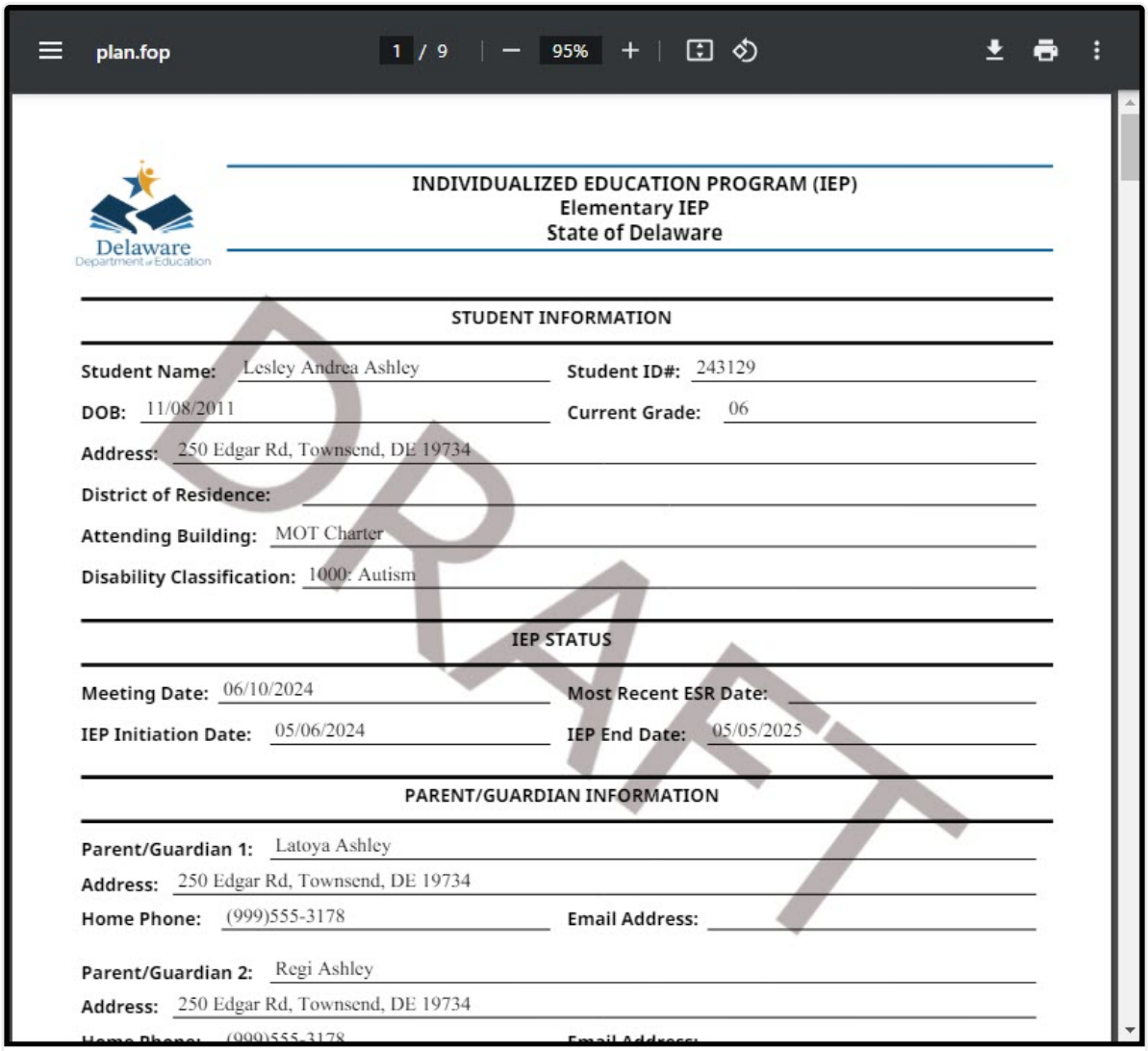
After all signatures are captured and the checkboxes are marked, click **Submit**. In the Documents tool, the **Signed and Pending** status displays next to the document name, and the guardian can view a read-only copy of the document.



Signed and Pending Status

Student and non-signing guardian view

The student and any other guardians who have not been chosen to sign can view a read-only version of the document. A Draft watermark displays, indicating the document has not yet been completed.

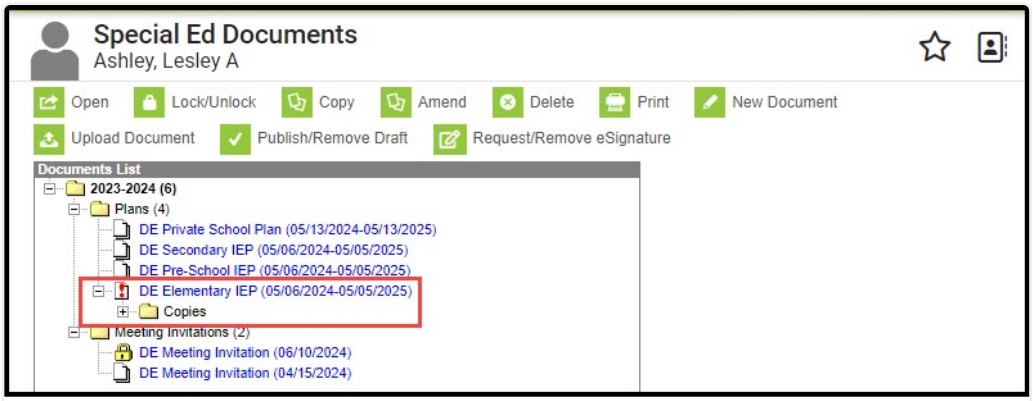


Non-Signing Guardian View

Complete

Path: Student Information > Special Ed > Special Ed Documents

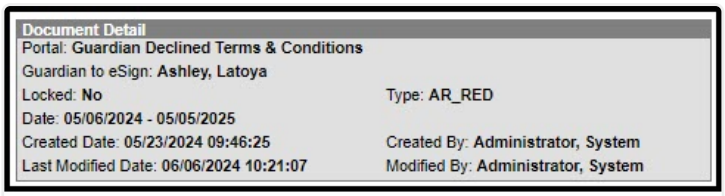
After a guardian has signed OR declined the Terms and Conditions for eSignature, additional completion steps are needed on the Special Ed Documents tool. An exclamation mark icon displays next to the document's name, indicating that action is needed.



Exclamation Mark Icon

Guardian declined terms

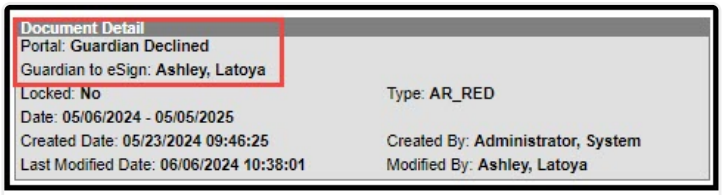
When a guardian declines the Terms and Conditions for eSignature, a message displays on the Document Detail indicating the terms were declined. A physical copy is needed to obtain guardian signatures at this time.



Guardian Declined Terms and Conditions

Guardian declined plan or evaluation

When the guardian accepts the Terms and Conditions but disagrees with the document's contents, the Document Detail indicates that the plan or evaluation was declined, and a PDF copy of the signed document displays in the Copies folder.

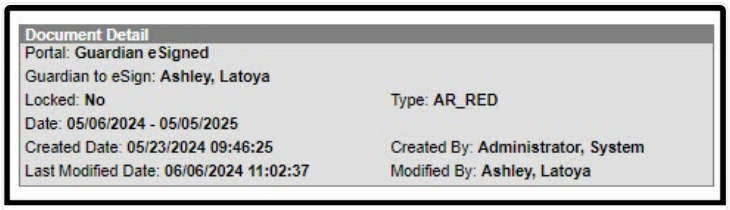


Guardian Declines Plan

Guardian agreed terms and plan or evaluation

When a guardian accepts the Terms and Conditions, agrees to the document's contents, and electronically signs the plan, a message displays on the Document Detail indicating who signed the plan, and a PDF copy of the signed plan displays in the Copies folder.

Any changes made to the document at this stage invalidate the signatures. When changes to the document are needed, an additional eSignature Request must be sent back to the guardian.



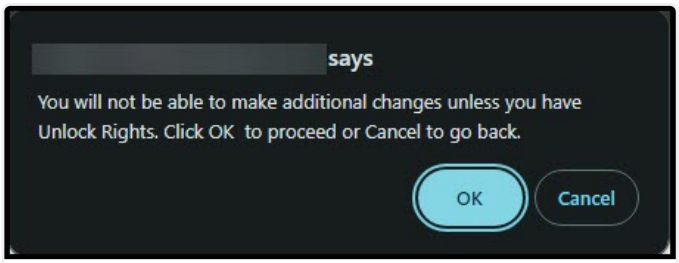
Document Detail Information

Lock

Locking the document completes the process and syncs it to the state.

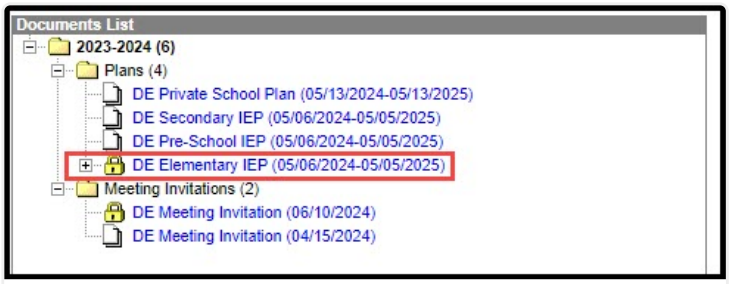
> Additional lock logic may apply when the document is not fully filled out.

Click **Lock** to complete the document process. A warning displays indicating that users are unable to make any changes unless they have additional Unlock Tool Rights.



Lock Warning Message

Click **OK** to proceed. A locked icon displays, indicating the document is locked.

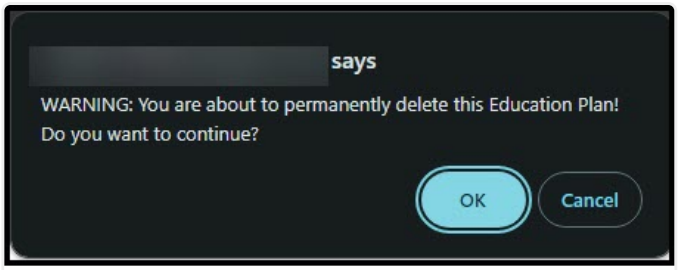


Locked Plan

Delete

> Deleting the original plan or any copies of the plan is NOT recommended.

Only the original document can be deleted if necessary. Copies of the document cannot be deleted unless the original document is removed first, which is NOT recommended. Select the original document and then click **Delete**. A warning displays explaining the consequences of deleting the document.



Delete Plan Warning

Click **OK** to perform the delete or **Cancel** to go back. Any copies of the document now display in the Uploaded Documents folder and can be deleted at this time.

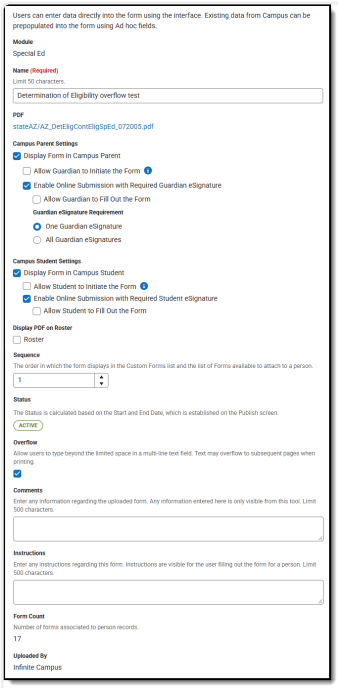
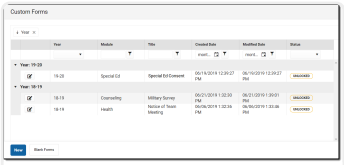
Amend

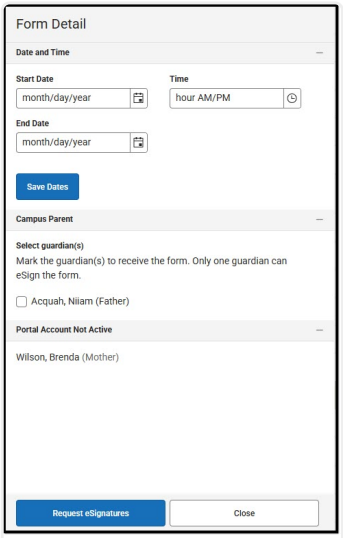
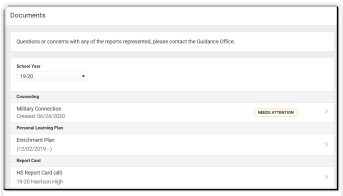
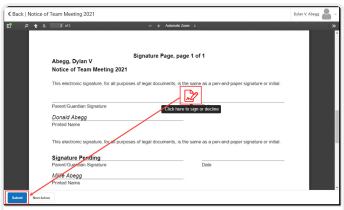
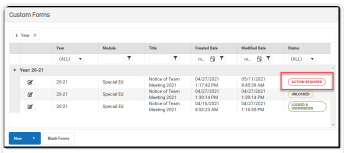
When amending a plan with eSignatures, the eSignature for the IEP Implementation editor clears out. Once the amendment process is complete, the plan must be returned to the parent/guardian for re-signature. The amendment process is the same for plans with and without eSignature functionality. See the Amend Special Ed Documents article for the full Amend process.

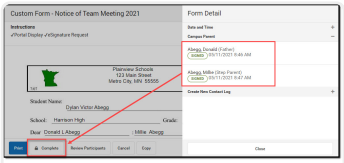
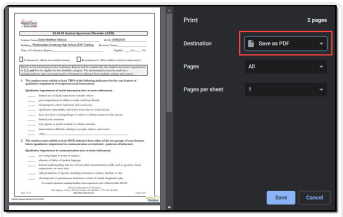
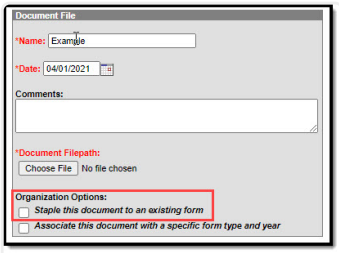
Custom Forms process

See the Custom Forms on Portal Process document for additional information.

Step	Description	Navigation	Image ***Click to Enlarge***

Step	Description	Navigation	Image *Click to Enlarge*
1. Create a Custom Form	Create a page to be sent to the Portal for eSignature.	Student Information > General Student Administration > Custom Form Setup	 *Custom Forms Setup*
2. Attach Custom Form to Student	Assign the eSignature Custom Form to the student.	Student Information > General > Forms > New	 *Forms tool*

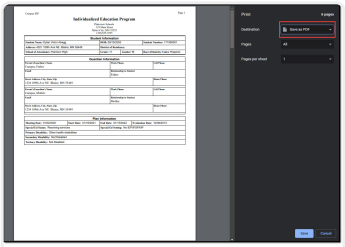
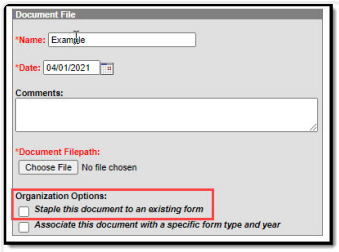
Step	Description	Navigation	Image *Click to Enlarge*
3. Send to Portal	Click the **Review Participants** button, then the **Request eSignatures** button.	Student Information > General > Forms > Review Participants > Request eSignatures	 *Request eSignatures*
4. Parent(s)/guardian(s) and/or Student Receives Document	The parent/guardian and student receives a notification when they have a Document that needs to be signed.	Campus Parent Portal and/or Campus Student Portal > Documents	 *Campus Parent/Student Portal Documents Need Attention*
5. Parent(s)/guardian(s) and/or Student Signs or Declines Custom Form	The parent(s)/guardian(s) sign or decline the document. Click the signature icon to sign or decline, then click **Submit**.	Campus Parent Portal and/or Campus Student Portal > Documents > Signature icon > Submit	 *Signature Icon and Submit*
6. Admin/teacher receives signed or declined form	Signed or declined form received.	Student Information > General > Forms	 *Signed or Declined Form Received*

Step	Description	Navigation	Image *Click to Enlarge*
7. Review Signatures and Complete	Review the signed or declined form and click **Complete**.	Student Information > General > Forms > Review Participants	 *Review Signature(s) and Complete Form*
8. Save Custom Form as PDF	Click the **Print** button, then save the form as a PDF.	Student Information > General > Forms > Print > Save as PDF	 *Save as PDF*
9. Upload PDF and Staple to Special Ed Document	Upload the PDF and Staple the document to the original Special Ed document.	Student Information > Special Ed > Special Ed Documents > Upload Document > Organization Options: Staple this document to an existing form	 *Upload and Staple Document*

Third-party process

Third-party eSignature applications, such as DocuSign, can be used as an alternative to Campus tooling, which allows users to add an electronic signature field directly to the Special Ed Document. This document provides a general overview of how to prepare a document for use in third-party software and completion in Campus.

Step	Description	Navigation	Image *Click to Enlarge*

Step	Description	Navigation	Image *Click to Enlarge*
1. Save Document as PDF	Click the Print button, then save the document as a PDF.	Student Information > Special Ed > Special Ed Documents > Print > Save as PDF	 *Save Special Ed Document as PDF*
2. Third Party eSign Process	Use the PDF to complete the eSignature Process using the third-party software.	N/A	N/A
3. Upload PDF and Staple to Special Ed Document	Upload the PDF and Staple the document to the original Special Ed document.	Student Information > Special Ed > Special Ed Documents > Upload Document > Organization Options: Staple this document to an existing form	 *Upload and Staple Document*