

# Special Ed eSignature Process

Last Modified on 02/07/2025 9:22 am CST

Tool Search: [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 Plan eSignature Editors](#)
- [Massachusetts Plan eSignature Editors](#)
- [Nebraska Plan eSignature Editors](#)
- [Nevada Plan eSignature Editors](#)
- [Pennsylvania Plan eSignature Editors](#)
- [South Dakota Plan eSignature Editors](#)

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

## Setup

### Tool Rights

Tool Search: [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 > 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 provides the same rights as marking the Read checkbox.

▼ Special Ed	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete
Special Ed Caseload	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Special Ed Contact Log	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Access to Records Created By Other Users	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Special Ed Documents	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete
Plan	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete
Document Sections	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Amend Plan	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Copy	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Lock	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Unlock	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Publish Draft to Portal	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete
Request eSignature on Portal	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete

*Request eSignature on Portal Tool Right*

## Set Portal Preferences

**Tool:** [Display Options](#)

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

### Portal Display Options

Display Options Template  
School: Harrison High Template: Harrison High

Expand All Collapse All

Documents ✓ Student ✓ Parent

Enable Documents Tool ☑ Student ☑ Parent  
 Note: If Documents is enabled, the Report Cards, Transcripts and configured Schedule reports display in the Documents tool if Available in Portal is selected in the Report Preferences.

Reports and Plans

Academic Progress	<span>☑ Student</span>	<span>☑ Parent</span>
Default Student Schedule	<span>☑ Student</span>	<span>☑ Parent</span>
Personal Learning Plan	<span>☑ Student</span>	<span>☑ Parent</span>
Program Participation	<span>☑ Student</span>	<span>☑ Parent</span>
Response to Intervention	<span>☑ Student</span>	<span>☑ Parent</span>
Special Education Plan	<span>☑ Student</span>	<span>☑ Parent</span>
Draft Special Education Plan	<span>☑ Student</span>	<span>☑ Parent</span>
Request eSignature Special Education Plan	<input type="checkbox"/> Student	<span>☑ Parent</span>
Special Education Other Documents	<span>☑ Student</span>	<span>☑ Parent</span>

Custom Modules

Save Manage Calendars Delete Close

*Request eSignature Special Education Plan Portal Display Option*

## Establish Relationships and Portal Accounts

Tool Search: [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 ☆  
 Abegg, Justin J (Jay) DOB: 01/01/09  
 \* Medical Condition(s) HS Graduation After School Care

Save New Non-Household Relationship Documents

Relationships within the \*\*Primary Household Relationships

Name	Gender	Relationship	Start Date	End Date	Emergency Priority	Guardian	Mailing	Portal	Messenger	Private
Abegg, Donald L	M	Father	06/09/2017		2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Abegg, Dylan V	M	Step-Sibling				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Abegg, Emma	F	Sibling				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Abegg, Millie	F	Mother	06/09/2017		1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Abegg, Robert V	M	Sibling	06/25/2012			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Abegg, Stella	F	Sibling	06/25/2012			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Abegg, Wallace D	M	Sibling	06/09/2017			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cardinal, Peggy M	F	Step-Sibling	06/25/2012			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Non-Household Relationships

Name	Gender	Relationship	Start Date	End Date	Emergency Priority	Guardian	Mailing	Portal	Messenger	Private
Abegg, Glissa-Jean	F	Aunt	06/25/2012		3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Relationships Tool Guardian and Portal Checkboxes

## Create and Enter Plan Information

Tool Search: [Special Ed Documents](#)

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

- [Delaware Plan eSignature Editors](#)
- [Massachusetts Plan eSignature Editors](#)
- [Nebraska Plan eSignature Editors](#)
- [Nevada Plan eSignature Editors](#)
- [Pennsylvania Plan eSignature Editors](#)
- [South Dakota Plan eSignature Editors](#)

## Request eSignature

Tool Search: [Special Ed Documents](#)

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

**Special Ed Documents**  
Ashley, Lesley A

Open Lock/Unlock Copy Amend Delete Print New Document

Upload Document Publish/Remove Draft **Request/Remove eSignature**

**Documents List**

- 2023-2024 (6)
  - Plans (4)
    - DE Private School Plan (05/13/2024-05/13/2025)
    - DE Elementary IEP (05/06/2024-05/05/2025)
    - DE Secondary IEP (05/06/2024-05/05/2025)
    - DE Pre-School IEP (05/06/2024-05/05/2025)
  - Meeting Invitations (2)
    - DE Meeting Invitation (06/10/2024)
    - DE Meeting Invitation (04/15/2024)

**Document Detail**  
Portal: Unpublished  
Locked: No Type: AR\_RED  
Date: 05/06/2024 - 05/05/2025  
Created Date: 05/23/2024 09:46:25 Created By: Administrator, System  
Last Modified Date: 06/06/2024 10:16:54 Modified By: Administrator, System

*Request eSignature on Portal Button*

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

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

Requesting eSignatures will make the document read-only. Select one from the list of guardians with active Portal accounts to eSign the plan.

**Select Guardian(s)**


Niiam Acquah

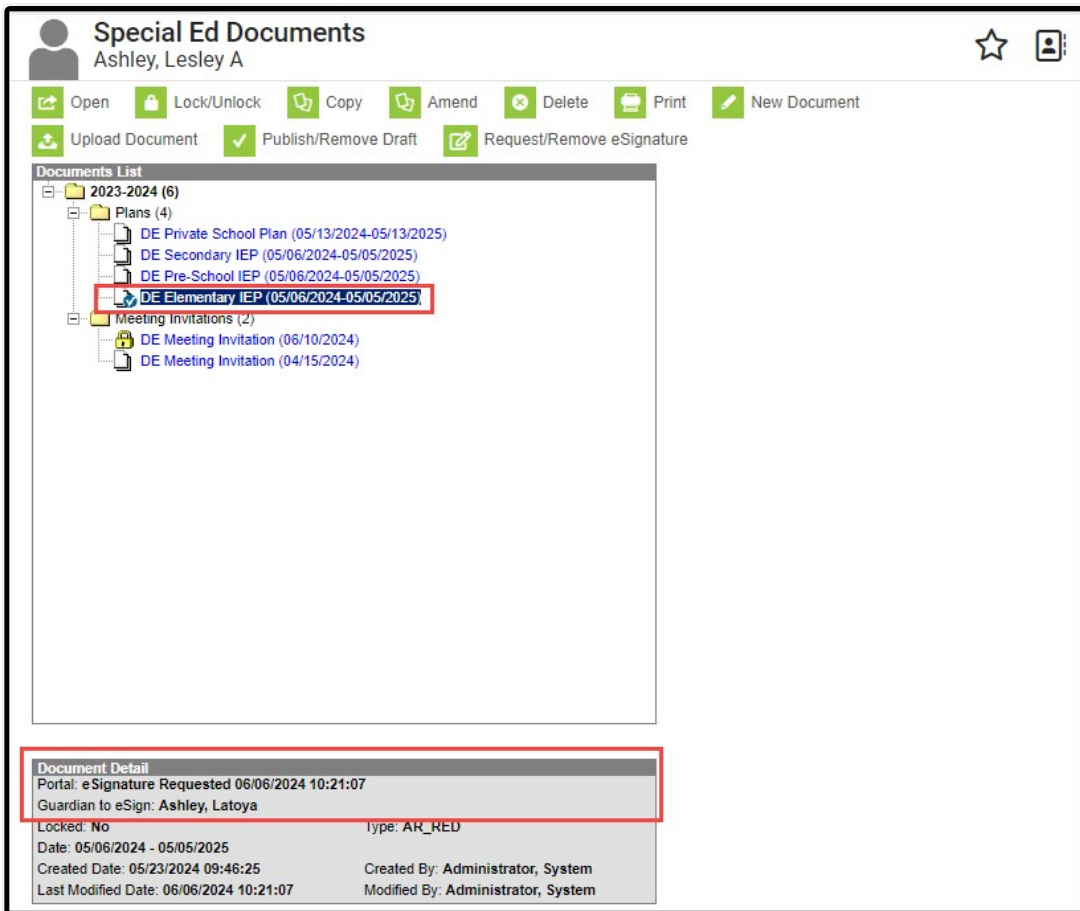
**Guardian(s) - Parent portal account not active**

Brenda Wilson

Ok Cancel

*Request eSignature Dialog*

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

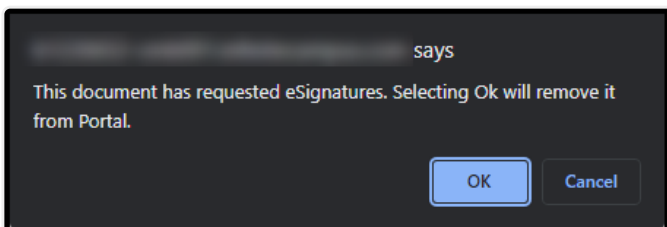


Checkmark Icon and Document Detail eSignature Information

## 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 plan before the guardian has a chance to sign. A warning displays confirming the removal of the plan from Portal. Click **Ok** to confirm or **Cancel** to go back.

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

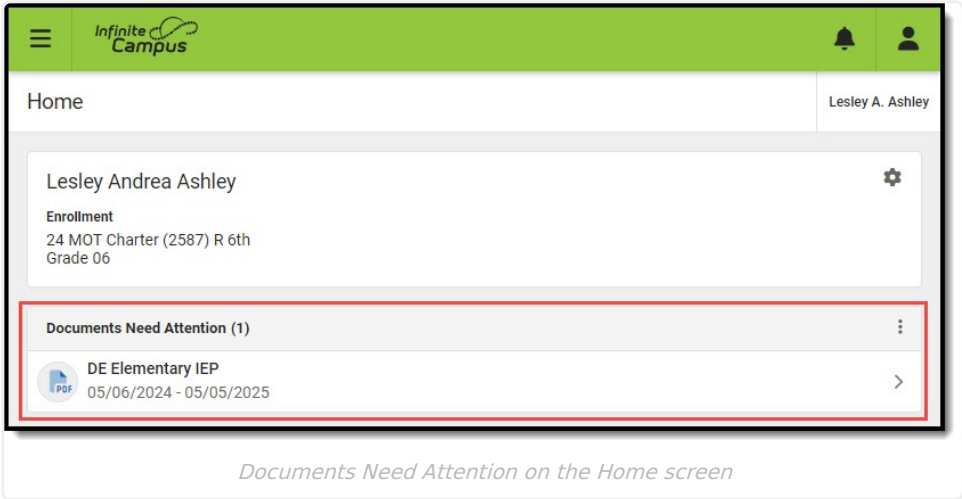


Remove eSignatures Warning

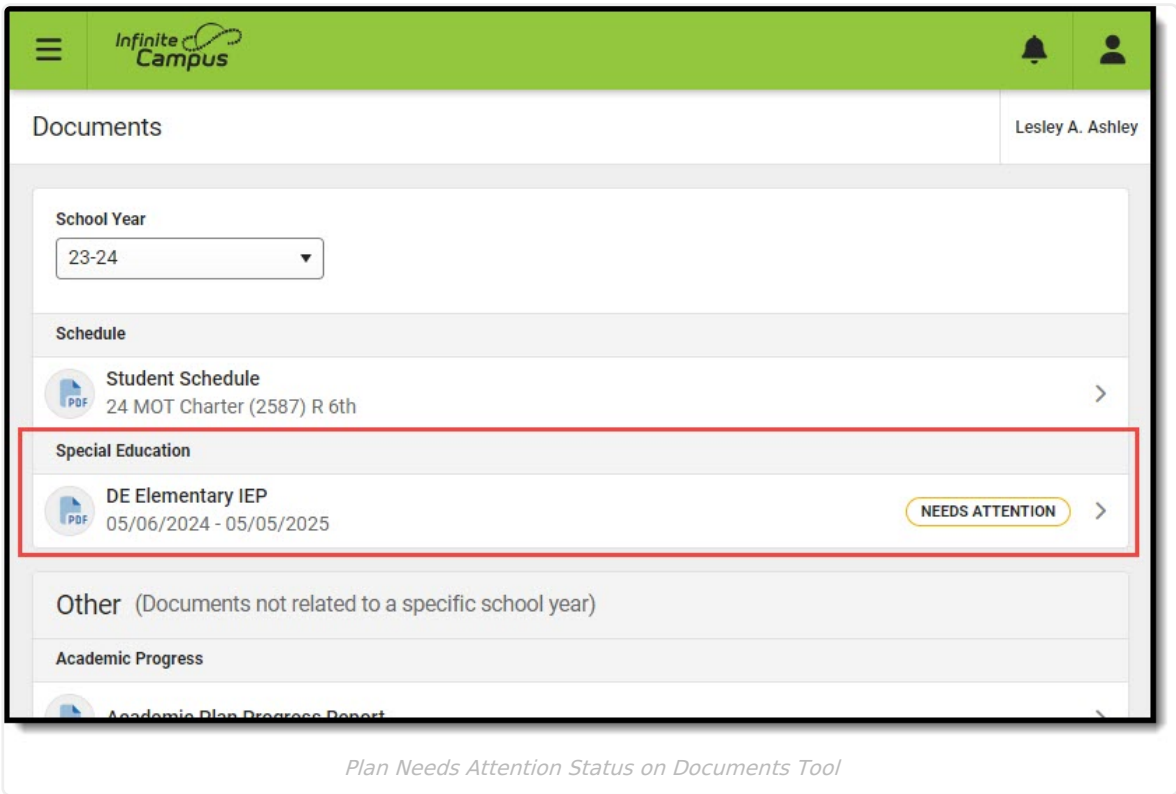
## Guardian Review

Tool Search: [Campus Parent Portal](#), [Campus Student Portal](#) (read-only)

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

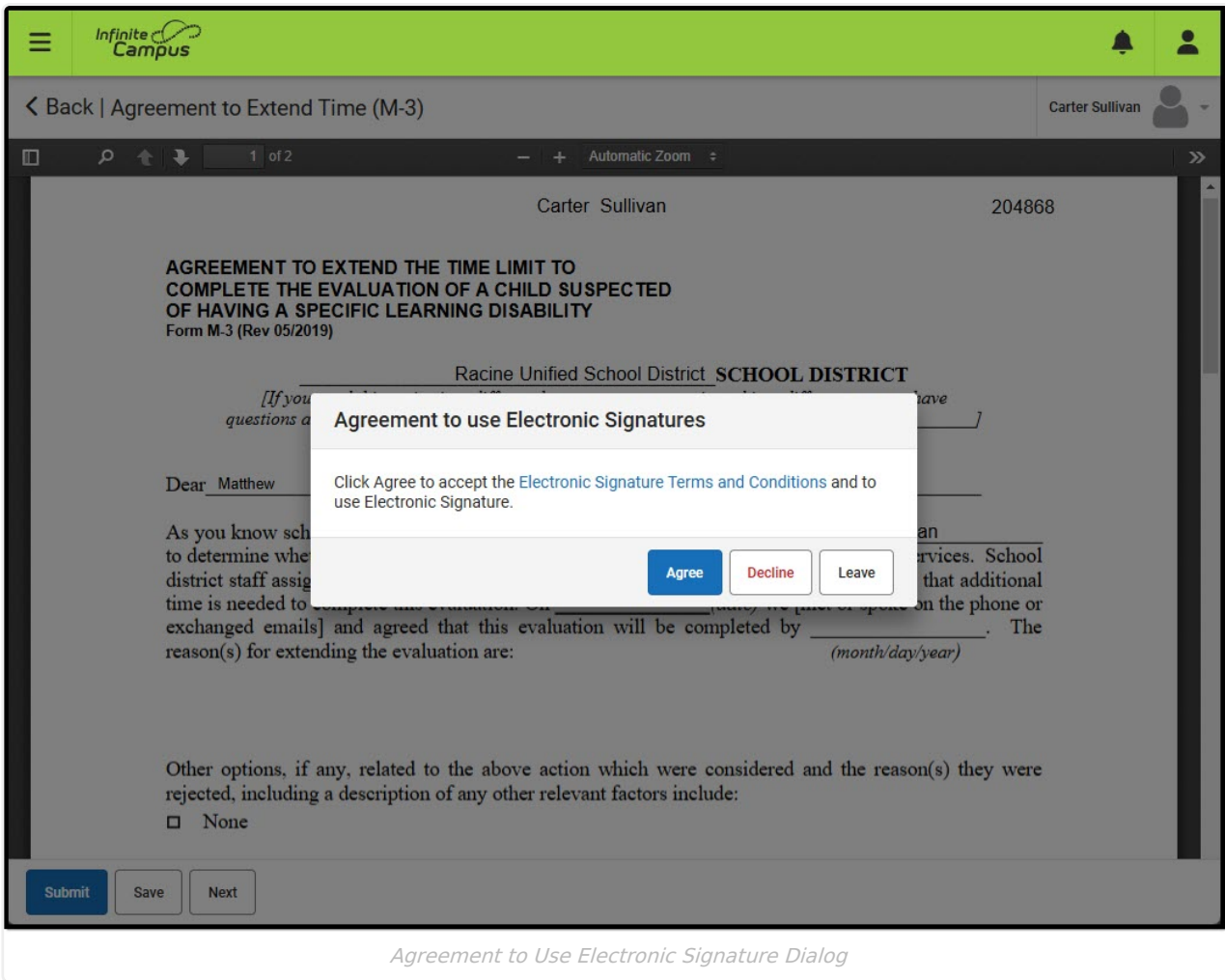


A status of **Needs Attention** displays next to the plan's name on the Documents tool.



## Terms and Conditions

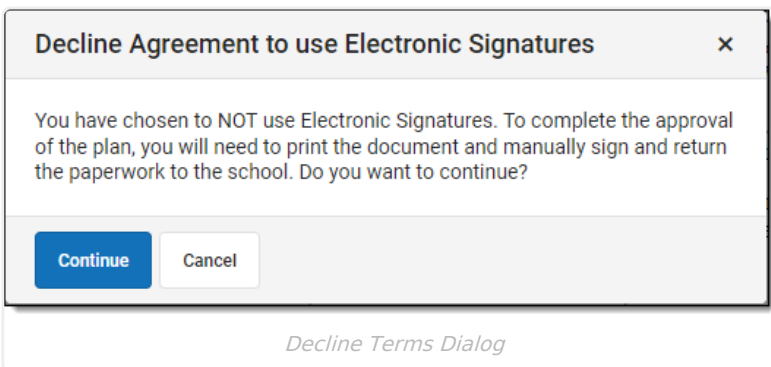
Upon opening the document, the **Terms and Conditions** dialog displays, explaining that the guardian must accept the Terms and Conditions for Electronic Signature before saving and submitting the plan. A link in the dialog brings the user to a PDF detailing the terms.



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.



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



Special Education

DE Elementary IEP

05/06/2024 - 05/05/2025

DECLINED TERMS & CONDITIONS & PENDING >

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.

< Back | DE Elementary IEP 05/06/2024 - 05/05/2025
Lesley A. Ashley

SIGNATURES

Yes     No

Yes     No

Yes     No

Yes     N/A

**I acknowledge that I have received a copy of the Procedural Safeguards. My due process rights under these Procedural Safeguards have been explained to me**

**I agree with the program described in this document**

**I agree with the placement decision as noted above and discussed at this meeting**

**At least one year before the age of majority (18), the student has been informed that rights will transfer to him/her unless a legal guardian has been appointed**

\_\_\_\_\_

Parent/Student Signature

\_\_\_\_\_

Date

\_\_\_\_\_

Parent/Student Signature

\_\_\_\_\_

Date

**Method of Contact**

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INFORMATION RELEASE CONSENT FORM FOR SPECIAL EDUCATION AND RELATED SERVICES  
SUPPORT ACCESS TO PUBLIC BENEFITS/INSURANCE

STUDENT NAME: Lesley Ashley	STUDENT DATE OF BIRTH: 11/08/2011
SCHOOL DISTRICT/CHARTER SCHOOL: MOT Charter School	

I hereby authorize this school       MOT Charter       to release this student's records and information to

Submit

Save

Next

Blank eSignature Example

Mark all desired checkboxes in red and 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.

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YES, I give the school permission to share this student's education and health-related information with Medicaid, including billing information.

NO, I do not give the school permission to share this student's education and health-related information with Medicaid

Signed by (check only one):  Student (if over 18 years of age)  Parent  Guardian  Custodian

Signature: Latoya Ashley

Print Name: \_\_\_\_\_ Date: \_\_\_\_\_

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**PRIOR WRITTEN NOTICE**

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*Completed eSignature Example*

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

**Special Education**

**DE Elementary IEP**

05/06/2024 - 05/05/2025

SIGNED & PENDING


>

*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 plan. A Draft watermark displays indicating the plan has not yet been completed.

plan.fop
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**INDIVIDUALIZED EDUCATION PROGRAM (IEP)**  
Elementary IEP  
State of Delaware

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STUDENT INFORMATION

Student Name: Lesley Andrea Ashley Student ID#: 243129  
 DOB: 11/08/2011 Current Grade: 06  
 Address: 250 Edgar Rd, Townsend, DE 19734  
 District of Residence: \_\_\_\_\_  
 Attending Building: MOT Charter  
 Disability Classification: 1000: Autism

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IEP STATUS

Meeting Date: 06/10/2024 Most Recent ESR Date: \_\_\_\_\_  
 IEP Initiation Date: 05/06/2024 IEP End Date: 05/05/2025

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PARENT/GUARDIAN INFORMATION


Parent/Guardian 1: Latoya Ashley  
 Address: 250 Edgar Rd, Townsend, DE 19734  
 Home Phone: (999)555-3178 Email Address: \_\_\_\_\_

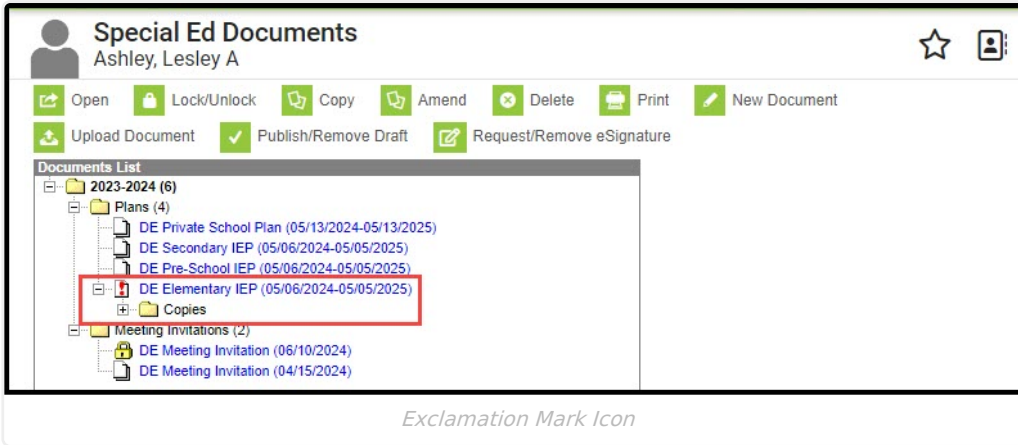
Parent/Guardian 2: Regi Ashley  
 Address: 250 Edgar Rd, Townsend, DE 19734  
 Home Phone: (999)555-3178 Email Address: \_\_\_\_\_

Non-Signing Guardian View

## Complete

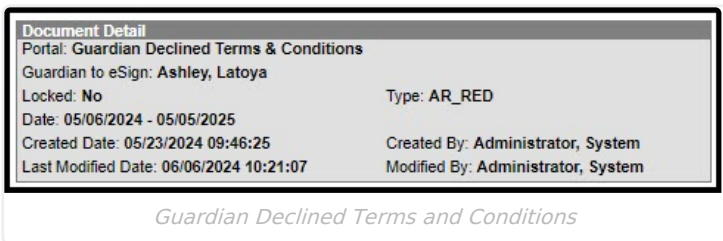
Tool Search: [Special Ed Documents](#)

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 plan's name indicating action is needed.



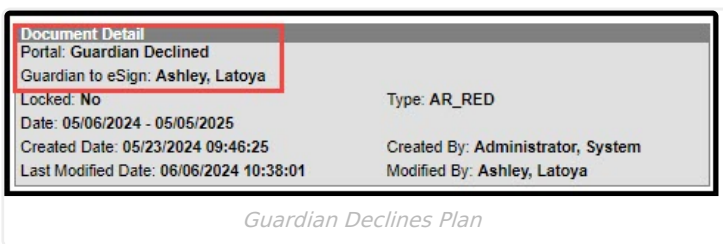
## Guardian Declined Terms

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 Plan

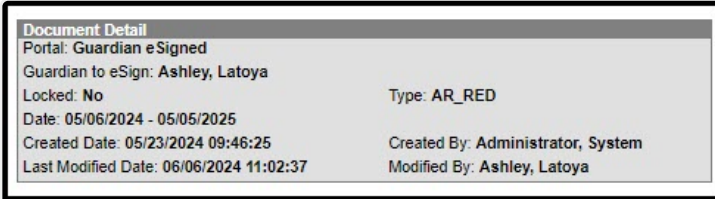
When the guardian accepts the Terms and Conditions but disagrees with the plan's contents, the Document Detail indicates the plan was declined, and a PDF copy of the signed plan displays in the Copies folder.



## Guardian Agreed Terms and Plan

When a guardian accepts the Terms and Conditions, agrees to the plan'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 plan at this stage invalidate the signatures. When changes need to be made to the plan, an additional eSignature Request must be sent back to the guardian.



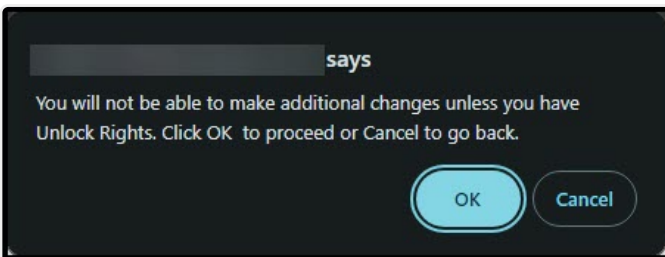
Document Detail Information

## Lock

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

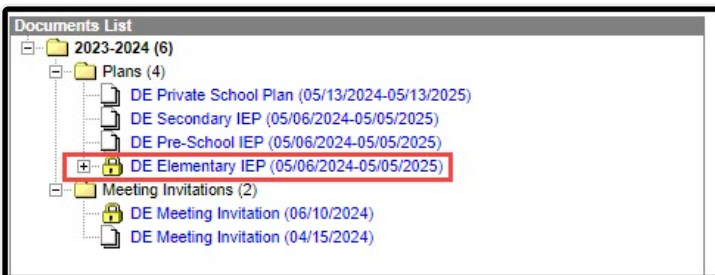
Additional lock logic may apply when the plan is not filled out completely.

Click **Lock** to complete the plan process. A warning displays indicating users are not able to make any changes unless they have additional Unlock Tool Rights.



Lock Warning Message

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

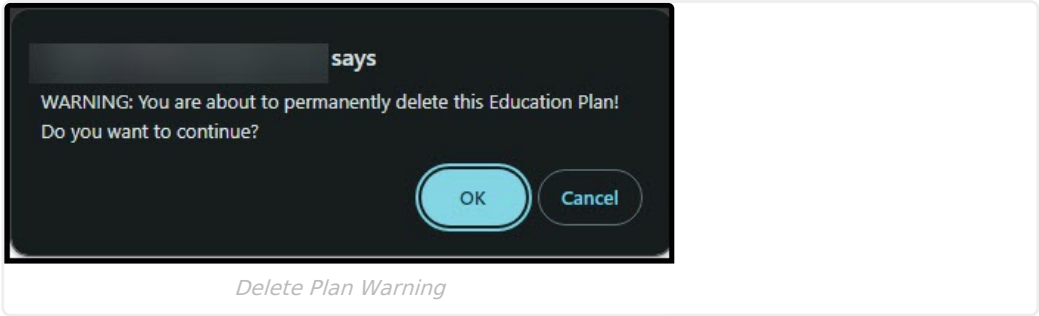


Locked Plan

## Delete

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

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



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

## Amend

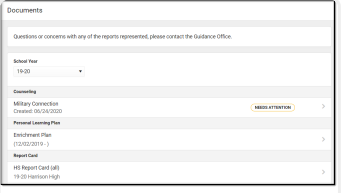
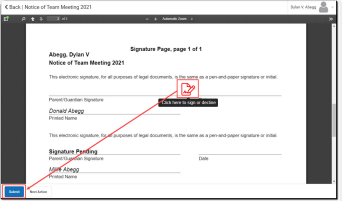
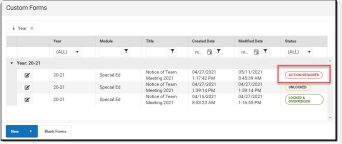
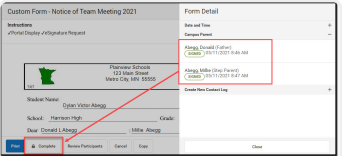
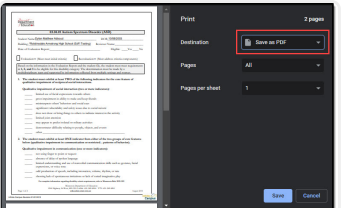
When amending a plan with eSignatures, the eSignature for the IEP Implementation editor clears out. When the amendment process has been completed, the plan must be sent back to the parent/guardian to sign again. The amendment process is the same for plans with and without eSignature functionality. See 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 <i>Click to Enlarge</i>
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Step	Description	Navigation	Image <i>Click to Enlarge</i>
<p><b>1. Create a Custom Form</b></p>	<p>Create a page to be sent to the Portal for eSignature.</p>	<p>Student Information &gt; General Student Administration &gt; Custom Form Setup</p>	<p><i>Custom Forms Setup</i></p>
<p><b>2. Attach Custom Form to Student</b></p>	<p>Assign the eSignature Custom Form to the student.</p>	<p>Student Information &gt; General &gt; Forms &gt; New</p>	<p><i>Forms tool</i></p>
<p><b>3. Send to Portal</b></p>	<p>Click the <b>Review Participants</b> button, then the <b>Request eSignatures</b> button.</p>	<p>Student Information &gt; General &gt; Forms &gt; Review Participants &gt; Request eSignatures</p>	<p><i>Request eSignatures</i></p>

Step	Description	Navigation	Image <i>Click to Enlarge</i>
<p><b>4. Parent(s)/guardian(s) and/or Student Receives Document</b></p>	<p>The parent/guardian and student receives a notification when they have a Document that needs to be signed.</p>	<p>Campus Parent Portal and/or Campus Student Portal &gt; Documents</p>	 <p><i>Campus Parent/Student Portal Documents Need Attention</i></p>
<p><b>5. Parent(s)/guardian(s) and/or Student Signs or Declines Custom Form</b></p>	<p>The parent(s)/guardian(s) sign or decline the document. Click the signature icon to sign or decline, then click <b>Submit</b>.</p>	<p>Campus Parent Portal and/or Campus Student Portal &gt; Documents &gt; Signature icon &gt; Submit</p>	 <p><i>Signature Icon and Submit</i></p>
<p><b>6. Admin/teacher receives signed or declined form</b></p>	<p>Signed or declined form received.</p>	<p>Student Information &gt; General &gt; Forms</p>	 <p><i>Signed or Declined Form Received</i></p>
<p><b>7. Review Signatures and Complete</b></p>	<p>Review the signed or declined form and click <b>Complete</b>.</p>	<p>Student Information &gt; General &gt; Forms &gt; Review Participants</p>	 <p><i>Review Signature(s) and Complete Form</i></p>
<p><b>8. Save Custom Form as PDF</b></p>	<p>Click the <b>Print</b> button, then save the form as a PDF.</p>	<p>Student Information &gt; General &gt; Forms &gt; Print &gt; Save as PDF</p>	 <p><i>Save as PDF</i></p>

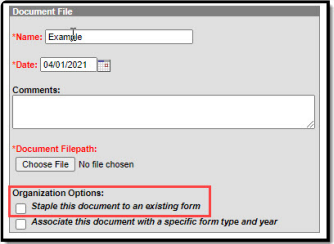


Step	Description	Navigation	Image <i>Click to Enlarge</i>
<b>9. Upload PDF and Staple to Special Ed Document</b>	Upload the PDF and Staple the document to the original Special Ed document.	Student Information > Special Ed > <a href="#">Special Ed Documents</a> > Upload Document > Organization Options: Staple this document to an existing form	<p><i>Upload and Staple Document</i></p>

## 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 <i>Click to Enlarge</i>
<b>1. Save Document as PDF</b>	Click the Print button, then save the document as a PDF.	Student Information > Special Ed > <a href="#">Special Ed Documents</a> > Print > Save as PDF	<p><i>Save Special Ed Document as PDF</i></p>
<b>2. Third Party eSign Process</b>	Use the PDF to complete the eSignature Process using the third-party software.	N/A	N/A

Step	Description	Navigation	Image <i>Click to Enlarge</i>
<p><b>3. Upload PDF and Staple to Special Ed Document</b></p>	<p>Upload the PDF and Staple the document to the original Special Ed document.</p>	<p>Student Information &gt; Special Ed &gt; <a href="#">Special Ed Documents</a> &gt; Upload Document &gt; Organization Options: Staple this document to an existing form</p>	 <p><i>Upload and Staple Document</i></p>