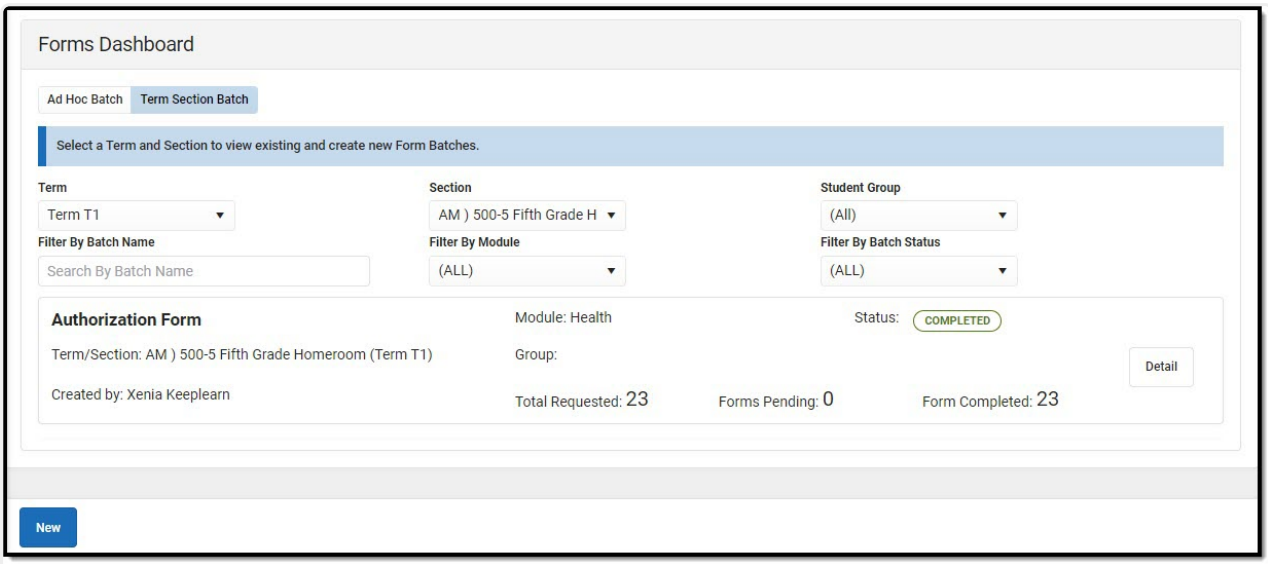
Form Batch Setup

Last Modified on 09/18/2026 10:17 am CDT

Path: Student Information > General Student Administration > Form Batch Setup

The Form Batch Setup tool is used to assign a custom form to a group of students. Toggle between the Ad hoc Batch and Term Section Batch buttons to create new and view existing batches. Select an existing batch to navigate to the step the user left off on.

Form Batches are school and calendar-specific.



The Term Section Form Batch view of the Form Batch Setup tool.

See the Form Batch Setup Tool Rights article for information on the rights required to use this tool.

The **Filter By Batch Name**, **Filter By Module**, **Filter By Batch Status** fields can be used to quickly narrow the results and find particular batches quickly.

Ad Hoc Batch: only batches created by the user can be viewed.

Term Section Batch: users must be associated with the term section to run the Term Section Batch.

Field/Column Name	Description
Term **Term Section Batch Only*	The type of school structure associated with the selected calendar.
Section **Term Section Batch Only*	The individual course offering.
Student Group **Term Section Batch Only*	Any applicable learning groups within the section. See the Student Groups documentation for additional information.
Module	The module in which the form is organized.
Batch Name	The name of the batch group.
Form Type	This indicates whether the form is Portal, Portal Fillable, Portal eSignature, Interactive with Database Table, or Interactive.
Status	The state of the batch. Statuses include: • Draft: batch forms haven't been generated yet. • Forms Generated: forms have been generated without error. • Action Required: some or all forms need some attention. • Published: all forms are on the Portal. • Completed: all forms are locked/completed.
Total Requested	The current number of students selected.
Forms Pending	The number of forms that require attention.
Forms Complete	The number of completed forms.

Create new batch

A Form Batch can be created for students in a Term Section or an Ad hoc filter. Users assigned to a course/section and having rostered students can create Form Batches using the Term Section option. Users can also create Form Batches using any Ad Hoc filters and other filters with the Ad Hoc Batch option.

> The process for creating a Form Batch is the same for both options **except** the Add Students step, noted below.

Select the Form Batch option, Ad hoc or Term Section, then click **New** to create a new batch. The Select Form screen displays.

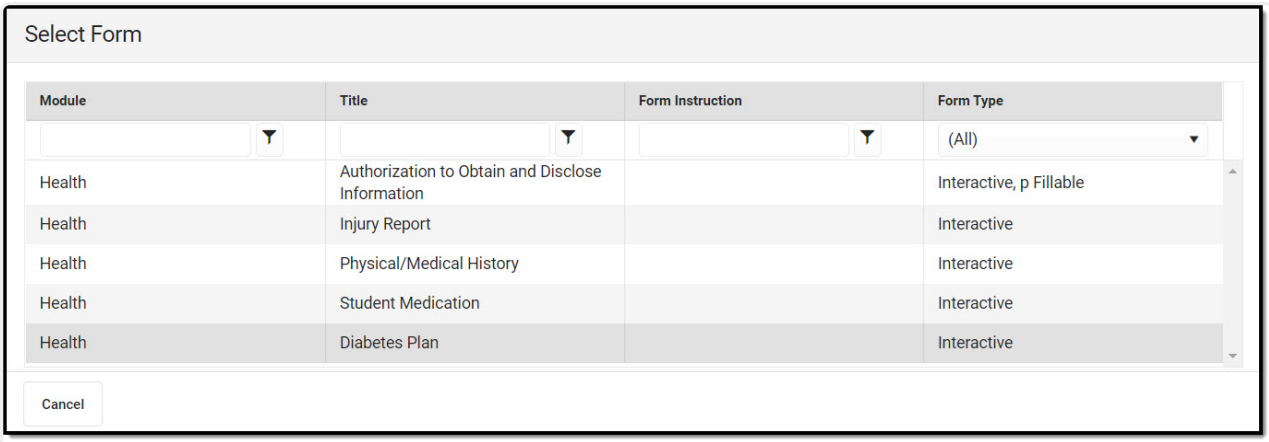
Select Form

The **Select Form** screen displays all active forms available. All forms assigned to a student via the Form Batch tool display on the Forms tool, but not on the module's Documents tool.

This article uses an interactive form that will be sent to the Campus Parent and Campus Student Portal to be filled out and for an eSignature as an example. See the Custom Forms tool for information on how to set up each of the Form types. Other options for forms that can be created using the Form Batch tool include:

Form Type	Description
Interactive	• Displays on Forms tool • Teacher/user can fill out the form
Interactive, Portal	• Displays on Forms tool • Teacher/user can fill out the form • Read-only on Portal
Interactive, eSign	• Displays on Forms tool • Teacher/user can fill out the form • Parent/guardian and/or student can sign the form via the Portal
Interactive, p Fillable	• Displays on Forms tool • Teacher/user can fill out the form • Parent/guardian and/or student can sign the form via the Portal • Parent/guardian and/or student can fill out the form
Interactive with DB Table	• Creates a database table where data can be queried and reported in Ad hoc • Displays on Forms tool • Teacher/user can fill out the form
Interactive with DB Table, Portal	• Creates a database table where data can be queried and reported in Ad hoc • Displays on Forms tool • Teacher/user can fill out the form • Read-only on Portal

Form Type	Description
Interactive with DB Table, eSign	• Creates a database table where data can be queried and reported in Ad hoc • Displays on Forms tool • Teacher/user can fill out the form • Parent/guardian and/or student can sign the form via the Portal
Interactive with DB Table, p Fillable	• Creates a database table where data can be queried and reported in Ad hoc • Displays on Forms tool • Teacher/user can fill out the form • Parent/guardian and/or student can sign the form via the Portal • Parent/guardian and/or student can fill out the form



Select Form Screen

Choose a form to associate with the student(s). The **Prepare Form** screen displays.

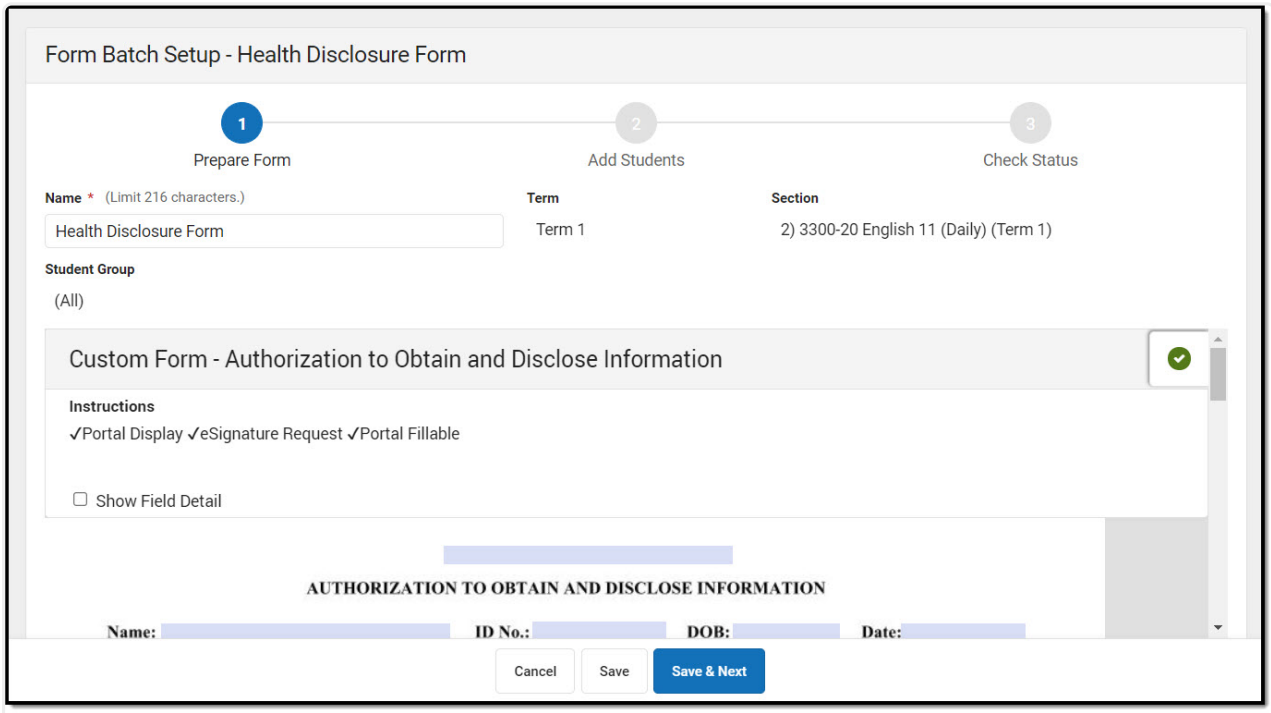
Prepare Form

The **Prepare Form** screen is used to set up the form for the student(s). Enter a **Name** for the batch and any information into the fillable fields. Any data entered into the form on the Prepare Form screen applies to ALL student forms.

> The **Term**, **Section**, and **Student Group** fields are read-only on this screen.

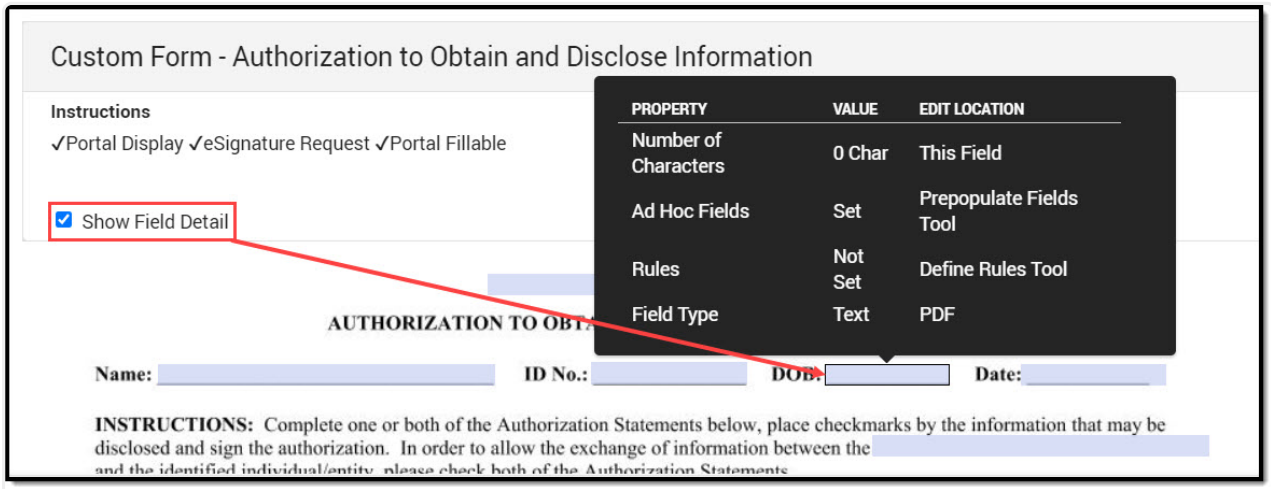
The **Custom Form Name** and the **Instructions** display at the top of the form. The header also indicates if the form will display on Roster and/or Portal or be sent to the parent/guardian and/or

student for eSignature and data entry.



Prepare Form

The **Show Field Detail** field can be marked to allow the user to view additional information about each field upon hover.



Show Field Detail Hover Information

Enter data into the form for all students. Click **Save** to save progress and remain on the screen, or **Save & Next** to save and proceed to the next step. The Add Students screen displays.

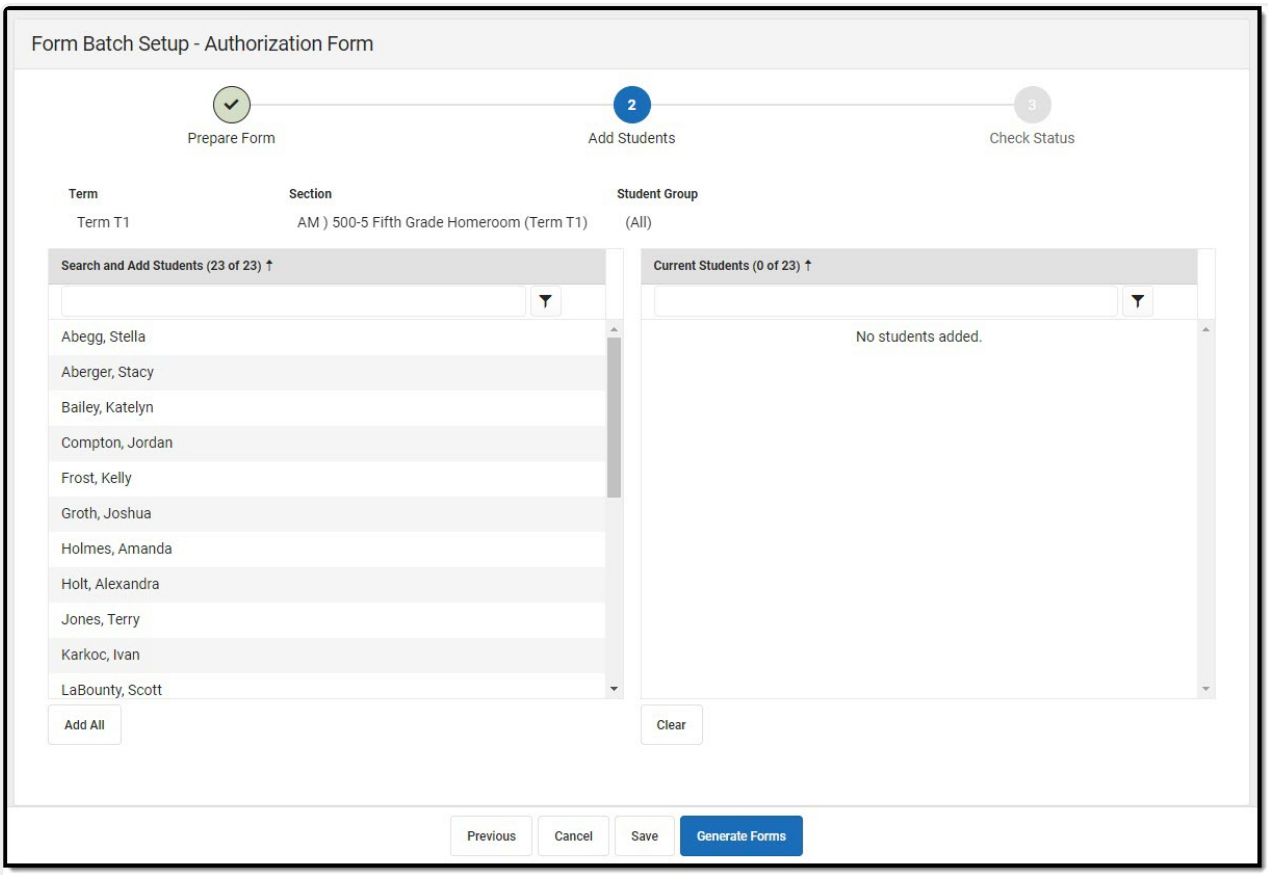
Term Section Add Students

See the Ad Hoc Add Students section for batches created using the Ad hoc Batch option.

The **Add Students** screen is used to select which students will have the form associated to them.

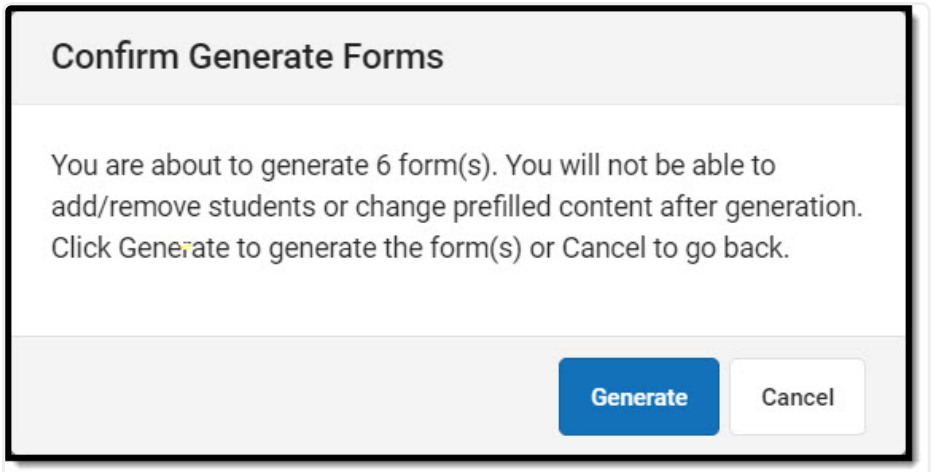
The **Search and Add Students** section displays all students from the Term, Section, and Student Group selected . Click **Add All** to put all students into the batch. Selecting an individual student's name adds that student to the Current Students list and vice versa. Individual students can also be selected to add or remove students to and from the different columns.

The **Current Students** section displays the names of the students who will be included in the batch. Click **Clear** to remove all students from the list.



Add Students (Term Section Batch)

Once the desired students are selected, click **Save** to save progress and remain on the screen, or **Generate Forms** to save and proceed to the next step. A pop-up displays explaining the number of forms that will be generated and warning the user that once the forms are generated, students cannot be added/removed from the batch and prefilled content cannot be modified. It will also display on the Forms tool as soon as the form is generated.



Confirm Generate Forms Warning

Click **Generate** to create the batch forms, or **Cancel** to go back. The Check Status Screen Displays.

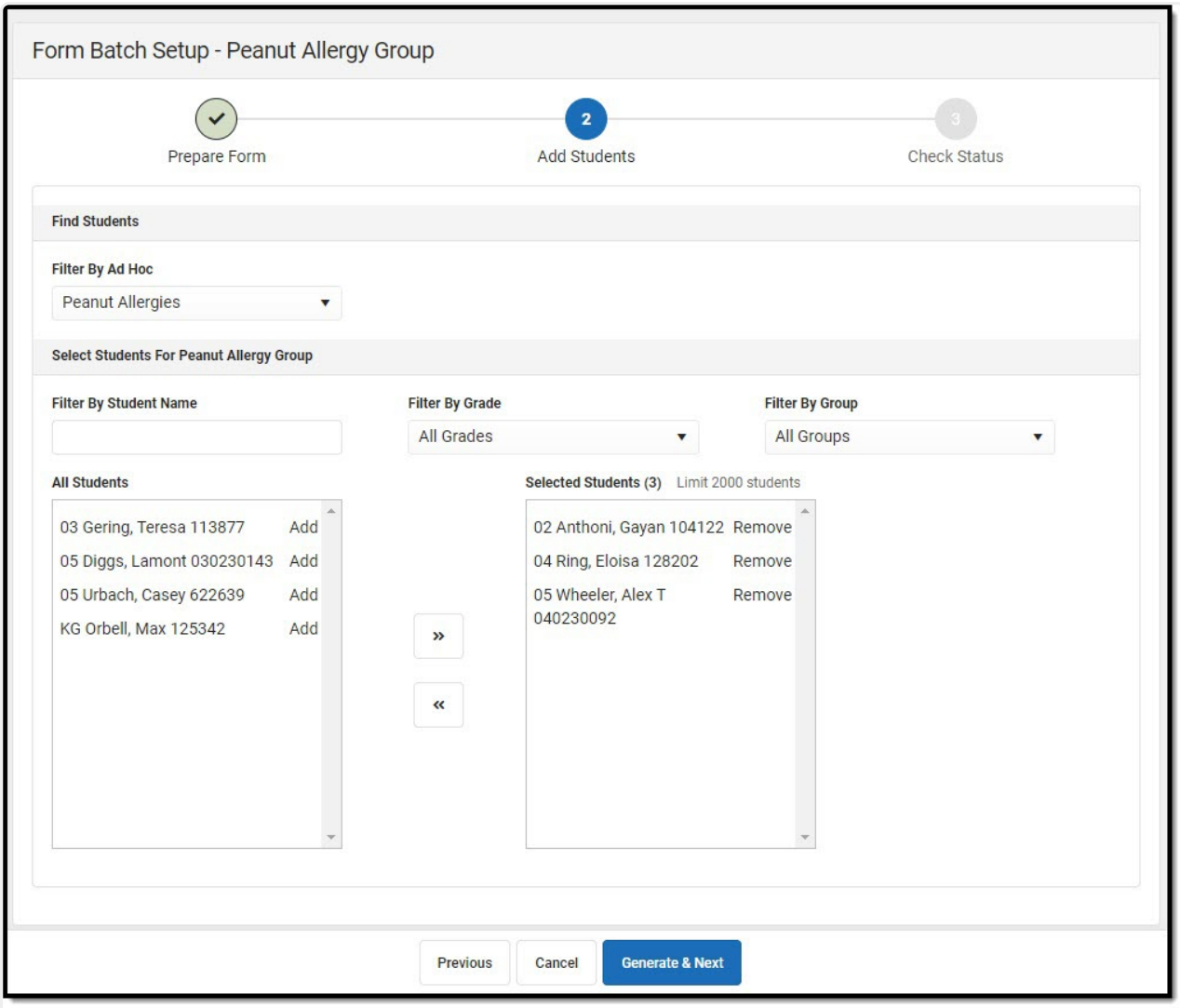
Ad hoc Add Students

> See the Term Section Add Students section for batches created using a Term Section.

The **Add Students** screen is used to select which students will have the form associated to them.

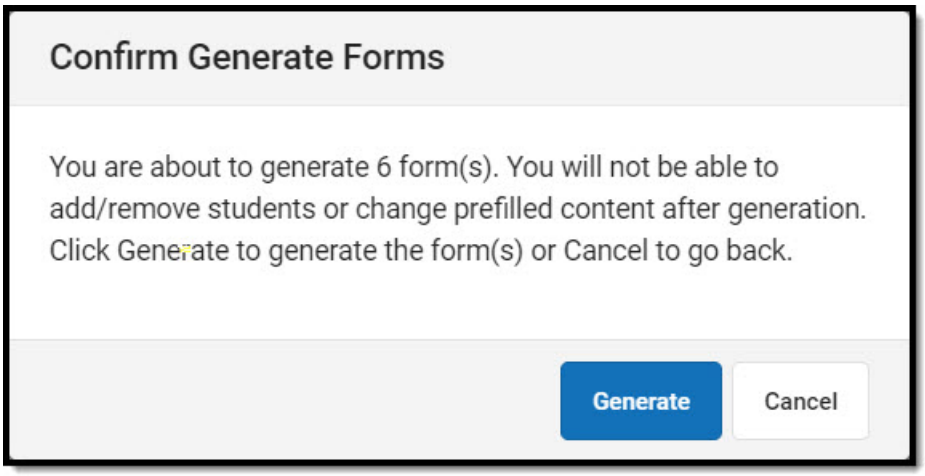
The **Find Students** section can be used to select an Ad hoc filter to find a group of students. Selecting an individual student's name adds that student to the Selected Students list and vice versa. Individual students can also be selected to add or remove students to and from the different columns. Users can also filter by student name, grade, or student group to find students. See the Student Group documentation for additional information.

The **Selected Students** section displays the names of the students that will be included in the batch. Click **Clear** to remove all students from the list.



Add Students (Ad hoc Batch)

Once the desired students are selected, click **Generate & Next** to proceed to the next step. A pop-up displays explaining the number of forms that will be generated and warning the user that once the forms are generated, students cannot be added/removed from the batch and prefilled content cannot be modified. It will also display on the Forms tool as soon as the form is generated.



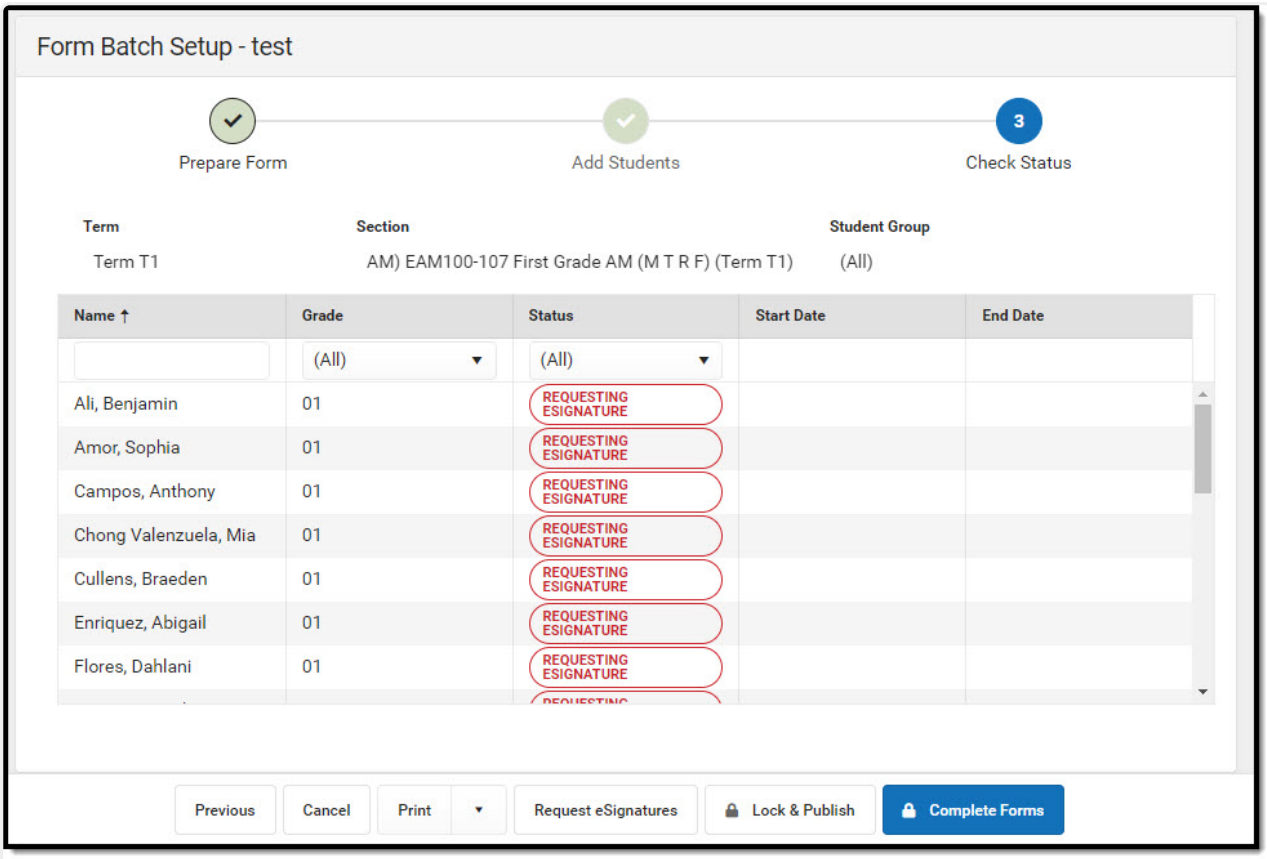
Click **Generate** to create the batch forms, or **Cancel** to go back. The Check Status Screen Displays.

Check Status

The **Check Status** screen is used to view the status and edit the forms. All functions that can be performed on the Forms tool can also be performed on this screen, with additional batch functions that can be done for all forms. These include setting a Start Date/Time and End Date, Requesting eSignature, Locking, and Completing forms. Individual forms can be edited independently from the batch, including setting different Start and End Dates.

Select a form to modify an individual form.

If the student's Enrollment has been deleted after a Form has been generated, "No grade found" displays in the Grade column. For eSignature Forms, an End Date may be entered to allow the Form on the Portal to expire.



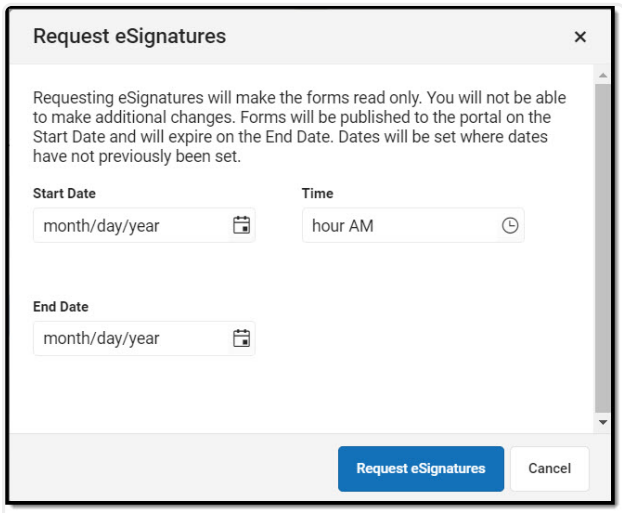
Check Status

Column Name	Description
Name	The student's name.
Grade	The student's grade.
Status	The state of the form. Statuses include: **Non-eSignature Documents Statuses** • Draft: The form contains errors that must be corrected before completion. • Locked: The forms is complete and locked. No further edits can be made. • Unlocked: The form does not contain any errors. • Locked and Published: The form is complete and is available for parent/guardian(s) and/or students to view on the Campus Parent and/or Student Portal. No further edits can be made. **eSignature Documents Statuses** • Draft: The form contains errors that must be corrected before completion. • Requesting eSignature: All errors have been corrected and the form is ready to be sent to the parent/guardian(s) and/or student for eSignature. • Pending eSign: The number of days the signature request was sent and is awaiting eSignature. • Pending Publish: The number of days until the form will be sent to the portal. • Expired: The End Date of the form has passed. • Action Required: Indicates all signatures are collected and the form is ready to be completed. • Locked and Signed: The form is complete and all participants have signed the document. No further edits can be made. • Locked and Declined: The form is complete and a participant has declined the document. No further edits can be made. • Locked and Overridden: The form is complete and the user has overridden at least one signature. No further edits can be made. • No Participants: There are no valid Portal accounts. • Unlocked: The user has confirmed there are no participants. The form will be read-only on the Portal. **Note**: If the form has no participants, the user can contact their administrator regarding updating Census information OR they can confirm that there aren't any participants by selecting the individual form and Review Participants > Confirm No Participants. The form will still display on the Forms tool.
Start Date	The date the form will be sent to the Portal in the future. This is optional.
End Date	The date after which the form becomes read-only on the Portal. This is optional.

Once all data entry is complete, click the **Request eSignature** button. A pop-up displays. Entering a Start Date/Time and End Date sets that value for all forms that do not have any values

entered already. Additional changes cannot be made after the eSignature request has been sent. The form will display on the Portal as of the Start Date.

When the **One Guardian eSignature Required to Complete** option is marked on the Custom Forms Setup tool, all guardians associated with the student receive the form, but only one signature is required. The first guardian to sign the form prevents the other guardian(s) from signing.



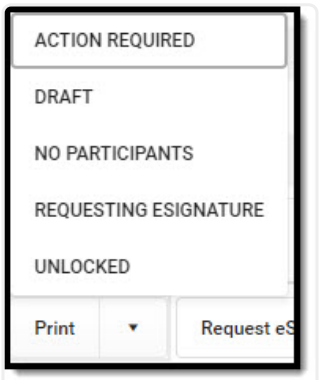
Confirm Batch eSignature Request(s)

Additional buttons can display at the bottom of the Check Status screen, depending on the forms' status. For example, when one form has been signed by all participants, the **Complete** button displays. When clicked, only forms with all signatures gathered will be completed. The rest of the forms remain in their existing statuses.

Print batch forms

Individual student forms can be printed on the **Check Status** screen by opening an individual document. Forms can also be printed as a batch by clicking the **Print** button. The down arrow on the Print button provides users with options to print a batch of forms with a particular status:

- Action Required
- Draft
- No Participants
- Requesting eSignature
- Unlocked



Batch Print Options

Complete batch forms

Once the batch is generated, the forms can be completed individually and as a batch the same way they can be completed on the Forms tool. See the Complete Forms section on the Forms tool document for additional information.

Click **Complete Forms** to complete all applicable eSignature forms. Click the **Lock & Publish** button to complete Unlocked forms.

> **Note**: The Complete Forms button display any time there are forms that can be Completed.

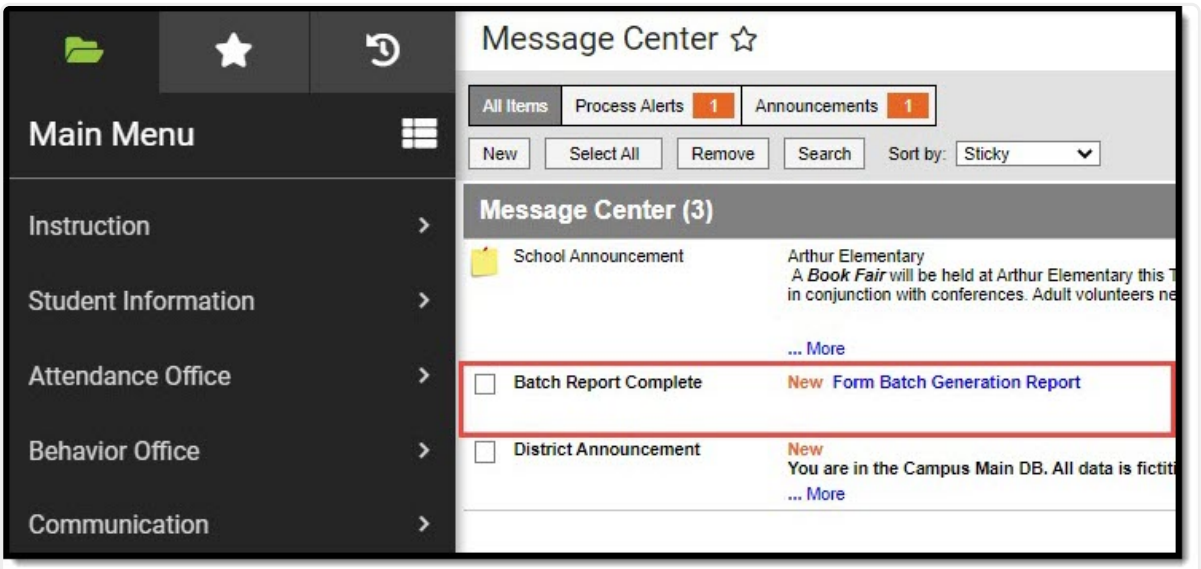
Delete batches

Batches for eSignature forms can be deleted from the **Prepare Form** screen. Once a form has been sent to the Portal, the batch cannot be deleted. Portal-only and non-Portal forms can be deleted at any time.

Large form batches

Form Batches with 50 or more students (maximum 2000 students) AND batch printing jobs with 50 or more forms are automatically sent to the Batch Queue. Navigate to the Message Center to view and/or print the Form Batch.

Note: By default, Batch Queue reports are deleted after 30 days unless otherwise specified in System Preferences (System Administration > Preferences > System Preferences > Batch Queue Expiration Days).



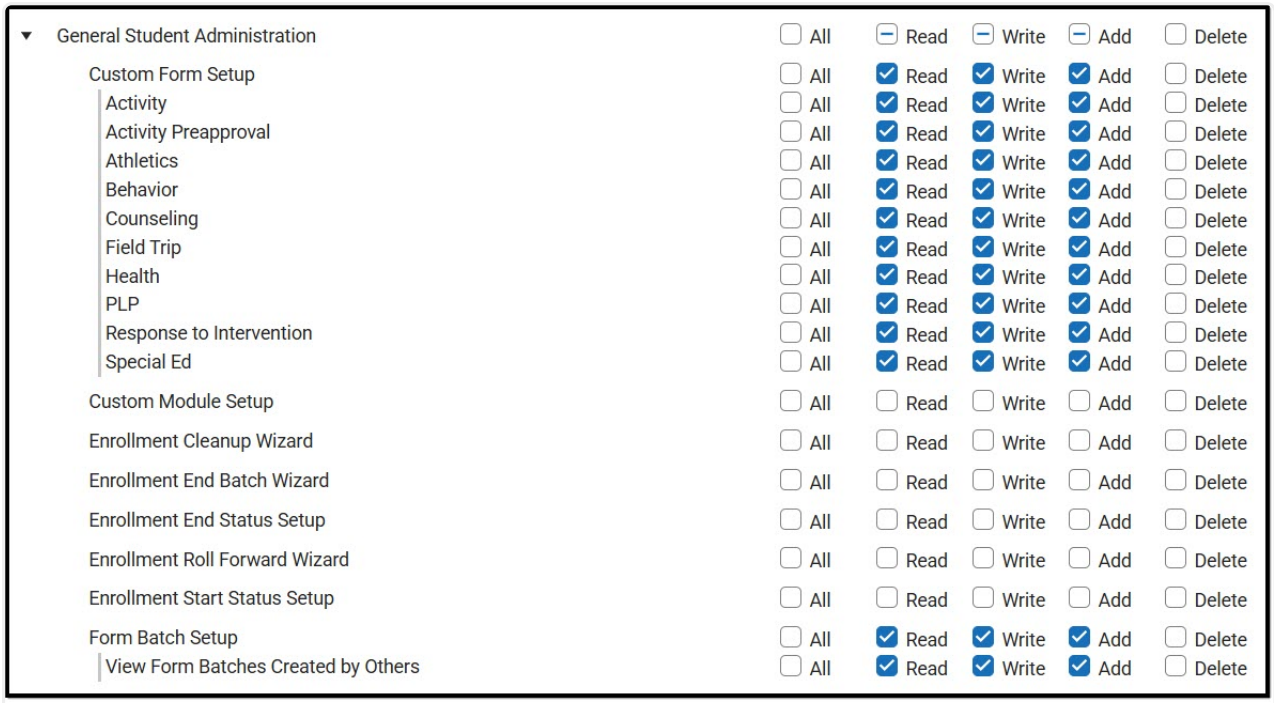
Form Batch Report in Message Center

Large print jobs are automatically broken up into multiple print jobs in the Batch Queue of 400-page chunks. When this occurs, the batch reports will be labeled with the same Batch ID and be denoted as Part 1, Part 2, etc.

Tool Rights

Tool Search: Tool Rights

To create a form batch for a module, users need to have tool rights to individual modules under the Forms tool (Tool Rights > Student Information > General > Forms > Module) and the Form Batch Setup tool (Tool Rights > Student Information > Form Batch Setup).



Form Batch Setup Tool Rights

Tool	Read	Write	Add	Delete
Form Batch Setup	View existing form batches.	Edit existing batches.	Create new batches.	Users do not need Module Delete rights to delete a batch.
View Form Batches Created by Others	View existing form batches created by other users. **Note**: Users must navigate to the Forms tool to view a specific form. This tool right is only associated with the batch itself.	N/A	N/A	N/A