

# **Manually Add Students**

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Students enrolled in the school associated with an activity can be manually added to an activity roster. This feature is useful if you would like to allow a student to participate but they do not match the criteria in the Ad hoc filter selected for the activity.

Students with past and future enrollments, in addition to current enrollments, can be manually added to an activity. When the **Add Individual Students** dropdown list is selected, Campus checks for enrollments 90 days in the past based on the **Registration Open Date** of the activity and enrollments 90 days in the future based on the **Activity End Date**.

Click here to expand...

In this example, the activity's registration open date is 08/05/2022. Students with a past enrollment end date of 05/07/2022 (08/05/2022 minus 90 days) or later can be manually added to this activity.

	Status			
Speed & Strength Camp	Registration Open			
				Add Individual Students Selecting a student will add them to the roster gri
Гуре				Type to search by name
Activity				
School(s)*	Activity Owners (Primary)*		Activity Owners (Secondary)	Abegg, Wallace (181900002)
Harrison High ×	Aarons, Samantha ×	×	, , , , , , , , , , , , , , , , , , ,	Alborough, Dallas (109301)
				Anderson, Jack (662478)
Registration Open Date	Registration Close Date		Created by	Anderson Jana (181900003)
08/05/2022	08/12/2022		Administrator, System	
		3		Atwood, Nadia (131900011)
Activity Start Date *	Activity End Date *			Barrons Demitri (201900004)
08/15/2022	08/26/2022			
Enrollments & Alborough, Dallas	Grade: N/A #109301 DOB: 01/01	/05 <b>Cou</b>	Student Int nselor: Hunter Counselor	formation > General > Enrollments Related Tools
Enrollments ☆ Alborough, Dallas Kew Print Enrollment History	Grade: N/A #109301 DOB: 01/01 Notice of Change in Enrollment	/05 Cou New E	Student Int nselor: Hunter Counselor nrollment History Documents	formation > General > Enrollments Related Tools
Enrollments A Alborough, Dallas K HS Graduation New Print Enrollment History Enrollment Editor	Grade: N/A #109301 DOB: 01/01 Notice of Change in Enrollment	/05 Cou	Student Ini nselor: Hunter Counselor nrollment History Documents	formation > General > Enrollments Related Tools
Enrollments ☆ Alborough, Dallas HS Graduation New Print Enrollment History Enrollment Editor Grade 1 Type Calendar	Grade: N/A #109301 DOB: 01/01 Notice of Change in Enrollment	/05 Cou New E	Student Ini nselor: Hunter Counselor nrollment History Documents	formation > General > Enrollments Related Tools
Enrollments ☆ Alborough, Dallas HS Graduation New Print Enrollment History Enrollment Editor Grade : Type Calendar 12 P 21-22 Harrison High Star Status: CMT Enrolled Enrolled Editor	Grade: N/A #109301 DOB: 01/01 Notice of Change in Enrollment Start Date 09/07/2021	/05 Cou New E End Date 06/08/20	Student Ini nselor: Hunter Counselor nrollment History Documents	formation > General > Enrollments Related Tools

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The activity's End Date is 08/12/2022. Students with a future enrollment date of 11/10/2022 (08/12/2022 plus 90 days) or earlier can be manually added to the activity. This example student's enrollment date is *after* 90 days, so his name does **NOT** appear on the Add Individual Students dropdown list.

Activity Name *	Status		Add Individual Students
Speed & Strength Camp	Registration Open		Selecting a student will add them to the roster gri
			Type to search by name 🔻
ype Activity			Fitzgerald, Sher (1195287)
cuvity			Flanders, Julice (1123)
school(s)*	Activity Owners (Primary)*	Activity Owners (Secondary)	
Harrison High ×	Aarons, Samantha × ×		Fleischmann, Christine (221900001)
registration Open Date	Registration Close Date	Created by	Fleischmann, Katherine (221900002)
//11/2022	07/28/2022	Administrator, System	Flowing Apps (1107)
			Fleming, Anne (1127)
Activity Start Date*	Activity End Date *		
● Enrollments ☆		Stud	dent Information > General > Enrollments
Fleischmann, Brent	Grade: 09 #221900003 DOB: 06/01/	07	Related Tools A
New 🖶 Print Enrollment Histor	y Notice of Change in Enrollment	New Enrollment History Documents	
Enrollment Editor			^
Grade 🗘 Type Calendar	Start Date 💠 End	i Date	
09 P 22-23 Harrison Hig Start Status: CM1 Enrolled End Status:	h 11/11/2022		

## **Manually Add a Student**

If a student is manually added, parents and students will not receive a notification about uploading documents until the activity is purchased (either in the Roster or Campus Parent/Student).

1. Click the **Roster** button on the activity.

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2. Type the student's name in the **Add Individual Students** field and select the student when their name displays.

Add Individual Students	
jack	× •
Pieper, Jack (#126317)	Ĩ
Schalk, Jackie (#129431)	

3. Campus adds the student with the status of "Pending Save," and they appear at the top of the roster until saved.



- 4. Mark the Required Forms Complete checkboxes. Optional
- 5. Click the Select Purchase Details in Option Purchased to add a payment. Optional
- 6. Click **Save** to save your changes.

# **Manage Form Participants and Details**

Activity Registration supports interactive custom forms. Interactive forms allow users to enter data directly into the PDF and electronically sign when registering for an activity. You can use the Activity Roster to review these forms and ensure everything is filled out correctly and/or signed.

When you manually add a student to the roster, all forms must be reviewed and if applicable sent for eSignature. Forms can then be filled out in the Campus Student and/or Campus Parent Portal in the Documents tool. District staff can also fill out forms (except for the eSignature) in the Activity Roster if necessary.

## **Request an eSignature**

After you manually add a student to a roster and complete forms as necessary, you can request an eSignature from parent/guardians and students when the form requires an eSignature. Requesting eSignatures makes the form read-only; i.e., you cannot make additional changes.

1. Select the form that requires an eSignature.

### **Result** The Form displays.

2. Click Review Participants. Result

The Form Details panel displays.

3. Click the **Request eSignatures** button.

Form Detail eSignatures	
Campus Parent	-
Anderson, Bonnie (Mother)	
Campus Student	-
Anderson, Jack (Student) REQUEST ESIGNATURE	
Request eSignatures	Close

### Result

A confirmation message displays.

4. Click Request eSignatures.

### Result



A confirmation message displays and the Form Detail panel closes. The eSignature statuses change to **Pending** on the Form Detail panel. Forms can then be filled out in the Campus Student and/or Campus Parent Portal in the Documents tool.

### **Reassign a Form for eSignature**

This option allows you to reassign a custom form to a user who did not have an active Campus Student or Campus Parent account when the student was registered for an activity.

1. Select the form that requires a signature.

### Result

The form displays in a side panel.

2. Click the **Reassign** button.



#### Result

An error message displays if the users does not have an active portal account. Otherwise, a confirmation message displays and the user can go to the Documents tool in the portal and complete the form.

### **Override an eSignature Request**

District staff cannot sign for students/parents; however, the eSignature can be overridden. As a best practice, <u>create a new contact log</u> to document any communication that resulted in overriding the eSignature.

Click here to expand...



Club Transportatio	on - Ab	begg, Dylan (1	71	Form Detail eSignatures		
				Campus Parent		-
			Ex	Abegg, Donald (Father)		
Throughout the yea	r, stude	ents may have opp	ortı	Campus Student		-
to off-site events. transportation statu help us prepare for	Transpo s of spe addres	ortation options v ecific events as the sing transportation	ary ey n ni	Abegg, Dylan (Student)		
	Step 1	I: Complete the St	udi	Override eSignature Request		-
	Step 2	2: Review the Tran	sp	Select Person(s) *		
	Step 3	4: Initial all Transpo	orti	🗹 Abegg, Dylan (Student)		
				Override Comment *		
				Student will not be attending events off of school property.		
Student Informat	ion					
Full Name		Jylan Victo	or			
Grade	1	10				
Teacher			2			4
Parent/Guardian	Signati	ure		Save Override		
Full Name		Donald A	۱Ł	Create New Contact Log		-
			_	Select Person(s) *		
Date		11/12/20	21	Abegg, Donald (Father) Abegg, Dylan (Student)		
				Date* Time*	-	
Transportation	ermis	sions		11/12/2020 🖬 1:50 PM	9	
I give my student transportation, ur	t permis nder the	ssion to ride with the supervision of ad	ne i Imi	Contact Options *		
Print Review Participa	ants	Cancel		Close		

 Select the form that requires a signature. It will say **Action Required** next to the form.

	Select	Student	Student Grade
_		Abegg, Dylan (#171900001) 🛋	11
		Required Forms *         Activity Registration w/e-signature         ACTION REQUIRED	

Result



The form displays.

2. Click Review Participants.

### Result

The Form Details panel displays.

3. Select the checkbox next to the person's name and then enter Comments explaining why you are overriding the eSignature.

Form Detail eSignatures	
Campus Parent	-
Abegg, Donald (Father)	
Campus Student	-
Abegg, Dylan (Student)	
Override eSignature Request	-
Select Person(s) *	
🗹 Abegg, Dylan (Student)	
Override Comment *	
Student will not be attending events off campus.	li li
Save Override	

4. Click Save Override.

### Result

A confirmation message displays as the status changes to Overridden.



### **Create a New Contact Log**

The Activity Roster allows you to record an communication you have with participants by phone, mail, email or in person.

- 1. Select the form where you want to add a Contact Log.
  - Result

The form displays.

2. Click Review Participants.

#### Result

The Form Details displays.

Form Detail eSignatures	
Create New Contact Log	-
Select Person(s) * ✓ Abegg, Donald (Father) ✓ Cardinal, Peggy (Student) Date * 11/12/2020	Time* 3:27 PM
Contact Options * 3: email Description *	
Sent email regarding required sig	natures.
Save Contact Log	
C	Close

- 3. Mark the checkboxes next to the appropriate person(s).
- 4. Adjust the Date and Time as necessary.
- 5. Select one of the following **Contact Options**: *1:Telephone, 2: U.S. Mail, 3: email, 4: In Person*.
- 6. Enter a **Description**.
- 7. Click Save Contact Log.

#### Result

Campus creates a contact log for each person you selected.



## Lock/Complete a Form

Required forms display the status **Action Required** until the form is locked. (Forms for manually added students do not display that status until the form is first opened.) A locked form indicates no additional changes can be made.

Locking and completing forms can be done manually or automatically.

If a form is interactive and it is marked as Required, then the **Complete** button appears. If the form is **NOT** interactive, but it is marked as Required, the **Lock** button appears. Both buttons perform the same function.

### Manually Lock/Complete a Form

Manually locking and completing forms gives you the chance to review a form and ensure the necessary information has been supplied and/or it has been signed.

- 1. Select the form that you want to Lock. It will say **Action Required** next to the form.
  - Result

ampus

The form displays.



Club Transportation - Abegg, Dylan (171900001)	Art Classes Brochure - Abegg, Robert (161900005)
	Custom Form - Art Classes Brochure
Extracurricu Permi Throughout the year, students may have opportunities to pa to off-site events. Transportation options vary; the leade transportation status of specific events as they become av help us prepare for addressing transportation needs.	PATTY'S PAINTING
Print 🔒 Complete Review Participants Cancel	Save & Stay Save Print 🔒 Lock Reassign Cancel

2. Click the **Complete** or **Lock** button.

### Result

The Complete Form or Lock Form confirmation message displays.

3. Click **Complete** or **Lock**.

### Result

A confirmation message displays saying the form is locked and the form's status changes to *Complete*.

### Automatically Lock/Complete a Form

Locking and completing forms is done automatically when you slide the **Auto Form Lock** toggle to **ON**. When a form has been completed and/or signed, the form is automatically locked and marked as Complete; the form does not require manual completion.

Activity Das	hboard ☆				Student Information > Activity Registration > Activity Dashboard
Activity Ro	ster - Film (	Club			
5 Total Students	5 Payment Complete	3 Form Complete		Auto Form Lock	Post to Course Section () Do Not Post to Course Section
Add Individual	Students rch by name	•	Registration Confirmation Process	Expand Details	Registration Status

## **Creating a Form Using Quick Form Fill**

The Quick Form Fill tool allows for custom forms in Activity Registrations to be populated with ad hoc data that is selected for the individual form fields. This tool will only appear when the data returned for the ad hoc provides multiple results and therefore needs input to decide which value to populate into the field. For example, a course name ad hoc populated into an Activity Registration form field will likely have multiple values returned. The Quick Form Fill tool will prompt for the correct course to populate on opening of the form. The Quick Form Fill tool is also available for parents/students to use in the School Store.

vity Roster	- Campus Science	: Fair						Campus Science Fair Consent Form - Test, Tyle
1	0 0		A	uto Form Lock	0	P	ost to Course Section 🚺	Quick Form Fill 1 Instructions
Total Pa tudents Co	ayment Form omplete Complete			OFF			Do Not Post to Course Section 🔹	This form is set to automatically populate data. In some instances, can be multiple results which means that your input is required. Plea
Individual Studer	ints	Registration Confirmation Process	Ex	pand Details		R	egistration Status	make selections below and then choose "Preview Form' to view the with the selections populated. Select "Create Form' once you are rea continue. If the ontions provided in the drop list(a) helow are inaccur.
pe to search by	y name 🔻	OFF		OFF			All	you can select "Create Form" without making any selections and fill the form manually.
Select	Student		Student Grade	Payment Complete	Required Forms Complete	Registration Confirmed	Option Purchased	Course Costion 1
		T					<b>T</b>	Course Section 1
								Course Name - Choose 1 Record
	Test, Tyler (#2319000 Required Forms * <u>Campus Science Fair</u>	01) 🖪 Consent Form.	10				Manual	
	Test, Tyler (#2319000 Required Forms * Campus Science Fair	01) д	10				Manual •	
emove	Test, Tyler (#2319000 Required Forms * Campus Science Fair	01) 🖪	10				Manual	,
emove	Test, Tyler (#2319000 Required Forms * Campus Science Fair H 25 • Stu	ents per page	10				Manual	

- 1. Select the Expand Details (+) of the student whose form you wish to fill in.
- 2. Select a form from the Required Forms.
- 3. Select from the Quick Form Fill options available.
- 4. Preview the form using the Preview Form button. It will appear in a new tab.
- 5. Click Create Form.

### Notes about the Quick Form Fill tool:

- Only the Roster version of Quick Form Fill tool will display contextual data (extra info to help the activity staff make the right selection).
- The first user to fill in the form in the Roster and/or Portal will get the Quick Form Fill tool.
- The Quick Form Fill tool does NOT function in the Documents tab or the Activity Registration viewing tool (it only works in the School Store and Activity Roster). If a form is clicked in either of these, it will populate non-ambiguous data and leave any ambiguous fields BLANK.

## **Add Roster Payments**

Roster Payment Processing allows for cash, check, and credit card transactions to be taken for an Activity from within the Activity Registration roster screen.

- 1. Click the **Roster** button of the activity that will be updated.
- 2. Add Individual Students via that search bar.
- 3. Click **Select Purchase Details** under Option Purchased. The payment side panel will appear on screen.

Student Information > Activity Registration > Activity Monitor
Payment - Cressman, Lorie
Take payment for students manually added to the Activity Roster. After the payment is processed, a receipt will be provided to print and the activity will no longer display in the School Store for this individual.
Payment Options (1)
Purchase Option * Film Club
Payment Method *
Submit Payment Cancel

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4. Select the Purchase Option and Payment Method.

If you are using the Mobile Payments app, refer to the <u>Mobile Payments Setup for Office</u> <u>Payments</u> guide for detailed setup instructions and additional information.

- 5. Enter the Payment Information.
- 6. Click **Submit Payment**. A Payment Recorded message will appear.
- 7. When finished, click Close.