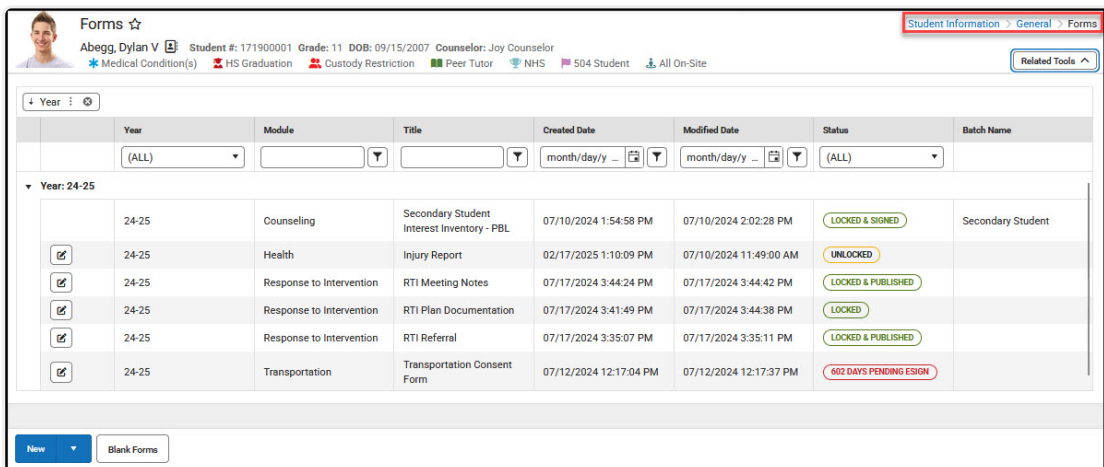


Forms Tool Rights

Last Modified on 12/22/2025 3:17 pm CST

The **Forms** tool stores and manages all [Custom Forms](#) attached to a student. Custom Forms added and edited using the module-specific Documents tools display in the Forms tool.

See the [Forms](#) article to learn more about how this tool is used.



The screenshot shows the 'Forms' tool interface for a student named Abegg, Dylan V. The interface includes a header with the student's name, ID, grade, DOB, and counselor. Below the header is a table listing forms. The table has columns for Year, Module, Title, Created Date, Modified Date, Status, and Batch Name. The forms listed are:

Year	Module	Title	Created Date	Modified Date	Status	Batch Name
24-25	Counseling	Secondary Student Interest Inventory - PBL	07/10/2024 1:54:58 PM	07/10/2024 2:02:28 PM	LOCKED & SIGNED	Secondary Student
24-25	Health	Injury Report	02/17/2025 1:10:09 PM	07/10/2024 11:49:00 AM	UNLOCKED	
24-25	Response to Intervention	RTI Meeting Notes	07/17/2024 3:44:24 PM	07/17/2024 3:44:42 PM	LOCKED & PUBLISHED	
24-25	Response to Intervention	RTI Plan Documentation	07/17/2024 3:41:49 PM	07/17/2024 3:44:38 PM	LOCKED	
24-25	Response to Intervention	RTI Referral	07/17/2024 3:35:07 PM	07/17/2024 3:35:11 PM	LOCKED & PUBLISHED	
24-25	Transportation	Transportation Consent Form	07/12/2024 12:17:04 PM	07/12/2024 12:17:37 PM	602 DAYS PENDING ESIGN	

Below the table, there are buttons for 'New' and 'Blank Forms'. The breadcrumb trail at the bottom reads: Student Information > General > Forms.

The Forms tool cannot be used to attach a Custom Form to a student for Activity, Activity Preapproval, or Athletics.

Only Custom Forms display in the Forms tool. Follow the links below for information about the document types available in each module:

- [Counseling](#)
- [Health](#)
- [PLP](#)
- [Response to Intervention](#)
- [Special Ed](#)

Available Tool Rights

Expand to view all available Forms tool rights. Each module's set of Forms tool rights (Counseling, Health, PLP, etc.) function the same. The set of rights under a tool folder is Custom Forms, Unlock, and Blank Forms options. Rights must be selected for each tool within the Forms folder. Granting rights for the Counseling tool does not automatically grant rights for the Special Ed module. See the Example section below for more information. *(Does not apply to Activity, Activity Preapproval, or Athletics.)*

► [Click here to expand...](#)

Forms	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Activity	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Activity Preapproval	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Athletics	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Behavior	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Custom Forms	<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
Copy	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Blank Forms	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Override	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Counseling	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Custom Forms	<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
Copy	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Blank Forms	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Override	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Field Trip	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Health	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Custom Forms	<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
Copy	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Blank Forms	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Override	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
PLP	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Custom Forms	<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
Copy	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Blank Forms	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Override	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Response to Intervention	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Custom Forms	<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
Copy	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Blank Forms	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Override	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Transportation	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Custom Forms	<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
Copy	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Blank Forms	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Override	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Special Ed	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Custom Forms	<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
Copy	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Blank Forms	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Override	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete

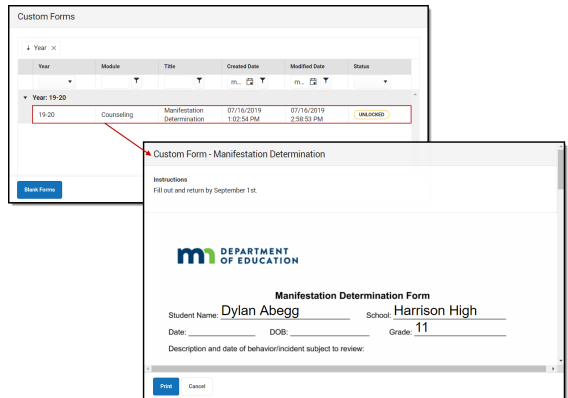
Subrights are in italics.

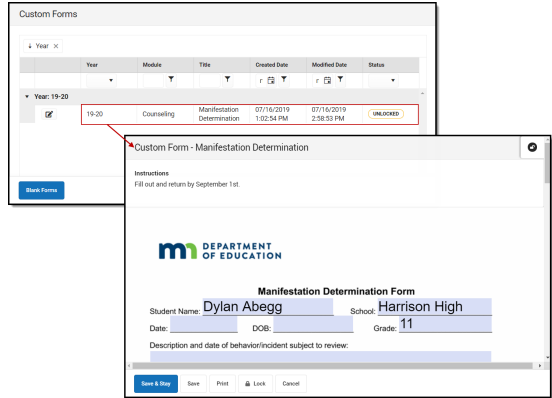
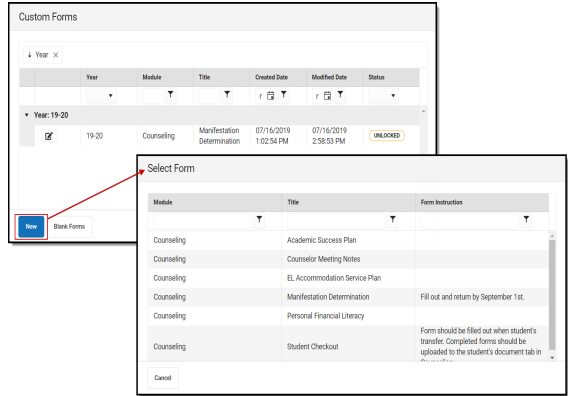
R	W	A	D
Tool (Counseling, Health, etc.)			


R	W	A	D
<ul style="list-style-type: none"> Rights assigned at the folder level give those rights to all features within the module. For example, giving Read rights to the Forms > Counseling folder assigns Read rights to all tools within that folder. <p>This tool right is either turned on or off. Granting W, A, or D rights do not add additional functionality.</p>	N/A	N/A	N/A
Custom Forms			
<ul style="list-style-type: none"> View and print existing Custom Forms. Users will not see any existing Custom Forms for tools in which they do not have rights. View and print a PDF version of locked Custom Forms via the Roster. <p>See the Roster article for additional information.</p>	<ul style="list-style-type: none"> Edit and lock existing Custom Forms. In-line edit the year in which the form is organized. 	<ul style="list-style-type: none"> Add new and copy existing Custom Forms. 	<ul style="list-style-type: none"> Permanently delete Custom Forms. <p>Once an eSignature request has been sent, users cannot delete the form, regardless of tool rights.</p>
Unlock			
<ul style="list-style-type: none"> Unlock a locked Custom Form. <p>This tool right is either turned on or off. Granting W, A, or D rights do not add additional functionality.</p>	N/A	N/A	N/A
Copy			

R	W	A	D
<ul style="list-style-type: none"> Copy existing custom forms. <p>This tool right is either turned on or off. Granting W, A, or D rights do not add additional functionality.</p>	N/A	N/A	N/A
Blank Forms			
<ul style="list-style-type: none"> View and print any existing Blank Forms created for the tool. <p>This tool right is either turned on or off. Granting W, A, or D rights do not add additional functionality.</p>	N/A	N/A	N/A
Override			
<ul style="list-style-type: none"> Override eSignature(s). <p>Users must have the Write tool right for Custom Forms in order to override.</p>	N/A	N/A	N/A

Examples

User	Rights	Example
Read Only	Student Information > General > Forms > Module > Custom Forms = R and Blank Forms = R	<p>This right allows the user to view and print existing documents, but they cannot make edits or create additional documents.</p> 

User	Rights	Example
Write	Student Information > General > Forms > Module > Custom Forms = W	<p>With Write rights, a user can see all records in the Forms list screen and click the edit button to change the year for the document.</p> <p>After selecting the document, the user can make changes to any field, Save changes, Print, or Lock the document.</p>  <p>The screenshot shows the 'Custom Forms' list with columns for Year, Module, Title, Created Date, Modified Date, and Status. A row for '19-20' is selected. Below the list, the 'Custom Form - Manifestation Determination' form is shown with fields for Student Name (Dylan Abegg), School (Harrison High), Date, DOB, and Grade (11). The form includes instructions and a 'Start & Stop' button.</p>
Add	Student Information > General > Forms > Module > Custom Forms = A	<p>With Add rights, a user can click the new button to create a new document for the student.</p> <p>The Add right also allows the user to copy existing forms.</p>  <p>The screenshot shows the 'Custom Forms' list with a 'New' button highlighted. Below the list, the 'Select Form' dialog is shown with columns for Module, Title, and Form Instruction. The dialog lists various forms like 'Academic Success Plan', 'Counselor Meeting Notes', 'EL Accommodation Service Plan', 'Manifestation Determination', 'Personal Financial Literacy', and 'Student Checkout'.</p>

User	Rights	Example
<div>Delete and Unlock <i>Assign these rights with caution</i></div>	<div>Student Information > General > Forms > Module > Custom Forms = D and Unlock = R</div>	<div><p>With these rights, the Delete and Unlock buttons can be used.</p><div><div>Custom Form - Manifestation Determination</div><div>Instructions Fill out and return by September 1st.</div><div></div><div>Manifestation Determination Form</div><div>Dylan Ahern Harrison Hinh</div><div><div>Print</div><div>Unlock</div><div>Cancel</div><div>Delete</div><div>Copy</div></div></div></div>
<div>Blank Forms Only</div>	<div>Student Information > General > Forms > Module > Blank Forms = R</div>	<div><p>With this right, the Blank Form button can be used to select and print a Blank Form.</p><div><div><div>Custom Forms</div><div><div>Year</div><div>Module</div><div>Title</div><div>Created Date</div><div>Modified Date</div><div>Status</div></div><div>No records to display</div><div><div>Blank Form</div></div></div><div><div>Select Blank Form</div><div><div>Module</div><div>Title</div></div><div><div>Counseling</div><div>Field Trip Form</div></div><div><div>Counseling</div><div>NHS Service Form</div></div><div><div>Counseling</div><div>Scholarship Reporting Form</div></div><div><div>Counseling</div><div>Student of the Month Award</div></div><div><div>Counseling</div><div>Student Transfer Form</div></div><div>Cancel</div></div></div></div>

Suggested User Groups

Some groups may only need Read access to the information displayed in this tool.

- [Counselors](#)
- [Front Office](#)
- [Health Office](#)
- [Special Ed](#)
- [Principals](#)

See [User Groups and Suggested Roles](#) for more information.

