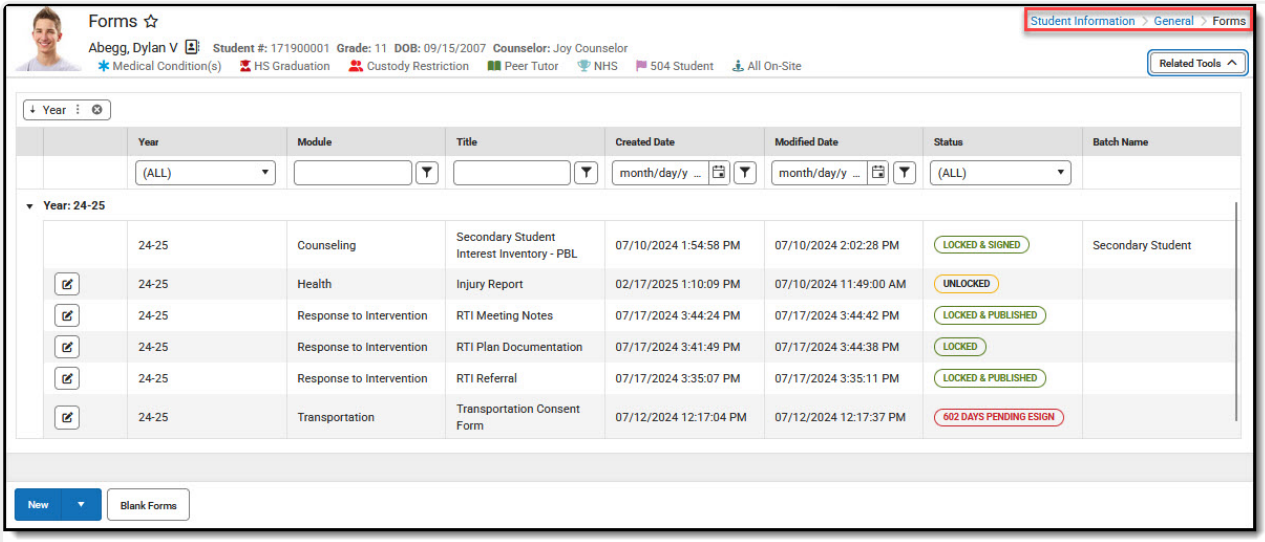
Forms Tool Rights

Last Modified on 03/07/2025 10:30 am 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.



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	

Student Information > General > Forms

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

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

Available Tool Rights

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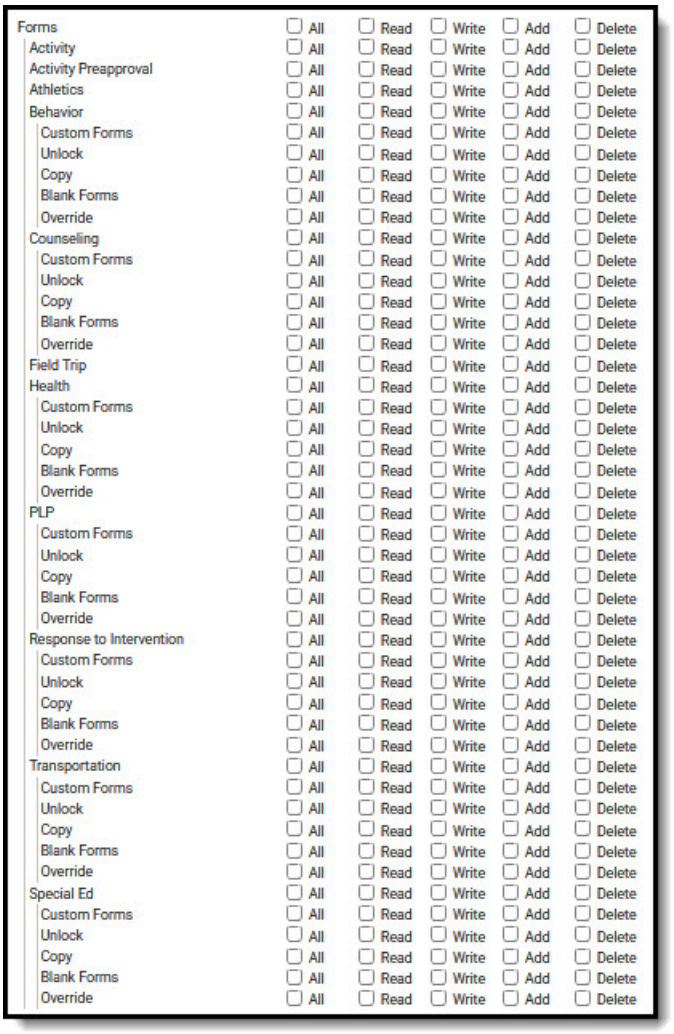
Expand to view all available Forms tool rights. Each module's set of Forms tool rights (Counseling, Health, PLP, etc.) function the same. The set of rights under a tool folder are Custom Forms, Unlock, and Blank Forms options. Rights must be selected for each tool within the Forms folder. Granting rights 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...



Right	R	W	A	D
Forms	In order			

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Right	R	W	A	D
Tool i.e. Counseling, Health, etc.	Rights assigned at the folder level give those rights to all features within the module. For example, giving **R** rights to the Forms > Counseling folder assigns **R** rights to all tools within that folder. This tool right is either turned on or off. Granting W, A, or D rights do not add additional functionality.	N/A	N/A	N/A
Custom Forms	**R** rights allows the user to view and print existing Custom Forms. Users will not see any existing Custom Forms for tools in which they do not have rights. **R** rights allows users to view and print a PDF version of locked Custom Forms via the Roster. See the Roster documentation for additional information.	**W** rights allows the user edit and lock existing Custom Forms. This also allows the user to in-line edit the year in which the form is organized. If **W** rights are granted, **R** rights are automatically granted.	**A** rights allows the user to add new and copy existing Custom Forms. If **A** rights are granted, **R** and **W** rights are automatically granted.	**D** rights allows the user to permanently delete Custom Forms. If **D** rights are granted, **R**, **W**, and **D** rights are automatically granted. Once an eSignature request has been sent, users cannot delete the form, regardless of tool rights.

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Right	R	W	A	D
Unlock	**R** rights allows the user to unlock a locked Custom Form. This tool right is either turned on or off. Granting W, A, or D rights do not add additional functionality.	N/A	N/A	N/A
Copy	**R** rights allows the user to Copy existing custom forms. This tool right is either turned on or off. Granting W, A, or D rights do not add additional functionality.	N/A	N/A	N/A
Blank Forms	**R** rights allows the user to view and print any existing Blank Forms created for the tool. This tool right is either turned on or off. Granting W, A, or D rights do not add additional functionality.	N/A	N/A	N/A
Override	**R** rights allows the user to override eSignature(s). Users must have the **W**rite tool right for Custom Forms in order to override.	N/A	N/A	N/A

Examples

User	Rights	Example

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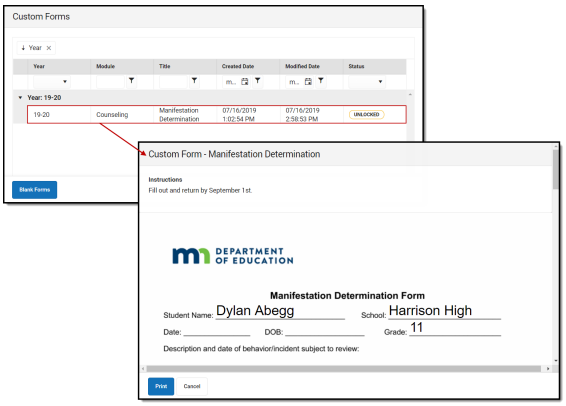
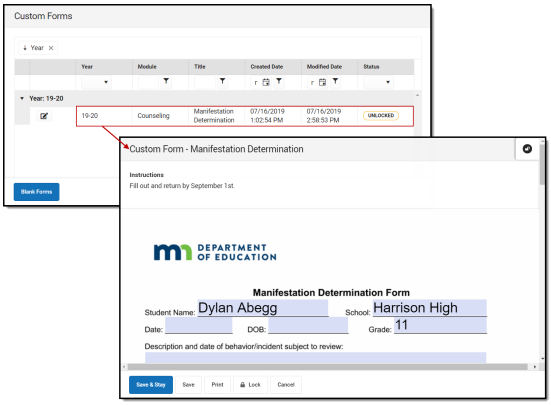
User	Rights	Example
Read Only	*Student Information > General > Forms > Module > Custom Forms = R and Blank Forms = R*	This right allows the user to view and print existing documents, but they cannot make edits or create additional documents.  *Image 3: Read Only Rights Example*
Write	*Student Information > General > Forms > Module > Custom Forms = W*	With **W** 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. After selecting the document, the user can make changes to any field, Save changes, Print, or Lock the document.  *Image 5: Write Rights Example*

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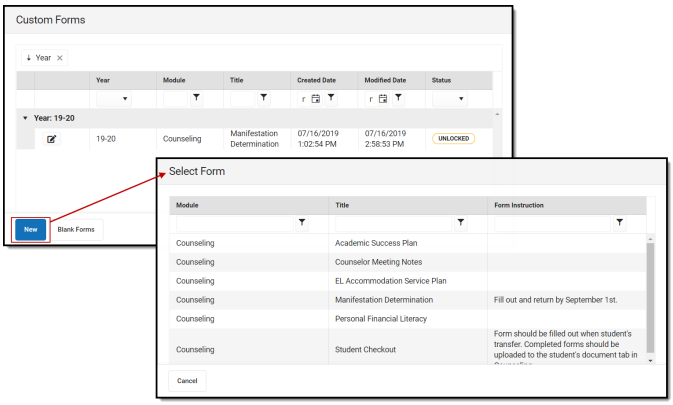
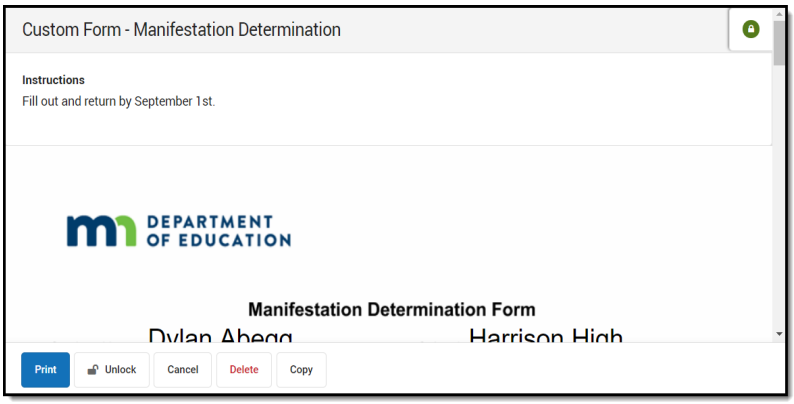
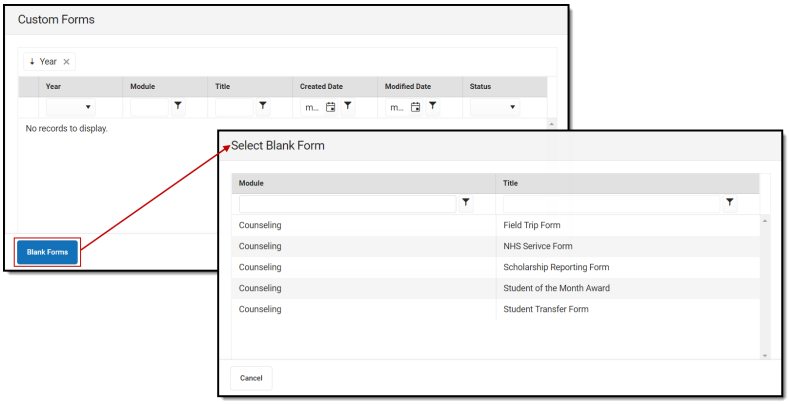
User	Rights	Example
Add	*Student Information > General > Forms > Module > Custom Forms = A*	With **A** add rights, a user can click the **new** button to create a new document for the student. The **A** right also allows the user to copy existing forms.  *Image 7: Add Rights Example*
Delete and Unlock *Assign these rights with caution*	*Student Information > General > Forms > Module > Custom Forms = D and Unlock = R*	With these rights, the Delete and Unlock buttons can be used.  *Image 9: Delete and Unlock Rights Example*
Blank Forms Only	*Student Information > General > Forms > Module > Blank Forms = R*	With this right, the Blank Form button can be used to select and print a Blank Form.  *Image 11: Blank Rights Example*

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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.

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