

Version a custom form

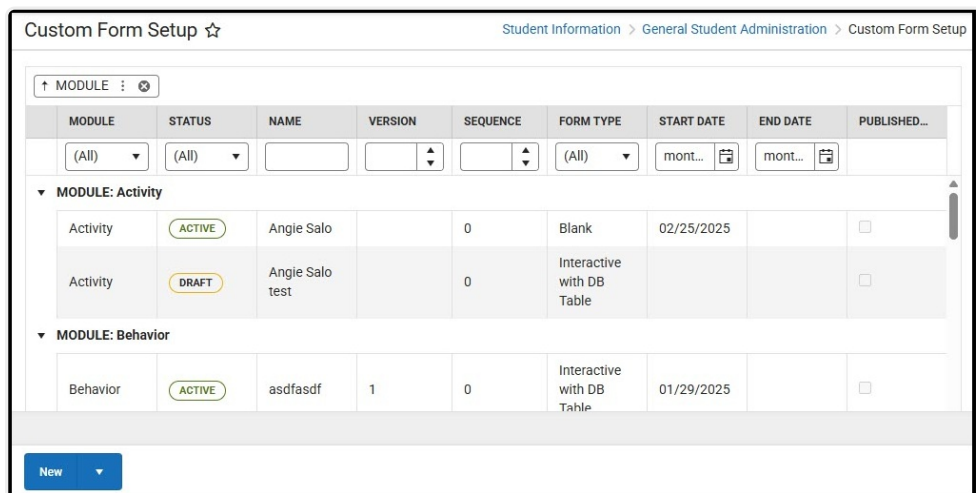
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Path: Student Information > General Student Administration > Custom Form Setup

Users can version existing Custom Forms to preserve certain configurations from a previous version. This allows users to correct typos, update verbiage due to state or district changes, create a new form for the next school year, and keep a view of how the form has changed over time.

This guide explains how to version a custom form.



MODULE	STATUS	NAME	VERSION	SEQUENCE	FORM TYPE	START DATE	END DATE	PUBLISHED...
(All)	(All)				(All)	mont...	mont...	
▼ MODULE: Activity								
Activity	ACTIVE	Angie Salo		0	Blank	02/25/2025		☐
Activity	DRAFT	Angie Salo test		0	Interactive with DB Table			☐
▼ MODULE: Behavior								
Behavior	ACTIVE	asdfasdf	1	0	Interactive with DB Table	01/29/2025		☐

Custom Form Setup tool list screen

Before you start

- An existing custom form must exist before it can be versioned.
- Make sure you have a new PDF file saved to your computer before attempting to version a custom form. See the [Custom Form Creation](#) article for additional guidance.
- See the [Custom Form Setup Tool Rights](#) for additional information.

Version a custom form

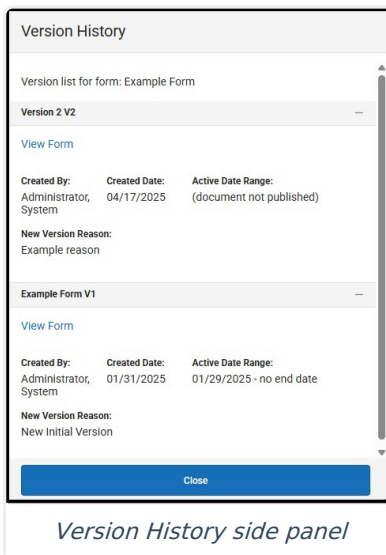
1. Select an existing form. The **Upload** screen displays. For field descriptions, see the [Upload](#) section of this article.
2. Click the **New Version** button from the action bar.
3. All the form configurations from the previous version are copied to the new version, but can be modified. The version number automatically sequences to the next integer. This displays below the name field.
4. Click the **Select file...** button to upload and select the new PDF version for this form. Most updates to a new version of a form are made in Adobe.

5. Enter a description into the **New Version Reason Description**. This field is limited to 500 characters and allows users to track a history of changes for this form.
6. Click **Save & Next**. The **Prepopulate Fields** screen displays. Navigate through the [Prepopulate Fields](#), [Configure Table](#), and [Define Rules](#) steps of the process.
 - All mappings, database configuration, and rules are copied from the previous form version.
 - Existing mappings and rules can be modified, **but the existing database configuration cannot be changed**. Only new fields can be modified on the Configure Table screen.
 - When a field that is part of a rule on the Define Rules step is removed, that rule is automatically removed.
7. Navigate to the [Publish](#) screen after completing the previous steps.
8. Enter a **Start Date** for the new version.
9. Click **Finish** when ready. The new version now displays in the list screen and is available to attach to students.

Impact

- A new version of the form is now available and can be added for students.
- If you are a state-edition user and the form was marked for publication to districts, the new version of the form is now available to district users.
- The previous version no longer displays in the Custom Forms Setup list screen as of the Start Date of the new version. See the [Version Start and End Date logic](#) explanation for additional information.

View version history



1. Select an existing form from the list screen that has multiple versions. The Upload Screen displays.
2. Click the **Version History** button from the action bar.
3. The **Version History** side panel displays all versions for this form entry. Each section can be expanded or collapsed to view or hide the details. The **View Form** link allows users to download the PDF associated with that specific version.

What's next

- Existing data from the previous version(s) can be queried in Ad hoc.
 - Alert staff who need to add the new form version to their students' Forms tool or module-specific Documents tools.
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