# Student Form Center

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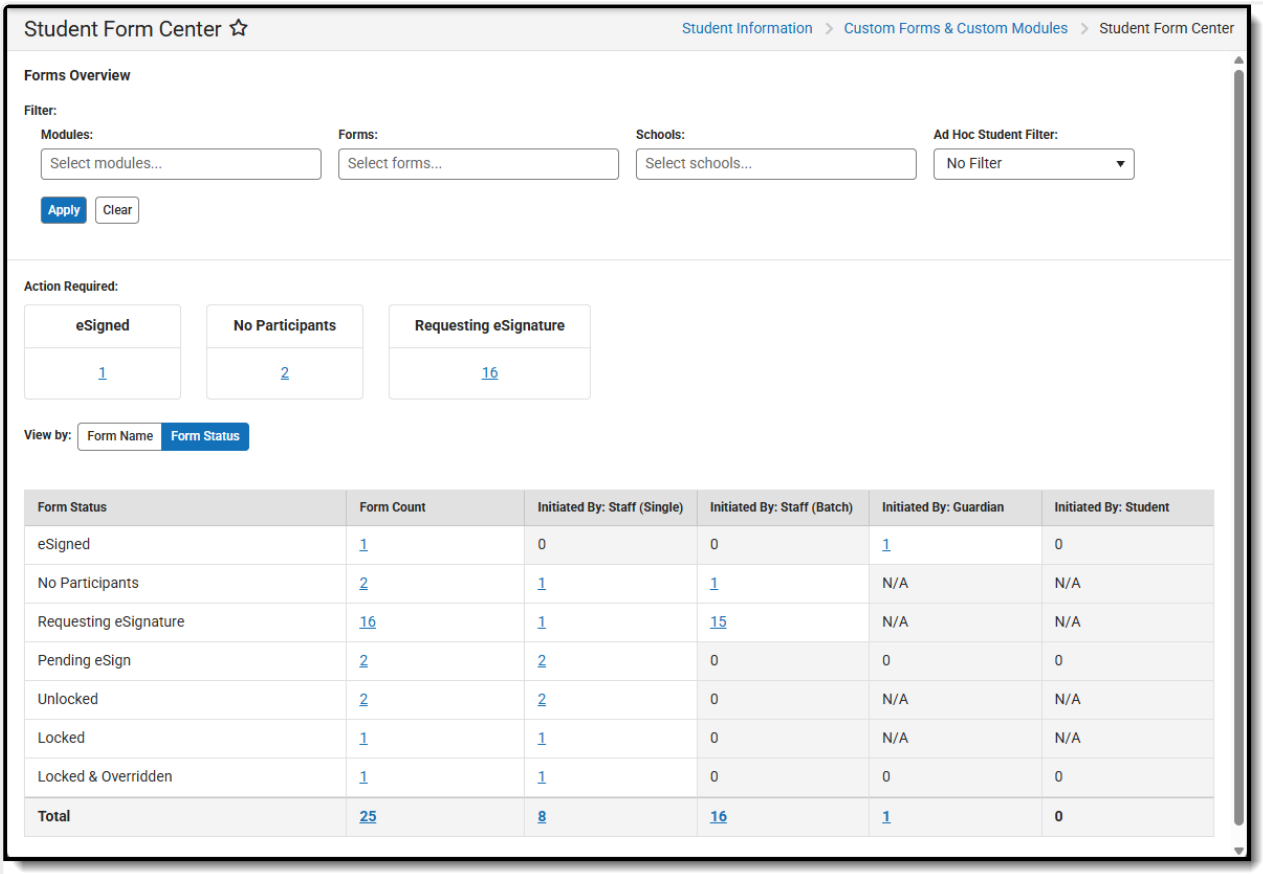
Path: Student Information > Custom Forms and Custom Modules > Student Form Center

The Student Form Center allows administrators to find and view custom forms assigned to students using various filter options. Instead of locating custom forms for a single student at a time, administrators can use this tool to quickly find and manage forms across multiple students.




| Form Status | Form Count | Initiated By: Staff (Single) | Initiated By: Staff (Batch) | Initiated By: Guardian | Initiated By: Student |
|---|---|---|---|---|---|
| eSigned | 1 | 0 | 0 | 1 | 0 |
| No Participants | 2 | 1 | 1 | N/A | N/A |
| Requesting eSignature | 16 | 1 | 15 | N/A | N/A |
| Pending eSign | 2 | 2 | 0 | 0 | 0 |
| Unlocked | 2 | 2 | 0 | N/A | N/A |
| Locked | 1 | 1 | 0 | N/A | N/A |
| Locked & Overridden | 1 | 1 | 0 | 0 | 0 |
| **Total** | **25** | **8** | **16** | **1** | **0** |

*The Student Forms Center tool displays an overview of forms in a grid with filtering options at the top of the screen.*

See the Student Form Center Tool Rights article for information about required tool rights for this tool.

## Forms Overview

The Forms Overview screen provides a summary of forms assigned to students, either by name or by status, in a grid. By default, all forms for all modules for which the user has tool rights display.

This tool is school-year specific. Forms that display change when selecting a different school year in the context switcher.

The **Filter** options can narrow the results in the grid by Module, Form name, School, and pre-established Ad hoc Student Filters. Click the **Apply** button to apply the selected filter options, and click **Clear** to remove all filters. Any filter applied is retained for the user when they return to this tool. Filters are cleared out when selecting a different school in the context switcher.

The **Action Required** section provides a quick overview of forms requiring administrator action. When no forms require action, this section does not display.

The **View By** options change the form grid to view forms by Form Name or Form Status.

Any underlined value in the grid can be selected to view those forms. Cells with 0 (zero) mean that no forms with that status are assigned to students. Cells with N/A mean that forms with that status condition cannot exist. For example, a "No Participant" status form can not exist for forms initiated by guardians.

## View By Form Name

The following table describes the column names for the Form Name grid. For more information about form statuses, see the Form status groups and descriptions section of this article.

| Column name | Description |
|---|---|
| **Form Name** | The name of the form. |
| **Module** | The module in which the form is organized. |
| **Form Count** | The total number of forms assigned to students. |
| **Form Status Group: Action Required** | The number of forms that require action. |
| **Form Status Group: Pending eSignature** | The number of forms in a pending eSignature status. |
| **Form Status Group: Unlocked** | The number of forms in an unlocked status. |
| **Form Status Group: Locked** | The number of forms in a locked status. |

## View By Form Status

The following table describes the column names for the Form Status grid. For more information about form statuses, see the Form status groups and descriptions section of this article.

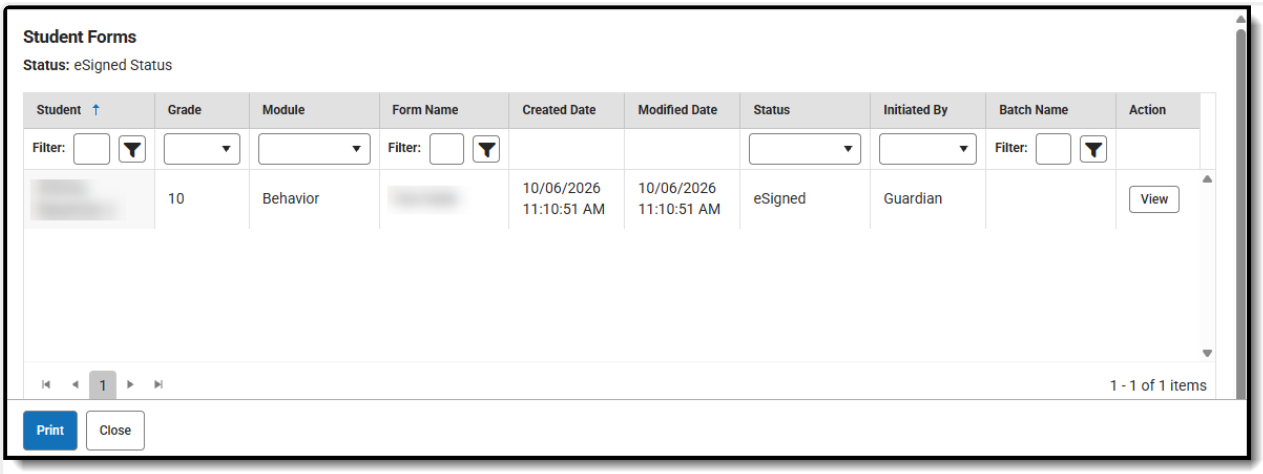
| Column name | Description |
|---|---|
| **Form Status** | The status of the forms. |

| Column name | Description |
|---|---|
| **Form Count** | The number of forms with that specific status. |
| **Initiated By: Staff (Single)** | The number of forms with that status that were created by a staff member using the Forms tool. |
| **Initiated By: Staff (Batch)** | The number of forms with that status that were created by a staff member using the Custom Form Batch Setup tool. |
| **Initiated By: Guardian** | The number of forms with that status that were initiated on the Portal by the student's guardian. |
| **Initiated By: Student** | The number of forms with that status that were initiated on the Portal by the student. |

# Student Forms screen

The Student Forms screen displays after users click any count from the Form Overview screen. This screen is dynamic and changes based on the user's selections and the filters they apply. The information at the top of the screen lists the user's selection and any filters applied from the previous screen. The grid displays students and their assigned forms based on these criteria. Users can sort and filter the grid further to locate specific students or forms.

Click **Print** to print all forms in the grid. This may be a large print job.




*The Student Forms screen displays all student forms in a grid based on the filtering options selected on the Forms Overview screen.*

## Student Forms column descriptions

The following table describes what each column on the Student Form screen means.

| Column name | Description |
|---|---|
| **Student** | The name of the student. |
| **Grade** | The student's grade. |
| **Module** | The module in which the form is aligned. |
| **Form Name** | The name of the form. |
| **Created Date** | The date the form was created for the student. |
| **Modified By** | The date the form was last edited. |
| **Status** | The state of the form. For more information about form statuses, see the Form status groups and descriptions section of this article. |
| **Initiated By** | Indicates who initiated the form. |
| **Batch Name** | The name of the batch that assigned the form to the student, when applicable. |
| **Action** | The **View** button navigates the user to that specific form instance. For information about form administration functionality, see the Forms article. |

# Form status groups and descriptions

Forms can be in the following statuses:

## Non-eSignature form statuses

| Status group | Status(es) and description(s) |
|---|---|
| **Action Required** | **Draft**: The form contains errors that must be corrected before completion. |
| **Unlocked** | **Unlocked**: The form contains no errors. |
| **Locked** | • **Locked**: The form is complete and locked. No further edits can be made.<br>• **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.<br>• **Locked and Pending Publish**: The form is complete and will be published to the Portal on a future date. |

## eSignature form statuses

| Status group | Status(es) and description(s) |
| --- | --- |
| **Action Required** | • **Draft**: The form contains errors that must be corrected before completion.<br>• **Declined Terms and Conditions**: One or more participants declined the terms and conditions.<br>• **eSigned**: Indicates all signatures are collected and the form is ready to be completed.<br>• **Expired**: The End Date of the form has passed.<br>• **No Participants**: There are no active Portal accounts.<br>• **Requesting eSignature**: The form is set up for eSignature, assigned to a student, and has not yet been sent for eSignature. |
| **Pending eSignature** | • **Pending eSign**: The signature request was sent to the Portal and is awaiting eSignature.<br>• **Pending eSign (Future)**: The form will be sent to the Portal for eSignature on a future date. |
| **Unlocked** | **Unlocked**: The user has confirmed there are no participants. The form is read-only on the Portal. |
| **Locked** | • **Locked and Signed**: The form is complete, and all participants have signed the document. No further edits can be made.<br>• **Locked and Declined**: The form is complete, and a participant declined the document. No further edits can be made.<br>• **Locked and Overridden**: The form is complete, and the user has overridden at least one signature. No further edits can be made. |