Publish custom forms to districts (State Edition)

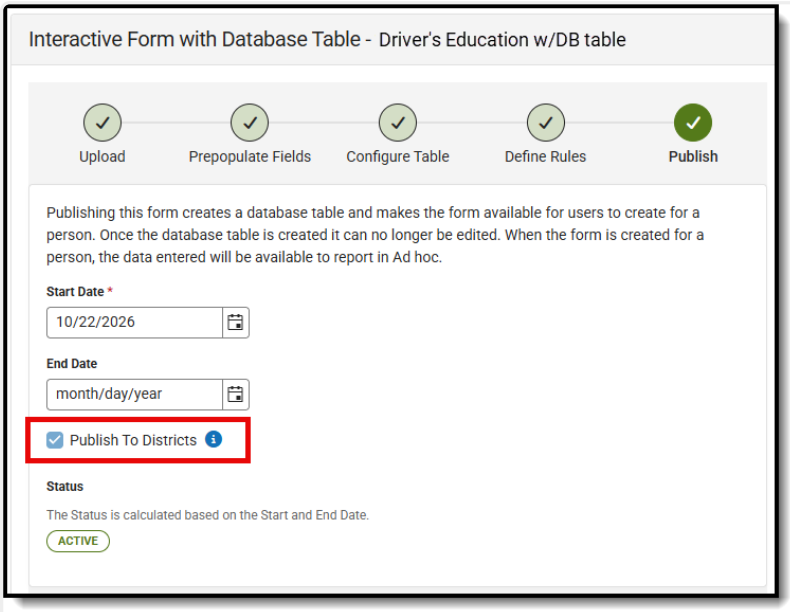
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Path: Student Information > Custom Forms and Custom Modules > Custom Form Setup

State edition users can publish custom forms to district edition users. Interactive, Interactive Forms with Database Tables, and eSignature forms published from the state sync back to the state when saved and locked. Blank Forms can also be pushed down from the State.

Currently, custom module forms do not have this functionality. The state-edition publish feature is available for the following modules: Behavior, Counseling, Health, Response to Intervention, Special Education, PLP, ILPA (Kentucky only), and Driver's Education (Delaware only).

This guide explains how state edition users can publish custom module forms to their districts. For more information, see the Custom Form Setup - Start here article.



The Publish screen for an interactive database table form on the Custom Forms Setup tool (Delaware-specific example).

Before you start

- Make sure you have a PDF of the form saved to your computer before attempting to upload it to Campus. See the Custom Form Creation article for additional guidance.
- For interactive forms with database tables, the database table must be created first before State Edition users can publish the form to districts. Users must create the form first, then return to the form to publish it to districts. This process is detailed below.
- Administrators must have the **Publish to District** tool right for the Custom Form Setup tool to publish forms from the state to the district.
- Staff must have module-specific Forms tool rights to assign the form to a student.

Publish an interactive database table custom form from the state to the district

This guide does not go into detail about how to navigate through the entire custom form upload process. See the Custom Form Setup article for information about each step in the workflow, field descriptions, Ad hoc query information, and additional functionality.

1. Click **New** on the Custom Form Setup tool list screen. The **Custom Form Type** selection screen displays.
    - Shortcut: Click the down arrow on the **New** button and select the form type to skip the **Custom Form Type** selection screen and go directly to the **Upload** screen.
2. Select **Interactive Form with Database Table**, then click the **Next** button. The **Upload** screen displays.
3. Select the desired module from the **Module** dropdown. Fill out the remaining fields as desired and select the PDF file from your computer.
4. Navigate the remaining steps: Prepopulate Fields, Configure Table, Define Rules, and Publish.
5. Click **Finish** when complete. You are automatically navigated back to the Custom Form Setup list screen.
6. Select the form you just created and navigate to the **Publish** screen.
7. Mark the **Publish to Districts** checkbox.
8. Click **Finish**.

Publish an interactive custom form from the state to the district

1. Click **New** on the **Custom Form Setup** tool list screen. The **Custom Form Type** selection screen displays.
    - Shortcut: Click the down arrow on the **New** button and select the form type to skip the **Custom Form Type** selection screen and go directly to the **Upload** screen.
2. Select **Interactive Form**, then click the **Next** button. The **Upload** screen displays.
3. Select the desired module from the **Module** dropdown. Fill out the remaining fields as desired and select the PDF file from your computer.
4. Navigate the remaining steps: Prepopulate Fields, Define Rules, and Publish.
5. Mark the **Publish to District** checkbox on the **Publish** screen.
6. Click **Finish**.

Publish a blank custom form from the state to the district

1. Click **New** on the Custom Form Setup tool list screen. The **Custom Form Type** selection screen displays.
    - Shortcut: Click the down arrow on the **New** button and select the form type to skip the **Custom Form Type** selection screen and go directly to the **Upload** screen.
2. Select **Blank Form**, then click the **Next** button. The Upload screen displays.
3. Select the desired module from the **Module** dropdown. Fill out the remaining fields as desired and select the PDF file from your computer.
4. Mark the **Publish to Districts** checkbox.

5. Click **Finish**.

Impact

The custom form is available at the district to assign to students. It may take a little while for the district to receive the form. When a future Start Date is entered, the form will be available at the district on that date.

Delete or end-date a form

State edition-published custom forms can only be deleted at the state level when they have not yet been assigned to a student at the district level. When a state no longer wants a form available to districts, enter an **End Date** for the form to make it inactive.

What's next

- Alert districts that the new form is now available for assignment to students.
- Assign the new forms to users from the Forms tool.
- When a new version of the form is available, follow the steps in the Version a custom form article.
- See the Troubleshooting Custom Form Documents article if you need help or run into errors.