



ASCENDER GUIDES



## **Admin - Custom Forms - Create Custom Form**



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# Admin - Custom Forms - Create Custom Form

## ASCENDER ParentPortal Admin > Form Management > Custom Forms > Create Custom Form

This page is only available to users who log on to ASCENDER ParentPortal with a district- or campus-level security administrator user name.

This page allows administrative users to create customized forms that can be used during Student Enrollment and Online Registration.

## Step 1

If selecting *English and Spanish* for **Language**, the English version will be created first. To translate into a Spanish version, use [Custom Forms > Edit Custom Forms](#).

### Form Properties:

☐ Add the form.

### Create Custom Form

Step One

Step Two

Form Properties

Form Name:

Form Descriptions/Instructions:

Campus:

Language:

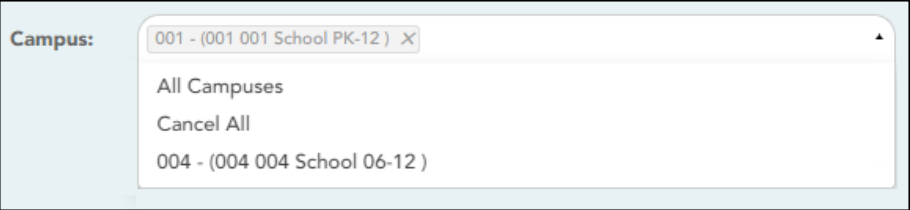
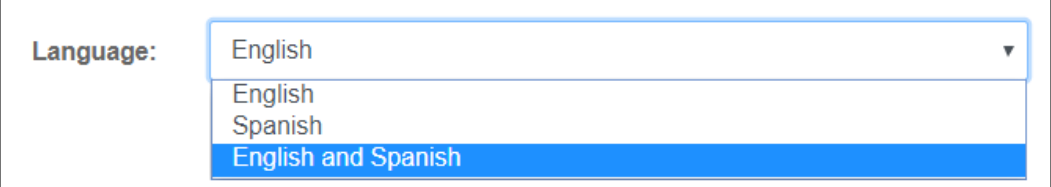
English

Previous

Next

Cancel

|                                       |                                                                                                                                                         |
|---------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Form Name</b>                      | Type a name for the form, using up to 50 characters. For a <i>Spanish</i> form, provide the name in Spanish.                                            |
| <b>Form Descriptions/Instructions</b> | Type any specific district-level instructions for the form, using up to 500 characters. For a <i>Spanish</i> form, provide the instructions in Spanish. |

|                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Campus</b>   | <p>(Required) Select a campus in order to assign the form to a specific campus. Or, select <i>All Campuses</i> if the form is used for all campuses in the district.</p> <p>If you select <i>All Campuses</i>, each campus is listed, and you can remove individual campuses if needed.</p>  <p><b>NOTE:</b> If you select <i>All Campus</i> by mistake, click <i>Cancel All</i> to clear all campuses at once.</p> |
| <b>Language</b> | <p>Select the language of the form.</p> <p>If you need the form in both English and Spanish (now or in the future), select <i>English and Spanish</i>. This creates a duplicate of the English form that can later be translated into Spanish on <a href="#">Custom Forms &gt; Edit Custom Forms</a>.</p> <p><b>WARNING:</b> Once the language option is selected, it cannot be changed.</p>                        |

☐ Click **Next**.

## Step 2

### Question Format Types:

## Create Custom Form

Step One    Step Two

Add Question

Drag a field from the right to this area

- H Header
- ¶ Paragraph
- 📅 Date Field
- # Number Field
- ☑ Radio button
- ☑ Dropdown-Multiple Choice
- ☑ Text Field
- ☑ Text Area

Preview Form   Clear

Previous   Next   Save   Cancel

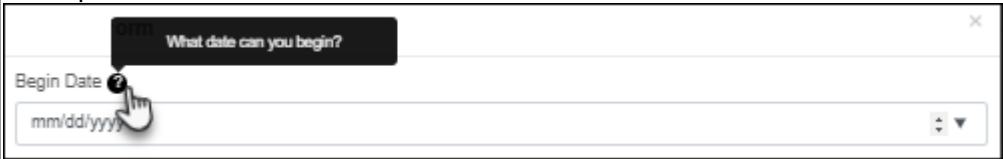
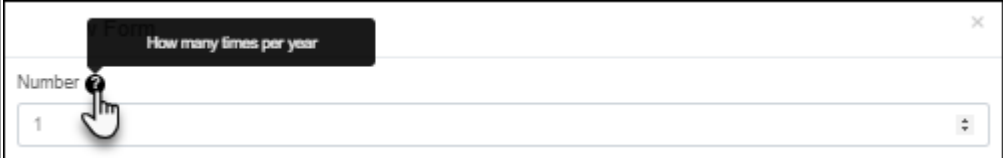
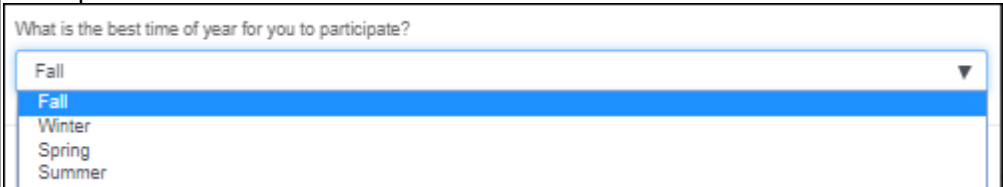
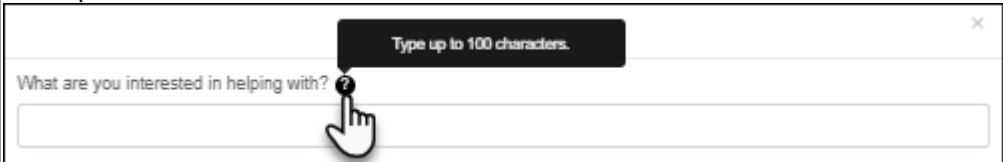
☐ You can add a variety of elements to your form.

- Drag the element from the right to the blank area in the middle.
- You can drag and drop the elements to re-position them within the form.
- Click **Preview Form** any time to see how the form will look to parents.

The following two options allow you to provide headings and instructions on the form.

|                  |                                                                                                                                                                                                                                     |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Header</b>    | <p>Select to add a heading, up to 50 characters.</p> <p>Example:</p> <div>PTA Participation Form</div>                                                                                                                              |
| <b>Paragraph</b> | <p>Select to provide one or more sentences in the form, such as instructions, up to 1000 characters.</p> <p>Example:</p> <div> PTA Participation Form<br/> Please complete this form by the end of the first week of school. </div> |

The following question format types refer to the answer you are soliciting from the parent.

|                                 |                                                                                                                                                                                                                                           |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Date Field</b>               | <p>The parent will be asked to type a date or select a date from a calendar widget.</p> <p>Example:</p>                                                 |
| <b>Number Field</b>             | <p>The parent will be asked to enter a number, such as a phone number, street number, or quantity.</p> <p>Example:</p>                                  |
| <b>Radio button</b>             | <p>The parent will be asked to select one of several options (multiple choice, one answer).</p> <p>Example:</p>                                        |
| <b>Dropdown-Multiple Choice</b> | <p>The parent will be asked to select an option from a drop-down list (one or multiple selections).</p> <p>Example:</p>                               |
| <b>Text Field</b>               | <p>The parent will be asked to enter a few words or less. You can specify the maximum number of characters the parent can enter.</p> <p>Example:</p>  |

|                  |                                                                                                                                                                                                                                                                            |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Text Area</b> | <p>The parent will be asked to enter a text response that may require more than a few words. You can specify the maximum number of characters the parent can enter.</p> <p>Example:</p>  |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

All question format types allow the following properties to be set:

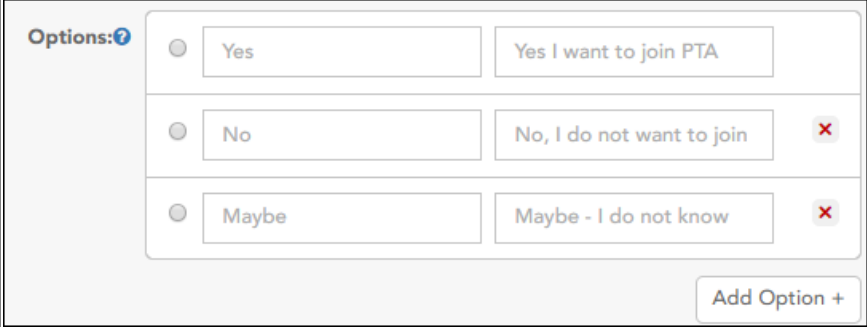
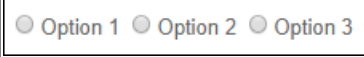
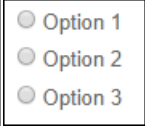
**NOTE:** For *Spanish* forms, provide this information in Spanish.

**TIP:** Be sure to add questions to the custom form that help identify the student that the information is being gathered for (e.g., What is your student's first name? What is your student's last name? Grade Level? What school does your child attend? (multiple choice)). The form results do not automatically provide default information such as first name, last name, grade level, campus.

|                         |                                                                                                                                                                                                                                                                                                  |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Required</b>         | Select if parents are required to answer this question.                                                                                                                                                                                                                                          |
| <b>Label</b>            | <p>Type the question as you want it to appear in ParentPortal.</p> <p><b>NOTE:</b> Labels should be different for each field on individual forms. This text is for internal use when viewing custom form data.</p>                                                                               |
| <b>Tool Tip</b>         | Type further instructions for the question if needed. This will be displayed when a parent hovers over a question mark icon  next to the field.                                                               |
| <b>Placeholder Text</b> | Type any text that you want to appear in the field, such as a sample answer or guidance. For example, in an email field, you may type <i>name@email.com</i> . The parent's actual answer will overwrite any placeholder text. For <b>Date Field</b> , the placeholder text is always mm/dd/yyyy. |

The following properties depend on the type of question format type selected:

**NOTE:** For *Spanish* forms, provide this information in Spanish.

| Property                            | Question Type(s)                       | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-------------------------------------|----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Size</b>                         | Header                                 | Select the font size for the header.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Description</b>                  | Paragraph                              | Type any instructions or information about the form.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Options</b>                      | Radio button, Dropdown-Multiple Choice | <p>Type each option the parent can choose from. There are two fields for each option:</p> <ul style="list-style-type: none"> <li>• In the left field, type the option as it should be displayed in ParentPortal.</li> <li>• In the right field, type the option the way you want it to appear in the response. Parents will not see this name; it is for internal use only. It is okay for these to be the same.</li> </ul> <ul style="list-style-type: none"> <li>• Click <b>Add Option +</b> to add as many options as needed.</li> <li>• Click  to remove an option.</li> </ul>  |
| <b>Allow Multiple Selections</b>    | Dropdown-Multiple Choice               | Indicate if the parent can choose more than one option.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Display Options Horizontally</b> | Radio button                           | <p>If selected, all options are displayed on the same row.</p>  <p>If not selected, each option is displayed on a separate row.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Default Value</b>                | Date Field                             | Indicate the default value. If entered, it will be displayed initially, rather than the Placeholder text. If the parent deletes the default value, the <b>Placeholder Text</b> is displayed.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Minimum/Maximum Number</b>       | Number Field                           | Specify a range of numbers that are allowed.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Minimum/Maximum Date</b>         | Date Field                             | Specify a range of dates that are allowed.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Maximum Characters</b>           | Text Field, Text Area                  | Indicate the maximum number of characters the parent can enter.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Number of Rows</b>               | Text Area                              | Specify how tall the text area is. The number of rows does not affect the number of characters the parent can enter.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Input Type</b>                   | Text Field, Text Area                  | Select the type of text you are asking the parent to enter.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

☐ You can further adjust the form. Hover over each question in the form:



- Click to remove the question from the form.



- Click to view/modify the properties of the question.

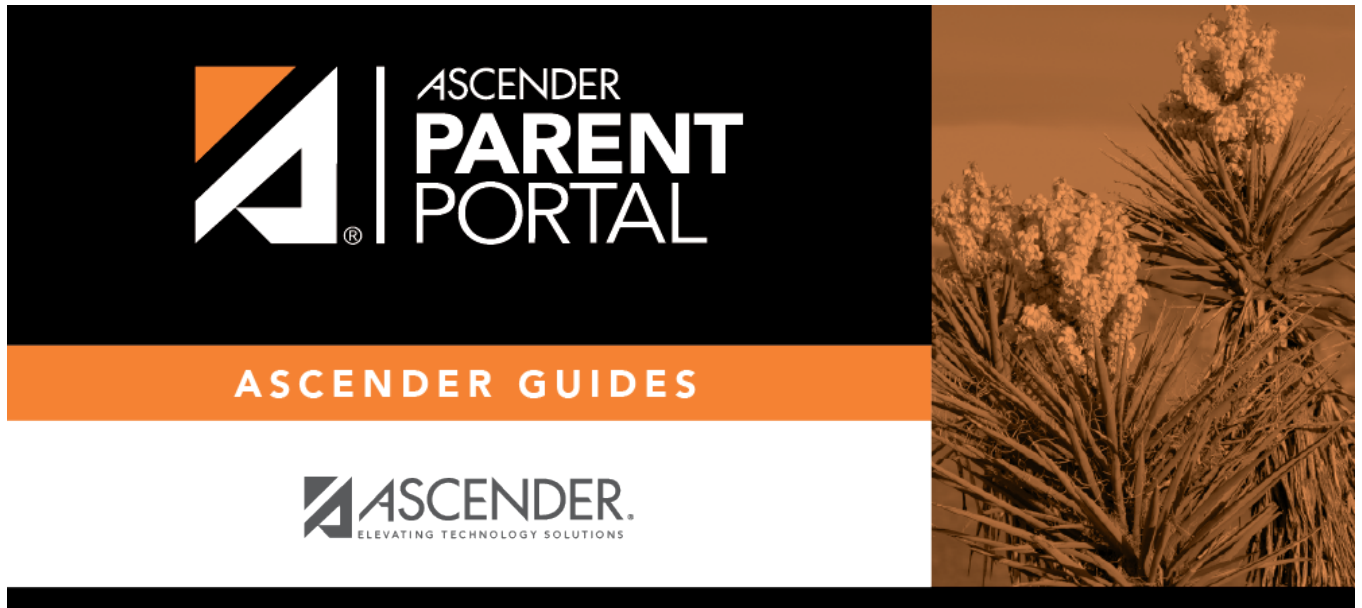
Click **Close** to collapse (i.e., hide) the properties for a particular question.



- Click to duplicate the question including its properties.

- ☐ Click **Clear** if you need to remove all questions from the form and start over.
- ☐ Click **Save**.
- ☐ Click **Previous** if you need to return to Step 1 to modify form properties.

**NOTE:** A custom form must be added to either the Returning Student Registration or Student Data Maintenance group (under **Form Group Management**) to be visible to parents. Custom forms are not available for use in New Student Enrollment.



## Back Cover