admin_forms_group

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ASCENDER ParentPortal Admin > Form Groups Management

This page allows you to create and edit form group headings so you can group related forms.

A form must be added to a group (or to the <u>Online Registration</u> template) in order to be accessible to parents.

Some groups are included automatically.

<SCREEN SHOT>

Groups fall into one of three categories:

- New Student Enrollment
- External (Public Documents)
- Student Data Editing

Group Name	Any existing groups are displayed, including those that are included automatically: Under **New Student Enrollment**: • The *New Student Enrollment Forms* group is included automatically and is used to provide any static and standard forms required for enrolling a new student in the district. Any static and/or standard forms added to this group will be displayed when a parent goes through the new student enrollment process online (Step 5). Under **External (Public Documents)**: • For forms in groups under this heading, the parent does not need to have a ParentPortal account or log on in order to access the forms. Only static document forms can be added to these groups. If at least one static document form has been added to an external group group, the parent can click the **Need Documents** link on the ParentPortal login page to access the documents. The *Enrollment* and *Calendars* groups are included by default. • These forms are only available when the **Allow parents access to Student Data forms** is set to Yes. Under **Student Data Editing**: • Initially, no groups are listed. Or, any groups created by the district prior to release 2.12 (Summer 2017) are listed. Any groups you add with the **Group Type** field set to *Student Data* will be listed here.
Form Count	The first number indicates the number of active forms in the group. The second number (in parentheses) indicates the number of archived forms in the group. Forms can be archived (or un-archived) on the Form Editor page.

Scroll down to view instructions for default groups, new groups, and existing groups.

NOTE: Standard forms must be added to a group in order for parents to see them in ParentPortal. You can create a new group for standard forms, or you can add them to an existing group.

Update a default group:

For groups that are included by default, you can only modify **Language Context** and **Special instructions** and add forms to the group. You cannot change the name of a default group.

- External groups only allow you to add static forms.

- The *New Student Enrollment Forms* group allows you to add static and standard forms.

Click the spyglass icon <SCREENSHOT> to edit a group.

<SCREENSHOT>

The group details are displayed on the left side of the page under **Form Group Detail** (left side).

Form Group Detail (left)	
Language Context	Select the language of the forms in the group.
Special instructions or information for this form grouping	Add or update any special instructions for the form group, such as clarification about which forms are included in the group. The instructions should be typed in the language selected in **Current Language Context**. If Spanish instructions are not provided, English instructions will be displayed even if the parent is viewing ParentPortal in Spanish.

Next to **Associated Forms**, click **Add** to add a form to a group. A grid is displayed allowing you to associate forms with the group.

<SCREENSHOT>

NOTE: The *Home Language Survey* standard form can only be added to the New Student Enrollment Forms group; it cannot be added to any other group.

Any archived forms in the group are highlighted in orange.

> **NOTE:** Standard forms generally do not need to be added to the Student Data Editing group.

Form Name	Select the form from the drop-down list. All available forms are listed in alphabetical order, including standard forms, which are automatically included.
Order	Type the number indicating the order in which you want the forms to be listed within the group. For example, type 1 if you want the form to be listed first in the group.
No Signature	Select if the form has no data input fields or the parent is not required to acknowledge or submit the form. This only applies to forms that are for information purposes only, such as a school supply list or calendar. When selected, the form will not have any buttons displayed to the parent in ParentPortal allowing him to submit or acknowledge the form. The form will simply be displayed to the parent as a read-only form. **NOTE:** • For *New Student Enrollment Forms*, the field is disabled. The field is blank by default and cannot be selected. • For External forms, the field is disabled. The field is selected by default and cannot be cleared.
Visible	Select to make the form visible to parents. If the field is not selected, the form will not be displayed in ParentPortal, even if it is associated with a group. This field can be used if you need to temporarily or quickly block access to the form, for example, if you need to make corrections to the content.
Required	Select to indicate to the parent that the form is required and the parent must either submit required data or acknowledge that he has reviewed the form. If selected: • If the form has data fields that must be input, the **Submit Data with Electronic Signature** button is displayed on the form in ParentPortal, and the parent will be required to enter data and submit the form. • If the form has no data fields but the parent must acknowledge that he has reviewed the form, the **Submit Electronic Signature** button is displayed on the form in ParentPortal, and the parent will be required to submit the form. **NOTE:** This field is set automatically for some form types: • For External and any other static forms, the field is disabled. The field is blank by default and cannot be selected. • For standard forms in *New Student Enrollment*, the field is disabled. The field is selected by default and cannot be cleared.

Click **Add** again to add another form.

> The **Add** button is disabled once there are no additional forms that can be added to a group.

To delete a form from a group, click <SCREENSHOT> under **Associated Forms**.

<SCREENSHOT>

The form is removed from the list, but it is not actually deleted from the list until you save. If you leave or select another group before saving, the form will remain in the group.

Click **Save**. The **Form Count** is updated to include the new form(s).

<SCREENSHOT>

Add a new group:

Form Group Detail (left)	
Click **Add New Group**. <SCREENSHOT> Any data in the fields is cleared allowing you to enter settings for the new group.	
Language Context	Select the language of the forms in the group.}
Group Type	Select one: • *Student Data* - The group will be added to the **Student Data Editing** category. This is the appropriate category for forms related to student data updates. A parent will need to be logged on to ParentPortal to have access to forms in this category. • *External (No login required)* - The group will be added to the **External (Public Documents)** category. This is the appropriate category for static forms that you want to provide to the public without requiring a login. On the ParentPortal Login page, the user can click the link under **Need Documents** to go to the Public Documents page where the forms can be downloaded.
Name	Type a name for the group. **NOTE:** The name *Registration* is used by an internal system group and cannot be used for a district's forms. Instead, enter a name such as *MISD Annual Registration Forms*.
Special instructions or information for this form grouping	Add or update any special instructions for the form group, such as clarification about which forms are included in the group. The instructions should be typed in the language selected in **Current Language Context**. If Spanish instructions are not provided, English instructions will be displayed even if the parent is viewing ParentPortal in Spanish.

Any existing forms for the group are listed. Otherwise, the message "No forms have been added" is displayed.

Next to **Associated Forms**, click **Add** to add a form to a group.

<SCREENSHOT>

A grid is displayed allowing you to associate forms with the group.

Any archived forms in the group are highlighted in orange.

Form Name	Select the form from the drop-down list. All available forms are listed in alphabetical order, including standard forms, which are automatically included.
Order	Type the number indicating the order in which you want the forms to be listed within the group. For example, type 1 if you want the form to be listed first in the group.
No Signature	Select if the form has no data input fields or the parent is not required to acknowledge or submit the form. This only applies to forms that are for information purposes only, such as a school supply list or calendar. When selected, the form will not have any buttons displayed to the parent in ParentPortal allowing him to submit or acknowledge the form. The form will simply be displayed to the parent as a read-only form. **NOTE:** For External forms, the field is disabled; it is selected by default and cannot be cleared.
Visible	Select to make the form visible to parents. If the field is not selected, the form will not be displayed in ParentPortal, even if it is associated with a group. This field can be used if you need to temporarily or quickly block access to the form, for example, if you need to make corrections to the content.
Required	Select to indicate to the parent that the form is required and the parent must either submit required data or acknowledge that he has reviewed the form. If selected: • If the form has data fields that must be input, the **Submit Data with Electronic Signature** button is displayed on the form in the parent portal, and the parent will be required to enter data and submit the form. • If the form has no data fields but the parent must acknowledge that he has reviewed the form, the **Submit Electronic Signature** button is displayed on the form in ParentPortal, and the parent will be required to submit the form. **NOTE:** This field is set automatically for some form types: • For External and any other static forms, the field is disabled. The field is blank by default and cannot be selected. • For standard forms, the field is disabled. The field is selected by default and cannot be cleared.

Click **Add** again to add another form.

The **Add** button is disabled once there are no additional forms that can be added to a group.

To delete a form from a group, click <SCREENSHOT> under **Associated Forms**.

<SCREENSHOT>

The form is removed from the list, but it is not actually deleted from the list until you save. If you leave or select another group before saving, the form will remain in the group.
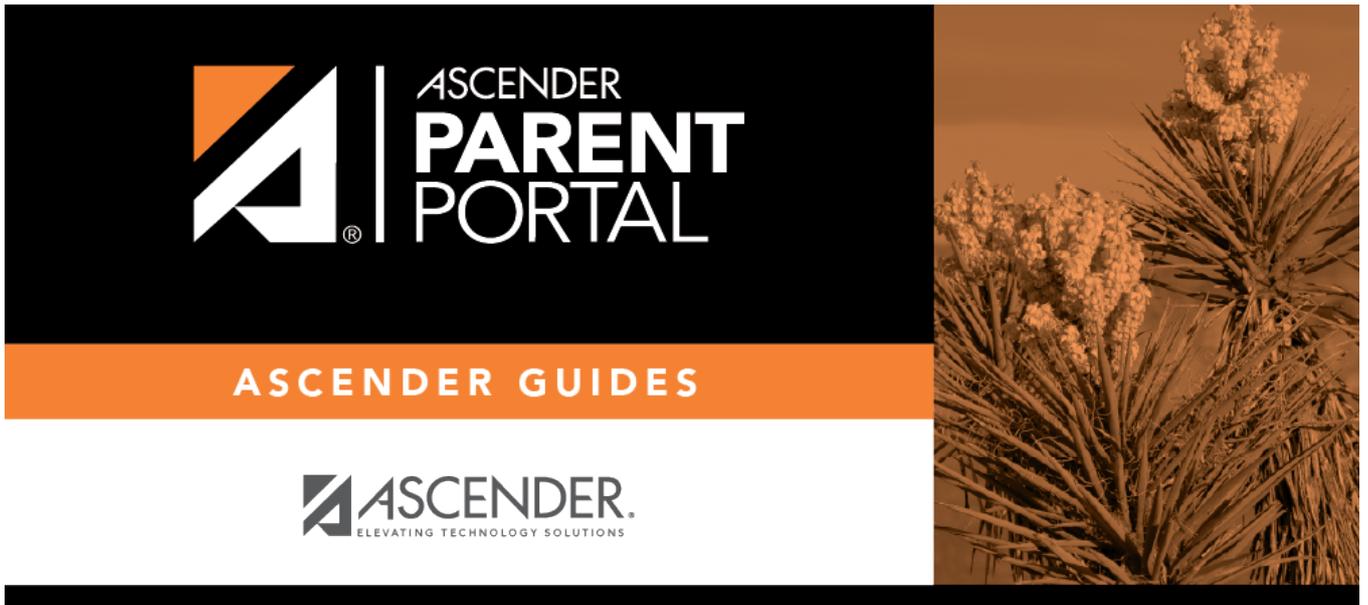
Click **Save**. The group is listed on the right under the heading indicated by the **Group Type** field.

<SCREENSHOT>

Click **Add New Group** to add another group. The data in the fields is cleared allowing you to enter another group. Unsaved data is lost.

Edit or delete an existing group:

| existing groups (right) | **Edit:**

To edit an existing group, click 🔍 under **Options**.

<SCREENSHOT>

The fields on the left side of the page display the data for the selected group.

1. Update data and forms as necessary.
2. Click **Save**.

Delete:

To delete an existing group, click <SCREENSHOT> under **Options**. You are prompted to confirm that you want to delete the group. Click **OK**.

<SCREENSHOT>
NOTE: You cannot delete a group that has forms associated with it (whether archived or not), or a group that is included by default. |

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