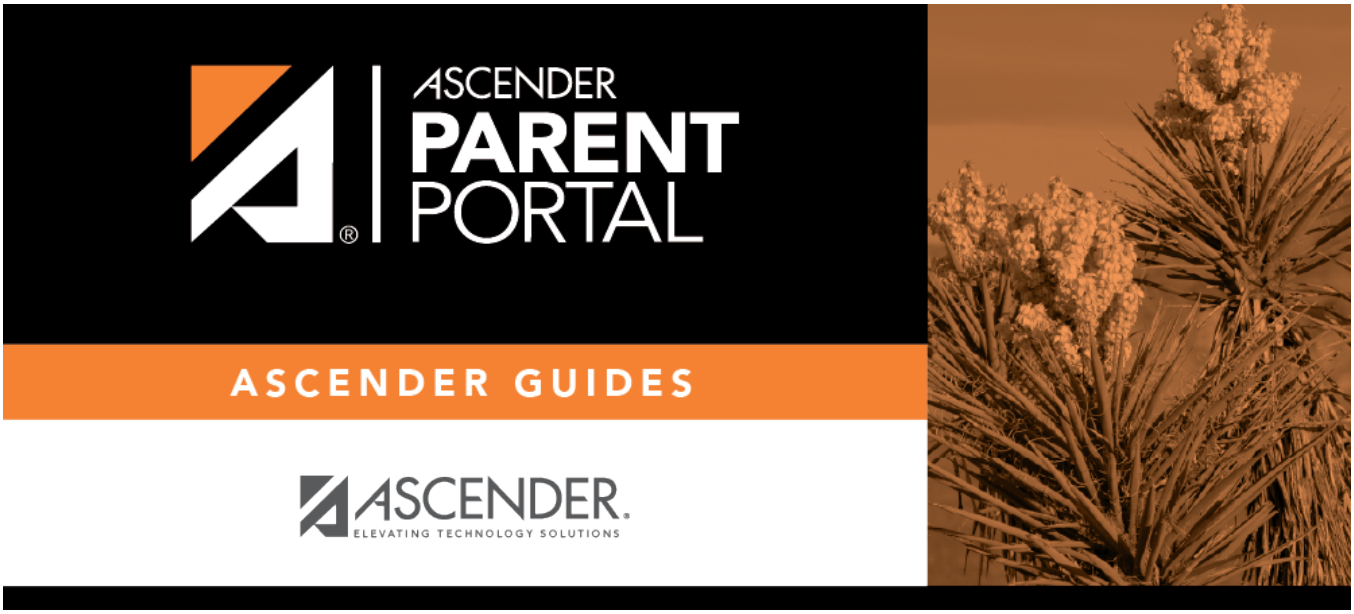


District: Set Up & Enable Forms

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ParentPortal Admin: Enrollment, Registration, and Data Updates

District: Set Up & Enable Forms

Districts should follow these steps to manage forms for New Student Enrollment, Returning Student Registration, and Student Data Maintenance, including static printable forms, customized dynamic forms, and standard forms.

Prerequisites:

- Be sure you have considered and completed all steps in the Overview & Before You Begin list.
- You must have district-level administrative access to ASCENDER ParentPortal.
- Any static forms must be ready for upload and saved in a valid format (English and Spanish versions). All forms should be ADA compliant.

1. Upload static documents.

   ASCENDER ParentPortal Admin > Form Management > Document Upload

   This page allows you to maintain a pool of read-only static documents that once created into a static form and then added to a form group, parents can view and print as needed. These documents cannot be updated by parents online; they can be viewed, printed, completed by hand (if necessary), and returned to the campus, such as campus and district calendars, school supply lists, acknowledgement forms, or surveys. The documents may vary by district and campus.

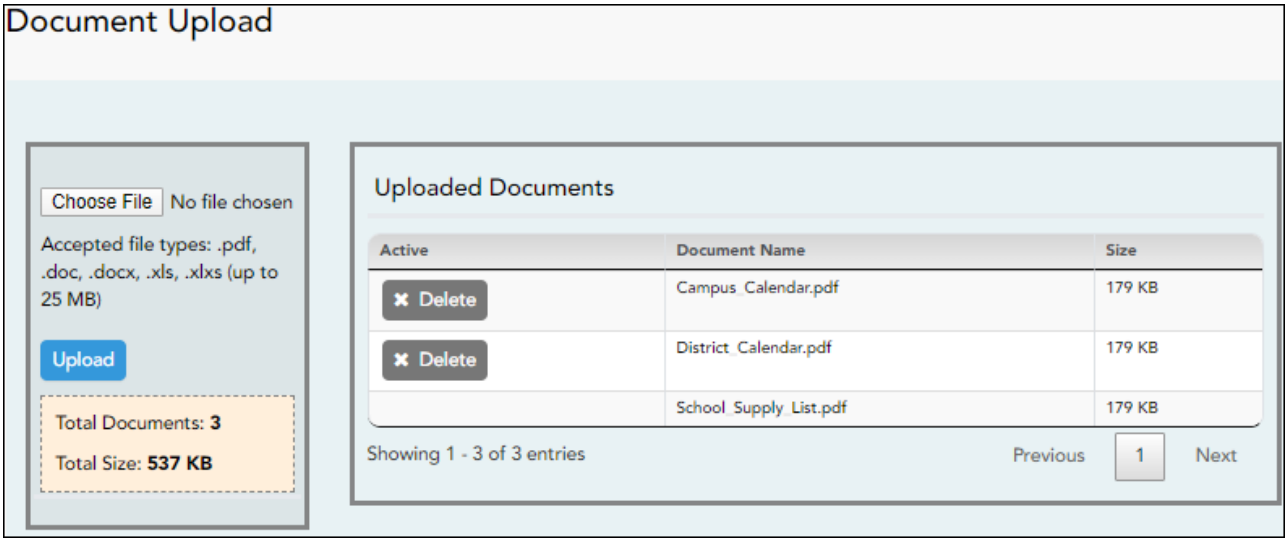
   From this page, you can upload static documents from your PC to the ParentPortal server. Once created into a static form and then added to a form group, parents will be able to access these forms from ParentPortal for online enrollment, annual online registration, and for ongoing student data maintenance.

   Your documents should be ADA compliant.

   You can upload documents in the following formats:

   - .doc or .docx (Microsoft Word)
   - .pdf (Adobe Acrobat)
   - .xls or .xlsx (Microsoft Excel)

- On this page, you will only upload the documents. You will create a form for each document in a subsequent step using the ***Form Creator*** page.
- If you will be creating English and Spanish versions of static forms, you must upload an English and Spanish version of each document.



Upload a document:

❑ Click **Choose File**.

Locate and select the form you want to upload. The file name is displayed.

❑ Click **Upload** to upload the selected file to the ParentPortal server.

Uploaded Documents (right)	Once uploaded, the file name and file size are displayed.

❑ Upload additional files as needed.

They are listed alphabetically.

Below the **Upload** button, statistical information is displayed indicating the total number of documents uploaded and the total file size for all uploaded documents.

Delete a document:

❑ Under **Uploaded Documents**, click **Delete** for the document you want to delete.

NOTE: You cannot delete a document if it is in use (i.e., added to a form).

2. Edit student data fields.

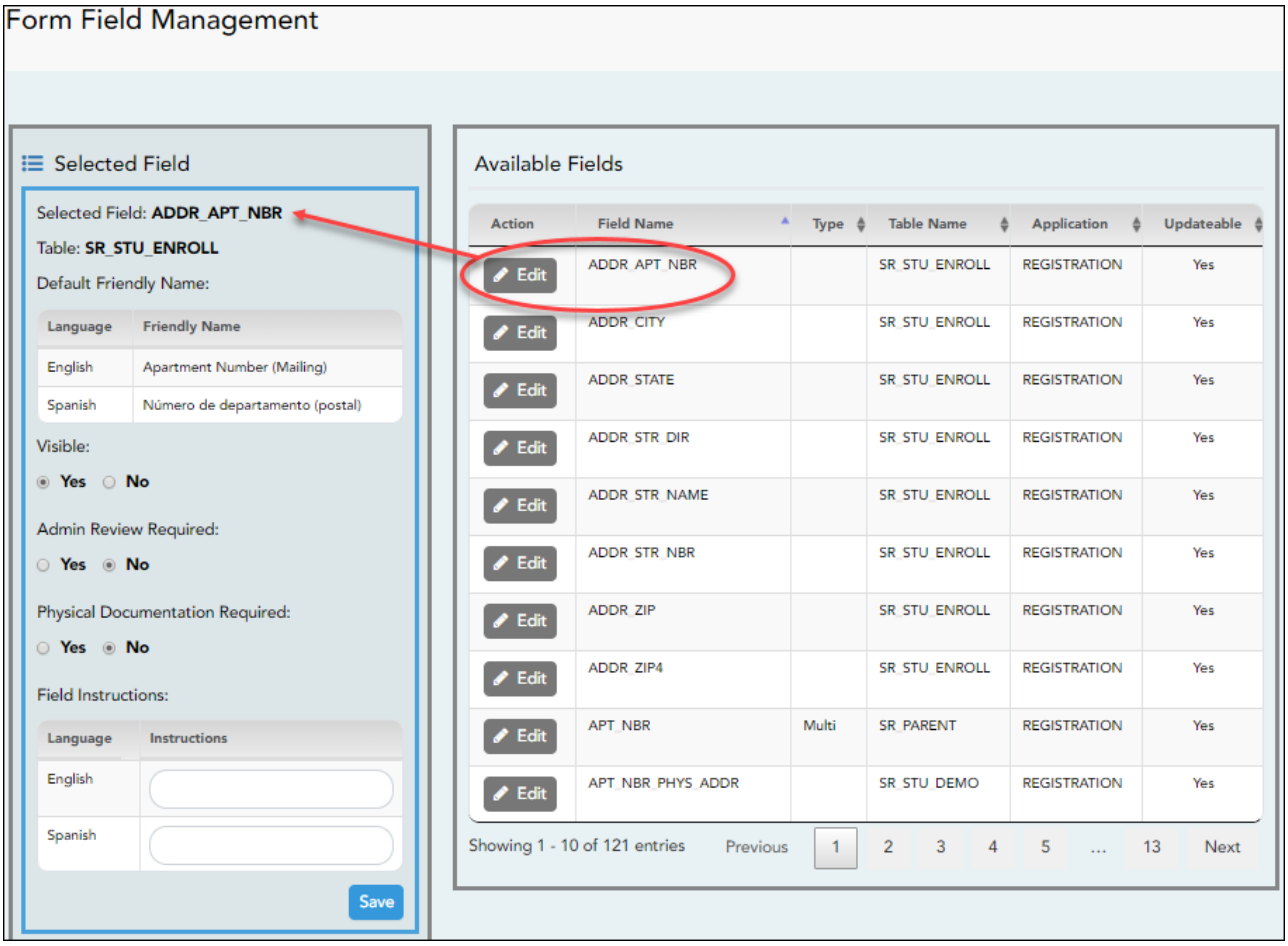
ASCENDER ParentPortal Admin > Form Management > Form Field Management

This page allows you to set options for the fields that will be used for New Student Enrollment, Returning Student Registration, and Student Data Maintenance forms. Examples of fields are first name, last name, middle name, and birth date.

The list of **Available Fields** is added automatically. For each field, you indicate if the field is visible and add any instructions. By default, all fields are visible and no action is required; however you can hide a field globally and/or add default instructions as needed.

Some districts allow you to select document storage (DOCSTOR_) fields which allow parents to upload supporting registration forms (immunization record, birth certificate, etc.).

NOTE: On this page you will set options for the fields. You will add the fields to a form in a subsequent step.



Available Fields:

NOTES:

- Default friendly names are initially provided in the program, but they can be changed by administrators as needed. This list reflects the names initially provided.
- The following fields are required: **Contact: Last Name**, **Contact: First Name**, and **Contact: Relation**.
- Field names that begin with DOCSTOR_ can be added to a form to allow parents to upload these documents. If the ParentPortal-provided standard forms are used in your district, it may not be necessary to use DOCSTOR_ fields for these particular forms.
- Field names that begin with MOCK_ are reserved for New Student Enrollment forms (special programs) and cannot be selected for any other dynamic forms.

Field Name	Default Friendly Name - English	Default Friendly Name - Spanish
ADDR_APT_NBR	Apartment Number (Mailing)	Número de departamento (postal)
ADDR_CITY	City (Mailing)	Ciudad (postal)
ADDR_STATE	State (Mailing)	Estado (postal)
ADDR_STR_DIR	Street Direction (Mailing)	Calle y número (postal)

Field Name	Default Friendly Name - English	Default Friendly Name - Spanish
ADDR_STR_NAME	Street Name (Mailing)	Nombre de la calle (postal)
ADDR_STR_NBR	Street Number (Mailing)	Número(postal)
ADDR_ZIP	Zip (Mailing)	Código postal (postal)
ADDR_ZIP4	Zip4 (Mailing)	Código postal4 (postal)
APT_NBR	Contact: Apartment Number	Contacto: Número de departamento
APT_NBR_PHYS_ADDR	Apartment Number (Physical)	Número de departamento (físico)
CAMPUS_CD_PRV	Previous Campus	Campus anterior
CELL_PHONE	Contact: Cell Phone	Contacto: Teléfono celular
CITY	Contact: City	Contacto: Ciudad
CITY_NAME_PHYS_ADDR	City (Physical)	Ciudad (física)
DL_NBR	Contact: Driver License Number	Contacto: Número de licencia de conducir
DL_ST	Contact: Driver License State	Contacto: Estado de licencia de conducir
DOB (SR_PARENT)	Contact: Date of Birth	Contacto: Fecha de nacimiento
DOB (SR_STU_DEMO)	Date of Birth	Fecha de nacimiento
DOCSTOR_ACCEPTABLEUSEPOLICY	Student Acceptable Use Policy	Política de uso aceptable para estudiantes
DOCSTOR_BC	Birth Certificate Document	Documento de certificado de nacimiento
DOCSTOR_CAPP	Chemical Abuse Participation Form	Formulario de participación en abuso de sustancias
DOCSTOR_DIRECTORY	Directory Form	Formulario del directorio
DOCSTOR_DISTRICTHANDBOOK	District Handbook	Manual del distrito
DOCSTOR_DL	Driver License Document	Documento de licencia de conducir
DOCSTOR_EMP_SURVEY	Employee Survey Form	Formulario de encuesta para empleados
DOCSTOR_ETHRACEQUESTIONNAIRE	Ethnicity and Race Data Questionnaire	Cuestionario de datos de origen étnico y raza
DOCSTOR_FAMILYSURVEY	Family Survey	Encuesta familiar
DOCSTOR_FOODALERGY*	Food and Allergy Form	Formulario de alimentos y alergias
DOCSTOR_FREELUNCH	Free Lunch (NSLP)	Almuerzo gratis (NSLP)
DOCSTOR_HISTSCHOOLATTENDANCE	History of School Attendance	Historial de asistencia escolar
DOCSTOR_HOMELANGSURVEY	Home Language Survey	Encuesta sobre idioma del hogar
DOCSTOR_IDENTITYVERIF	Identity Verification	Verificación de identidad
DOCSTOR_IMM*	Immunizations Document	Documento de inmunizaciones
DOCSTOR_MCVINTO	McKinney-Vento Form	Formulario McKinney-Vento

Field Name	Default Friendly Name - English	Default Friendly Name - Spanish
DOCSTOR_MILCONNECTEDSTUDATA	Military Connected Student Data	Datos de alumnos con conexiones militares
DOCSTOR_POR	Proof of Residency Document	Documento de comprobante de residencia
DOCSTOR_REGISTRATIONPACKET	Registration Packet	Paquete de registro
DOCSTOR_RELEASEOFINFO	Release of Information	Divulgación de información
DOCSTOR_SSC	Social Security Card	Tarjeta de seguro Social
DOCSTOR_STATEMENTSPECED	Statement of Special Education Services	Declaración de servicios de educación especial
DOCSTOR_STUDENTMEDIARELEASE	Student Media Release	Divulgación de información del alumno a medios de comunicación
EMAIL (SR_PARENT)	Contact: Email	Contacto: Correo electrónico
EMAIL (SR_STU_DEMO)	Student Email Address	Dirección de correo electrónico del estudiante
EMERGENCY_FLAG	Contact: Emergency Contact	Contacto: Contacto de emergencia
ETHN_HISPANIC	Hispanic/Latino	
FOOD_ALLERGY	Food Allergy	Food Allergy
GEN	Contact: Generation	Contacto: Generación
HOME_LANG_CD	Pri Language Spoken at Home	
LANG_CD	Contact: Language	Contacto: Idioma
LANG_PRI	Pri Language Spoken by Student	
MIGRANT_FLAG	Contact: Migrant	Contacto: Migrante
MIL_BRANCH	Contact: Branch of Service	Contacto: Rama del servicio
MIL_IND	Military Connection	
MIL_RANK	Contact: Rank	Contacto: Rango
MOCK_FOSTER_CARE	Foster care	Cuidado tutelar
MOCK_HOMELESS	Is student homeless?	¿Es un estudiante sin hogar?
MOCK_LAST_YEAR_GRADE	Last year's grade	Grado del año pasado
MOCK_PREV_IN_504	504 Program	Programa 504
MOCK_PREV_IN_ALT_PROG	Alternative Program	Programa alternativo
MOCK_PREV_IN_ARMED_FORCES	Family members serving our country	Miembros de la familia que sirven a nuestro país
MOCK_PREV_IN_BIL_ESL	Bilingual/ESL	Bilingüe/ESL
MOCK_PREV_IN_DAEP_JJAEP	DAEP/JJAEP	DAEP/JJAEP
MOCK_PREV_IN_DYSLEXIA	Dyslexia	Dislexia
MOCK_PREV_IN_GT	Was student previously in GT?	¿El estudiante estuvo antes en GT?
MOCK_PREV_IN_IMMIGRANT	Immigrant Program	Programa para inmigrantes
MOCK_PREV_IN_MIGRANT	Migrant Program	Programa para migrantes
MOCK_PREV_IN_OTHER_PROG	Other Programs	Otros programas
MOCK_PREV_IN_SOCIAL_SERVICES	Social Services	Servicios sociales

Field Name	Default Friendly Name - English	Default Friendly Name - Spanish
MOCK_PREV_IN_SPECIAL_ED	Special Education	Educación especial
MOCK_PREV_IN_SPECIAL_ED_TYPE	If yes, which one?	En caso afirmativo
MOCK_PRIOR_RETENTION	Prior student retention?	
NAME_F (SR_STU_ENROLL)	First Name	Nombre
NAME_F (SR_PARENT)	Contact: First Name	Contacto: Nombre
NAME_GEN_CD	Generation	Generacion
NAME_L (SR_STU_ENROLL)	Last Name	Apellido
NAME_L (SR_PARENT)	Contact: Last Name	Contacto: Apellido
NAME_M (SR_STU_ENROLL)	Middle Name	Segundo nombre
NAME_M (SR_PARENT)	Contact: Middle Name	Contacto: Segundo nombre
NAME_STU_GOES_BY	Nickname	Apodo
OCCUPATION	Contact: Occupation	Contacto: Ocupación
OTHER_PHONE_AC	Contact: Other Phone Area Code	Contacto: Código de área de otro teléfono
OTHER_PHONE_EXT	Contact: Other Phone Extension	Contacto: Extensión de otro teléfono
OTHER_PHONE_NBR	Contact: Other Phone	Contacto: Otro teléfono
PAR_NAME	Parent Name	Nombre del padre/madre
PHONE_AREA_CD	Contact: Area Code	Contacto: Código de área
PHONE_AREA_CD_BUS	Contact: Business Area Code	Contacto: Código de área del negocio
PHONE_EXT_BUS	Contact: Business Phone Extension	Contacto: Extensión del teléfono del negocio
PHONE_NBR (SR_STU_DEMO)	Student Phone	Teléfono del estudiante
PHONE_NBR (SR_PARENT)	Contact: Phone	Contacto: Teléfono
PHONE_NBR_BUS	Contact: Business Phone	Contacto: Teléfono del negocio
PHONE_PREF	Contact: Phone Preference	Contacto: Preferencia telefónica
PHYS_ADDR_STATE	State (Physical)	Estado (físico)
PREV_DIST	Previous District	Distrito anterior
PRI_PHONE	Primary Phone	Teléfono principal
PRIMARY_FLAG	Contact: Guardian	Contacto: Tutor
PRIORITY	Contact: Priority	Contacto: Prioridad
RACE_AMER_INDIAN	American Indian/Alaskan Native	Indio americano/Nativo de Alaska
RACE_ASIAN	Asian	Asiático
RACE_BLACK	Black/African American	Negro/Afroamericano
RACE_PACIFIC_ISL	Hawaiian/Pacific Islander	Hawaiiano/Islas del Pacífico
RACE_WHITE	White	Blanco
RCV_MAILOUTS	Contact: Receive Mailouts	Contacto: Recibir comunicaciones por correo
RELAT	Contact: Relation	Contacto: Relación
SCH_YR	Contact: School Year	Contacto: Año escolar

Field Name	Default Friendly Name - English	Default Friendly Name - Spanish
SCND_PHONE	Secondary Phone	
SEQ_NO	Contact: Sequence Number	Contacto: Número consecutivo
SEX	Sex	Sexo
SSN	Contact: SSN	Contacto: NSS
STATE_CD	Contact: State	Contacto: Estado
STATE_STU_ID		
STR_DRCTN_PHYS	Street Direction (Physical)	Calle y número (física)
STR_NAME	Contact: Street Name	Contacto: Calle
STR_NAME_PHYS	Street Name (Physical)	Nombre de la calle (física)
STR_NBR	Contact: Street Number	Contacto: Número
STR_NBR_PHYS	Street Number (Physical)	Número (físico)
STU_CELL_PH	Student Cell Phone	Teléfono celular del estudiante
STU_ID	Student ID	Identificación del estudiante
STU_PHONE_AC	Student Area Code	Código de área del estudiante
TRANSPORT_IND	Contact: Right to Transport	Contacto: Derecho a transportar
VEH_COLOR	Contact: Vehicle Color	Contacto: Color del vehículo
VEH_LIC	Contact: Vehicle License Plate Number	Contacto: Número de placas del vehículo
VEH_LIC_ST	Contact: Vehicle License State	Contacto: Estado de registro del vehículo
VEH_MDL	Contact: Vehicle Model	Contacto: Modelo de vehículo
VEH_MK	Contact: Vehicle Make	Contacto: Marca del vehículo
ZIP	Contact: Zip	Contacto: Código postal
ZIP_CODE_PHYS_ADDR	Zip (Physical)	Código postal (físico)
ZIP4	Contact: Zip4	Contacto: Código postal4
ZIP4_PHYS_ADDR	Zip4 (Physical)	Código Postal4 (físico)

❑ Under **Available Fields** (right):

A list of all available fields is displayed.

The list includes the database field name, database table name, and the application with which the field is associated (such as Registration).

Type	This field indicates if the field is from a vertical table. • blank = a single record for the student, such as a birth date (i.e., not a vertical table). • Multi = multiple records for the student, such as multiple contact records. For example, the demo contact table has a sequence identifier for each person entered. • sequence number = a hard-coded sequence resulting in a static number of multiple-records. If there are two contacts entered, they would have sequence numbers of 01 and 02.
Updateable	This field indicates if the data in the field can be updated by a parent. This is set automatically and cannot be changed.

❑ Click **Edit** to edit settings for a particular field.

The **Selected Field** section is displayed on the left side of the page.

❑ Under **Selected Field** (left), modify information for the selected field as needed.

Selected Field	The database name for the selected field is displayed. For a field in a vertical table, an asterisk or a sequence number is displayed in parentheses next to the field name.
Table	The database name for the table in which the selected field exists is displayed.
Default Friendly Name	A friendly name for the selected field is displayed as it will appear on the form in both English and Spanish. For example, if the database field name is DOB, the friendly name might be *Date of Birth* (English) and *Fecha de nacimiento* (Spanish). The friendly name is set automatically and cannot be changed from this page; however, you can modify the friendly name when you add it to a form in a subsequent step. **Language Friendly Name:** Friendly field names are automatically provided for both languages.
Visible	Yes - Allow the field to be displayed for the parent on a form in ParentPortal. No - The field will not be displayed on any forms for parents to see. If No, this setting overrides all other visibility settings.
Admin Review Required	This field is not in use at this time. Whether you select Yes or No, all changes submitted by a parent must be reviewed by an administrator before they can be reviewed.
Physical Documentation Required	This field is not in use at this time.

Field Instructions	Type any special instructions for the parent that are specific to the field, up to 255 characters. **Language:** **Instructions:** Any instructions should be provided in both English and Spanish. **NOTE:** If Spanish instructions are not provided, English instructions will be displayed even if the parent is viewing ParentPortal in Spanish.

❑ Click **Save**.

❑ Repeat for each field that will be used in a form.

3. Create a form.

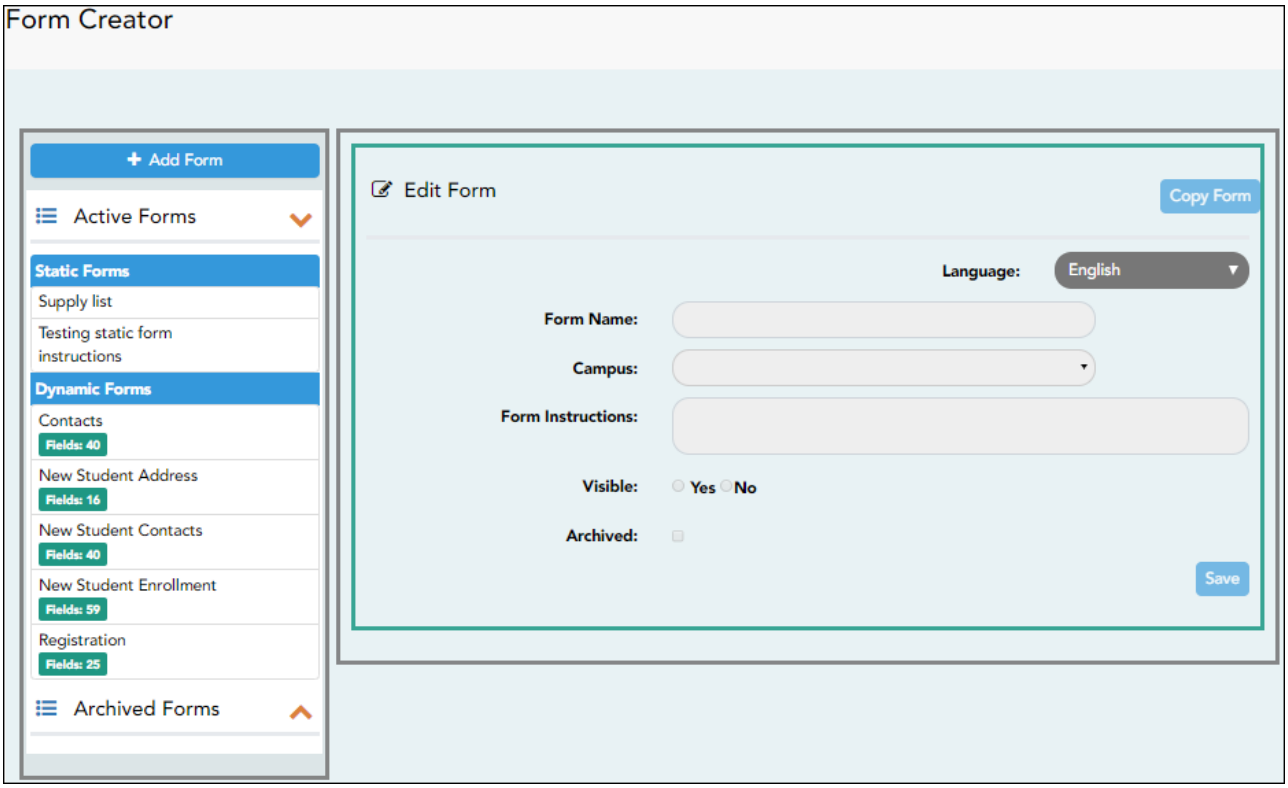
ASCENDER ParentPortal Admin > Form Management > Form Creator

The Form Creator allows you to create new forms, as well as delete and edit existing forms.

Two types of forms can be created:

- **Static forms** can be created using the static documents you have already uploaded.
- **Dynamic forms** can be created using the fields you selected in previous steps.

NOTE: A form must be added to a group in order to be accessible to parents. You will add the form to a group in a subsequent step.



On the left side of the page, any existing forms are listed.

- **Active Forms** are listed first, and **Archived Forms** are listed below active forms.

  - Click to hide **Active Forms** or **Archived Forms**.
  - Click to re-display **Active Forms** or **Archived Forms**.

- Forms are automatically grouped by form type (**Static** first, then **Dynamic**).

  Forms that have an uploaded document attached are listed under **Static**.
  Forms that do not have an uploaded document attached are listed under **Dynamic**.

- Under **Active Forms - Dynamic**, three 'New Student' forms are included by default:

  • New Student Enrollment
  • New Student Contacts
  • New Student Address

  The following forms are also included by default:
  • Contacts
  • Registration

- **Fields: #** indicates the number of fields that have been added to a dynamic form. Static forms do not have fields.

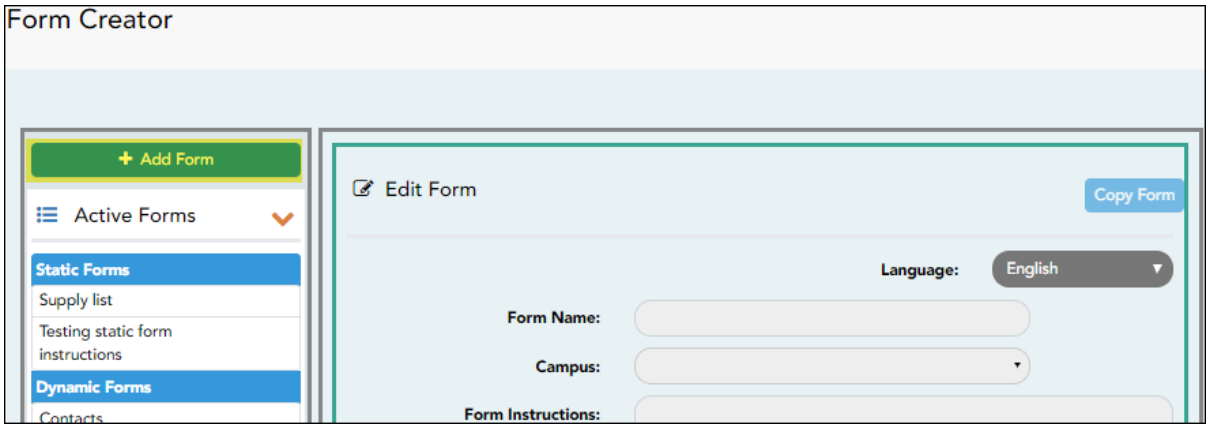
- Hover over the form and click the preview icon to preview the form.

  The form opens in a pop-up window or different tab allowing you to view the form as it will be displayed to parents in ParentPortal. In the preview window, data cannot be edited or saved.

Create a new form:

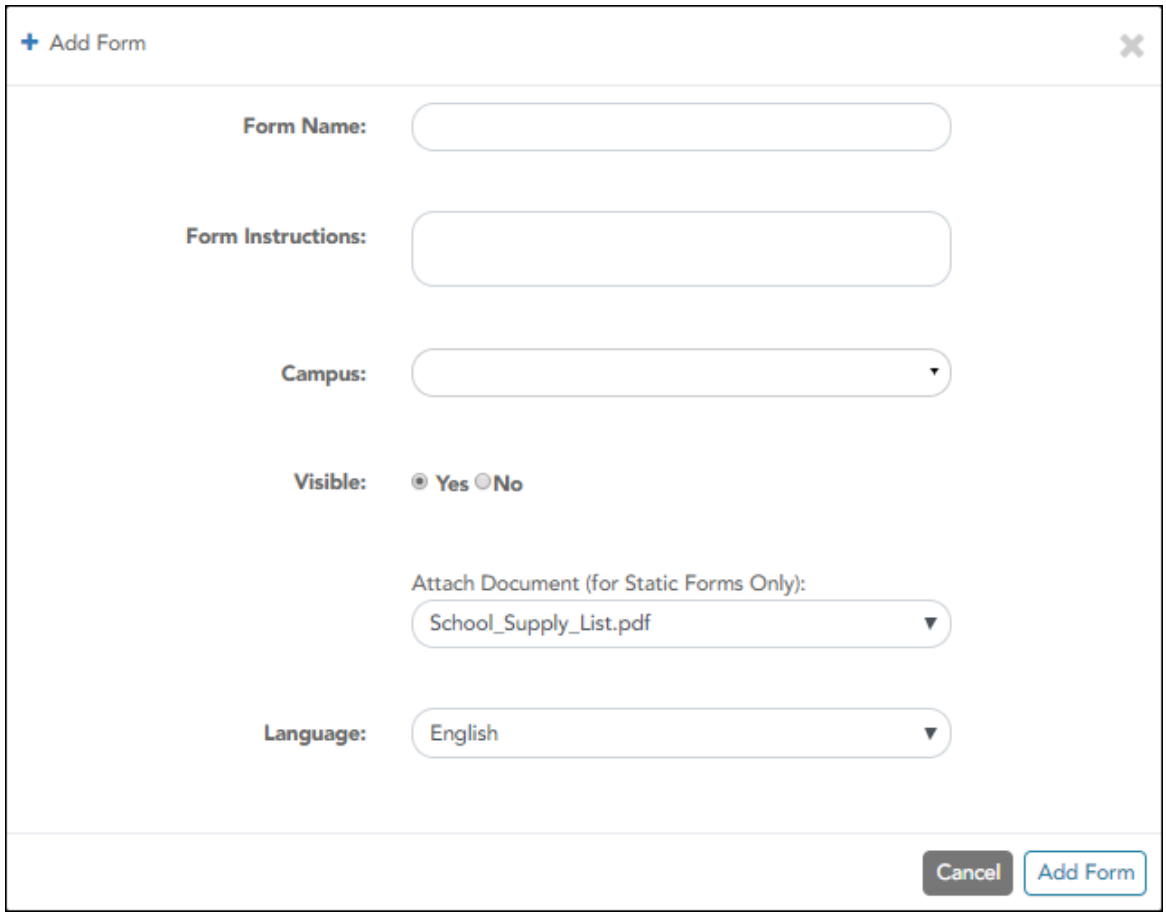
1. Create a static form using an uploaded document.

> If you uploaded any documents on Document Upload, you must create a form with each document in order to make it accessible to parents. If you have English and Spanish versions of documents, you must upload each document individually.



❑ Click **Add Form**.

A pop-up window opens.



Form Name	Type a name for the form. For a Spanish form, provide the name in Spanish.
Form Instructions	Type any specific district-level instructions for the form. For a Spanish form, provide the instructions in Spanish.
Campus	Select a campus in order to assign the form to a specific campus. Or, select *All Campuses* if the form is used for all campuses in the district. If you select *All Campuses*, each campus is listed, and you can remove individual campuses if needed.  **NOTE:** If you select *All Campus* by mistake, click *Cancel All* to clear all campuses at once.
Visible	Select **Yes** if you want the form to visible to parents in ParentPortal.
Attach Document	Select the form from the list in the drop-down field. For a Spanish form, be sure to select the Spanish version of the form.
Language	Select the language of the form.

❑ Click **Add Form**.

The form is added to the **Active Forms** list on the left side of the page, under **Static Forms**.

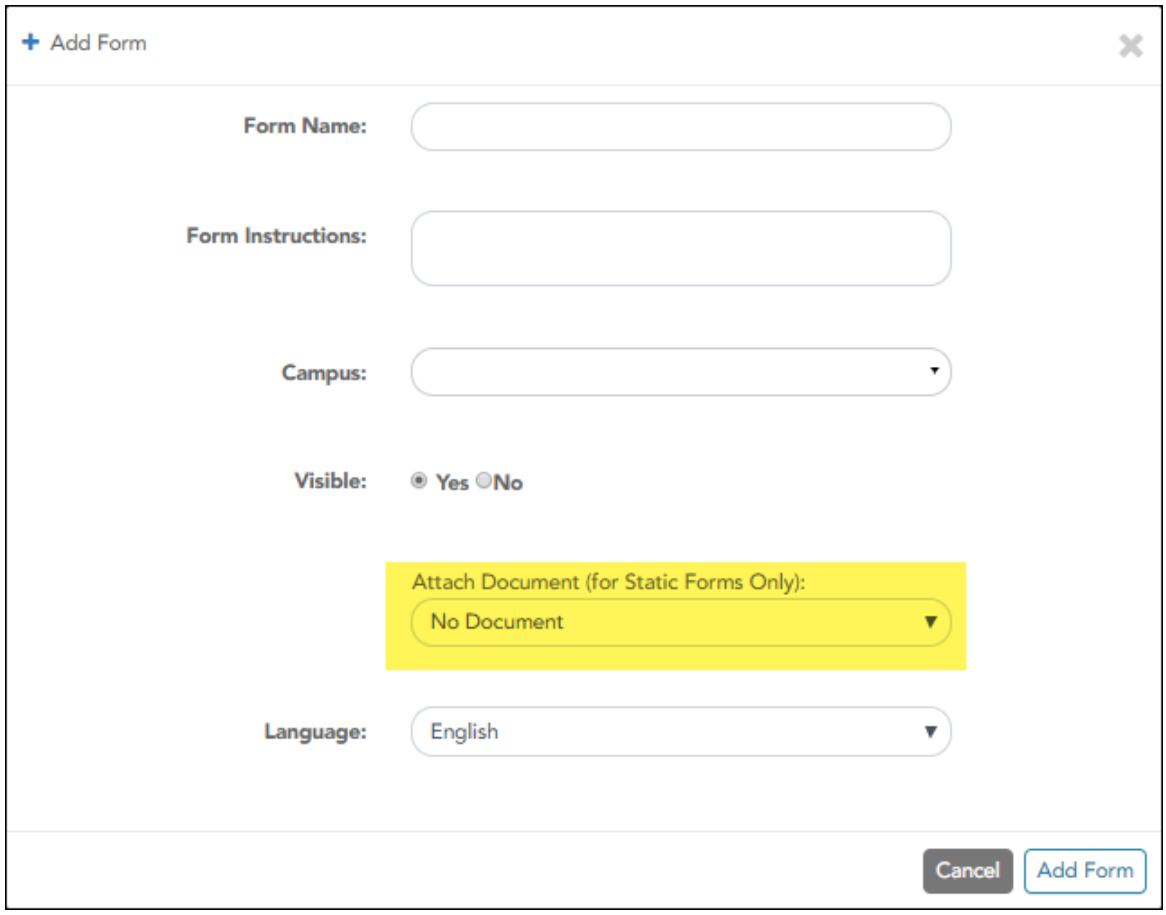
❑ Repeat for all remaining static documents, including Spanish documents.

2. Create/edit a dynamic form using data fields.

Dynamic forms are built using the fields from Forms Field Management.

❑ Click **Add Form**.

A pop-up window opens.



Form Name	Type a name for the form. For a Spanish form, provide the name in Spanish. At this time, user's may alter an existing Dynamic Form's **Form Name** field by following these steps: Select the Dynamic Form to modify. Click **Copy Form**. Then modify the **Form Name** field of the copied Dynamic Form. **This will be corrected with future programming.**

Form Instructions	Type any specific district-level instructions for the form. For a Spanish form, provide the instructions in Spanish.
Campus	Select a campus in order to assign the form to a specific campus. Or, select *All Campus* if the form is used for all campuses in the district. If you select *All Campus*, each campus is listed, and you can remove individual campuses if needed.  **NOTE:** If you select *All Campus* by mistake, click *Cancel all* to clear all campuses at once.
Visible	Select **Yes** if you want the form to visible to parents in ParentPortal.
Language	Select the language of the form.

IMPORTANT: For a dynamic form, leave the drop-down field set to *No Document*.

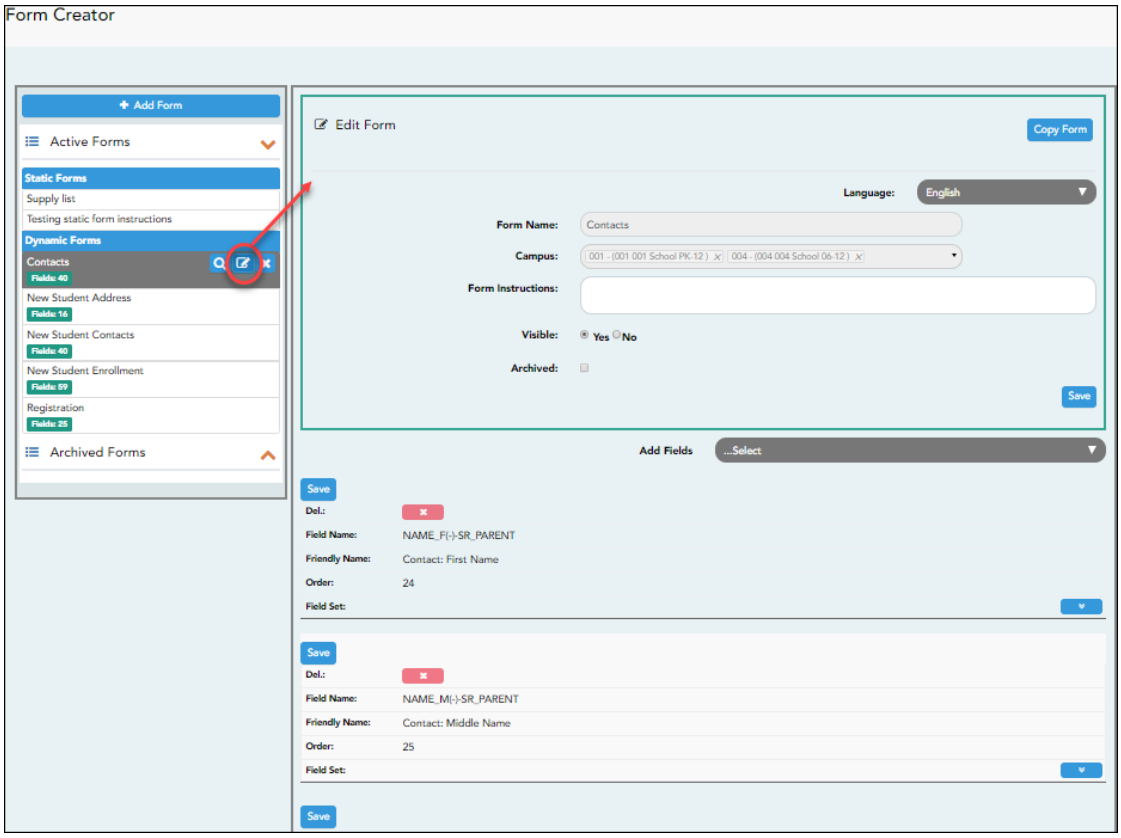
❑ Click **Add Form**.

The form is added to the **Active Forms** list on the left side of the page, under **Dynamic Forms**.

❑ Under **Active Forms**:

 - Hover over the new or existing dynamic form and click the edit icon.

The form details open in the **Edit Form** section (right side) where you can add or edit details:



Form Name	The name entered on the previous page is displayed and can be modified. Type a name for the form. For a Spanish form, provide the name in Spanish.
Form Instructions	The instructions entered on the previous page are displayed and can be modified. Type any specific district-level instructions for the form. For a Spanish form, provide the instructions in Spanish.
Campus	The campus(es) selected on the previous page are displayed and can be modified. Select *All Campus* if the form is used for all campuses in the district. If you select *All Campus*, each campus is listed, and you can remove individual campuses if needed.  **NOTE:** If you select *All Campus* by mistake, click *Cancel all* to clear all campuses at once.
Visible	The setting entered on the previous page is displayed and can be modified. Select **Yes** if you want the form to visible to parents in ParentPortal.
Archived	Select to archive the form, which allows you to retain forms that may still be needed for reporting purposes but are no longer used for data collection. An archived form is still accessible to administrators, but is grouped with other archived forms for organizational purposes. Archived forms are not visible in ParentPortal. *New Student Enrollment* forms cannot be archived.

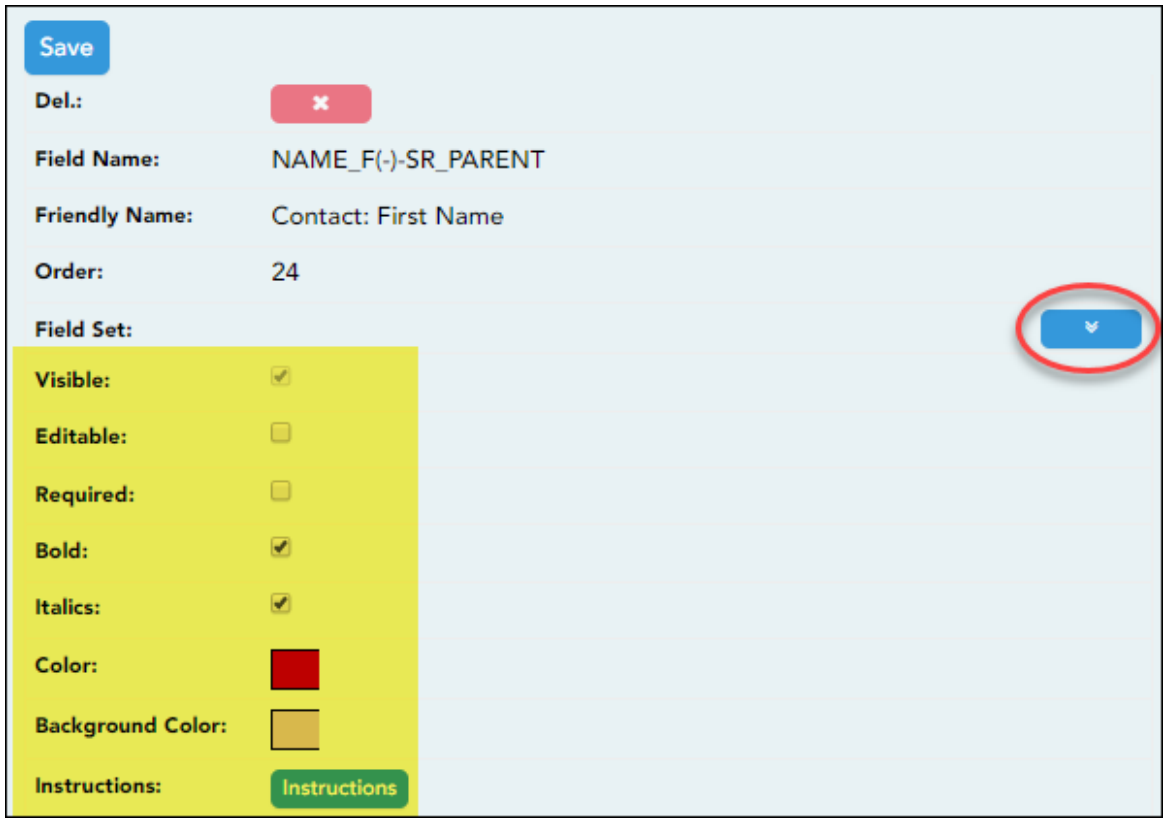
❑ Click **Save**.

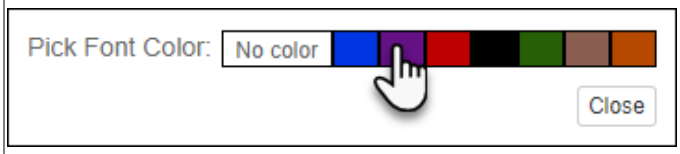
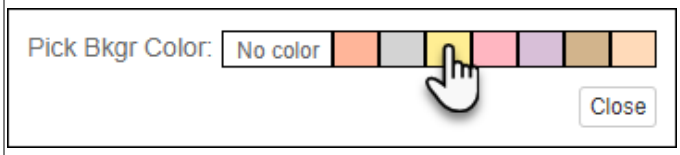
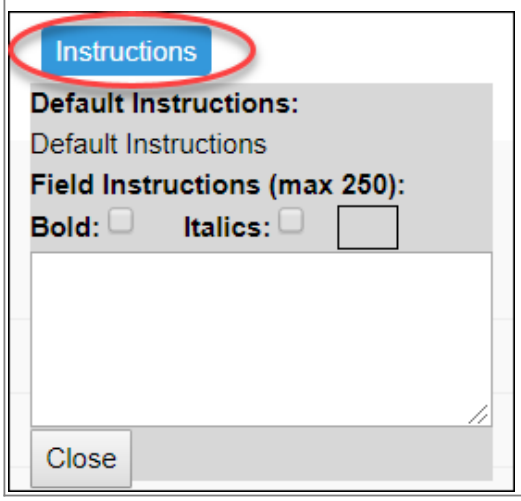
❑ Select the fields to include on the form from the drop-down list:

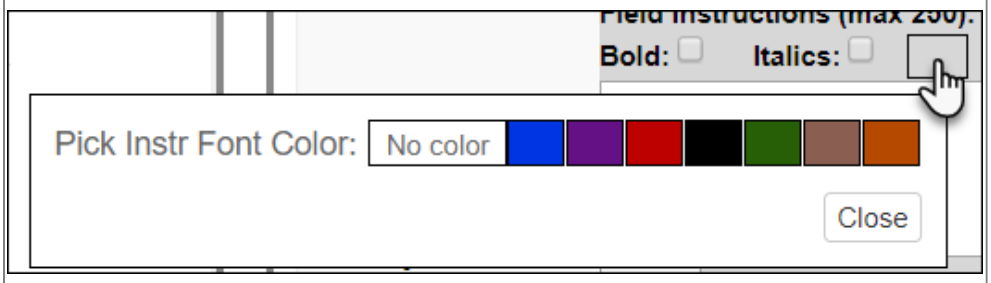
NOTE: You must save changes for each field individually.

Field name	The selected FIELD-NAME(-)-TABLE-NAME is displayed.
Friendly Name	The English default friendly name is displayed. Modify the name as needed.
Order	A default order number is assigned. (Optional) Indicate the order in which you want the fields to be displayed on the form. For example, type 1 if you want to field to be displayed at the top of the form.
Field Set	Use this column to group related fields together in the form. For example, you could type 'Mailing Address' for all fields that are related to the student's mailing address. The fields that you want to physically group together should also be together as indicated by the **Order** field. The fields with the same **Field Set** are grouped together in a box, but only if they are adjacent in the order. The box is drawn around one or more sequential fields that have a *Field Set* specified. Field Set does not apply to *New Student Enrollment* Forms.

 - Click to view additional fields.



Visible	Select if you want the field to be visible to parents on the form. Clear the check box if you do not want the field visible to parents. For example, you can hide the four-digit zip code extension. The setting of this field overrides all other visibility settings.
Editable	Select to allow parents to update data in this field from the form. • If selected, the form field will be editable, but only if the field is also set to **Updateable**=true on Form Field Management. • If not selected, this will override the other setting, and the form field will not be editable. This setting does not apply to New Student forms.
Required	Select if the field is required of the parents. If this field is selected, be sure **Edit** is also selected.
Bold	Select if you want the field to be displayed in a bold font.
Italics	Select if you want the field to be displayed in an italic font.
Color	Click the box to select a color for the field text, if you prefer a color other than black. A pop-up window opens that provides seven color choices, as well as the option for no color (i.e., black).  Click a color to select it, and the window closes.
Background Color	Click the box to select a background color for the field. A pop-up window opens that provides seven background color choices, as well as the option for no color.  Click a color to select it, and the window closes. The form is automatically shaded with an alternating (light/dark) gray background when displayed for parents in ParentPortal. If you do not select a color, or if you select **No Color**, the background will be gray.
Instructions	
Click the button to view any existing default instructions and add additional instructions for the field. A pop-up window opens.  	

Default Instructions	Any instructions entered above are displayed. They cannot be changed here.
Field Instructions	Add or update any additional instructions for the field. These instructions will be appended to the **Default Instructions** when the parent accesses the form in ParentPortal.
Bold	Select if you want the instructions to be displayed in a bold font. This selection will apply to all text typed in the **Field Instructions** area.
Italics	Select if you want the instructions to be displayed in an italic font. This selection will apply to all text typed in the **Field Instructions** area.
Color	Click the box if you want the instructions to be displayed in a color. A pop-up window opens that provides seven color choices, as well as the option for no color (i.e., black).  Click a color to select it, or click **No Color**, and the window closes. This selection will apply to all text typed in the **Field Instructions** area.

❑ Click **Close**.

 - Click the corresponding delete icon to remove a column from the form.

It is removed from the list, but it is not actually deleted until you click **Save**.

❑ Click **Save**.

NOTE: If you created a form with fields from a vertical table, some required additional fields may be added automatically. If so, a message is displayed prompting you to review the fields before saving.

Note the added fields. These fields cannot be removed; the delete icon  is not displayed.

❑ Click **Save**.

Form field edits

3. Edit settings for a 'New Student' form.

> *New Student* forms are dynamic forms used specifically for the new student enrollment process. Several *New Student* forms are included automatically and already have columns (i.e., fields) added.
>
> - New Student Address
> - New Student Contacts
> - New Student Enrollment
>
> These forms cannot be deleted or renamed; however, you can modify some of the default settings for each form column. See the **Create/edit a dynamic form using data fields** section for more details.

Under **Active Forms**:

 - Hover over a 'New Student' form and click the edit icon.

The form details open in the **Edit Form** section (right side) where you can add or edit details as described previously.

 - To remove a column from the form, click the corresponding delete icon.

It is removed from the list, but it is not actually deleted until you click **Save**.

❑ Click **Save**.

4. Create a new form by copying an existing form.

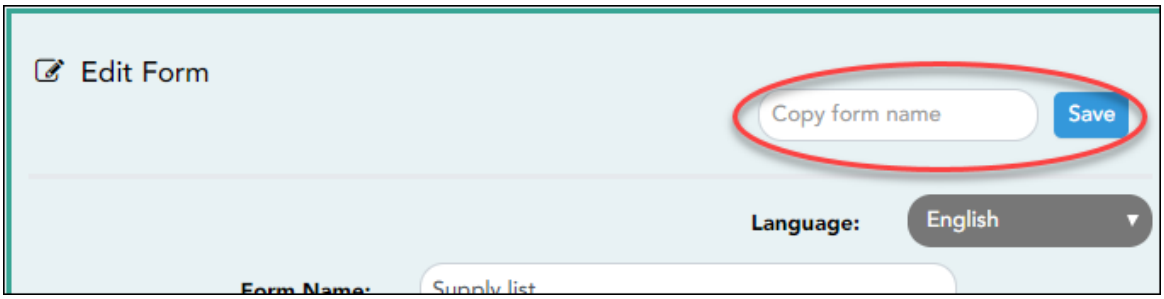
> An existing static or dynamic forms can be duplicated and renamed.
>
> Only saved changes are copied to the new form; unsaved changes are not copied.

❑ Click **Copy Form** to create a new form that is an exact duplicate of the form you are copying.



A text box is displayed allowing you to type a name for the new form.

The new form name cannot already be in use by another form, and it must be three or more characters.



❑ Type the new form name and click **Save**.

The new form is now displayed on the **Active Forms** list and can be modified as needed.

New forms are initially displayed at the top of the list. Once the page is refreshed, the form is sorted alphabetically with the section.

5. Create a custom form.

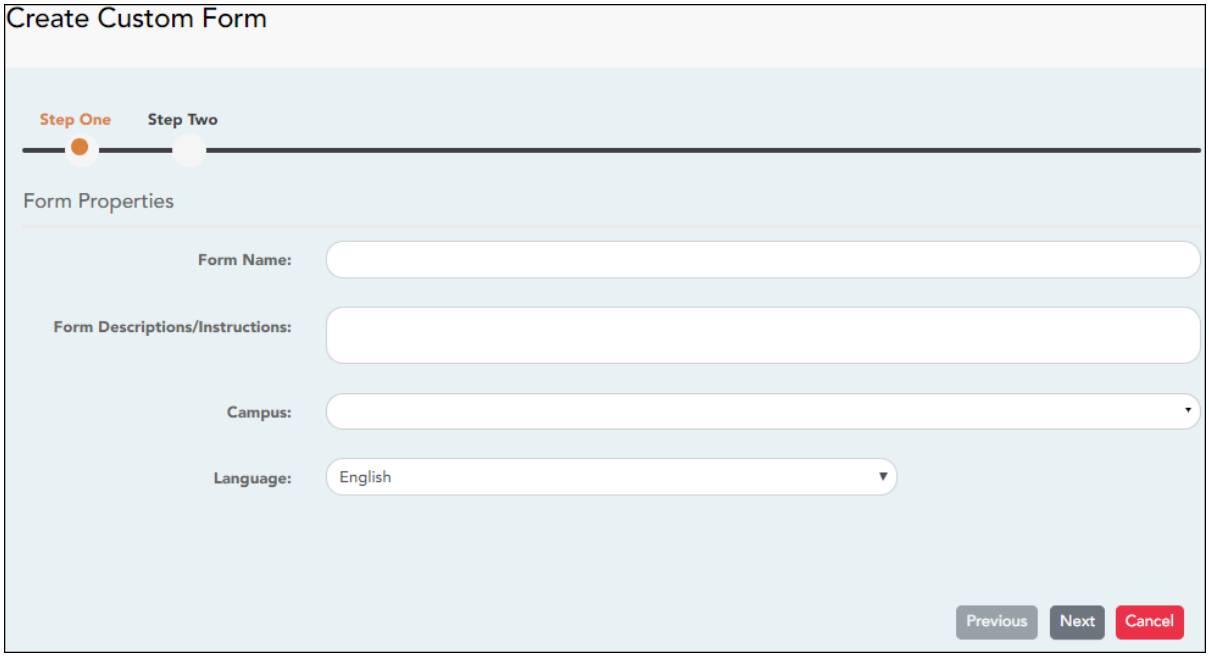
ASCENDER Parent Portal Admin > Form Management > Custom Forms > Create Custom Form

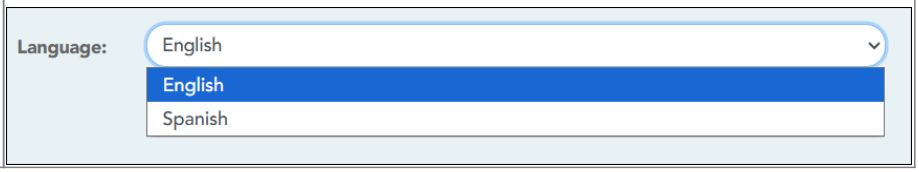
Step 1

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.

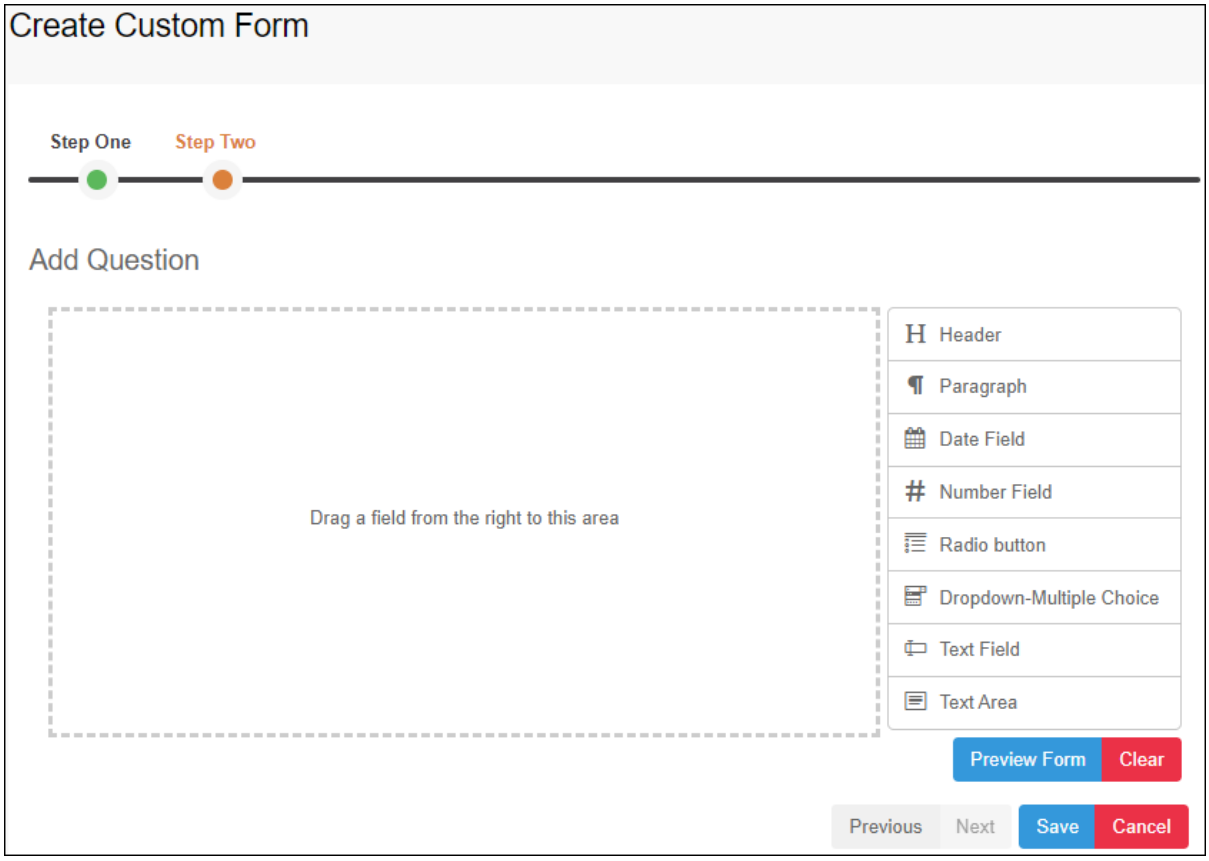


Form Name	Type a name for the form, using up to 50 characters. For a *Spanish* form, provide the name in Spanish.
Form Descriptions/Instructions	Type any specific district-level instructions for the form, using up to 500 characters. For a *Spanish* form, provide the instructions in Spanish.
Campus	(Required) Select a campus in order to assign the form to a specific campus. Or, select *All Campuses* if the form is used for all campuses in the district. If you select *All Campuses*, each campus is listed, and you can remove individual campuses if needed.  **NOTE:** If you select *All Campus* by mistake, click *Cancel All* to clear all campuses at once.
Language	Select the language of the form. **WARNING:** Once the language option is selected, it cannot be changed. 

❑ Click **Next**.

Step 2

Question Format Types:



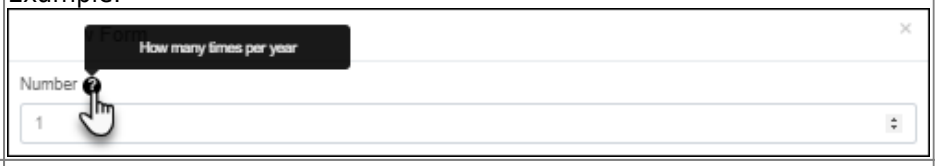
❑ You can add a variety of elements to your form.

- 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.

Header	Select to add a heading, up to 50 characters. Example: 
Paragraph	Select to provide one or more sentences in the form, such as instructions, up to 1000 characters. Example: 

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

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

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

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

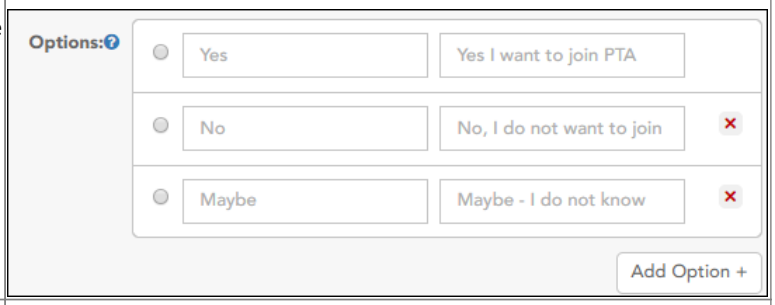
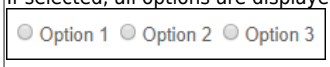
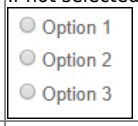
TIP: Be sure to add questions to the custom form that help identify the student that the information is being gathered for (e.g., What is your student's first name? What is your student's last name? Grade Level? What school does your child attend? (multiple choice)). The form results do not automatically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

Required	Select if parents are required to answer this question.
Label	Type the question as you want it to appear in ParentPortal. **NOTE**: Labels should be different for each field on individual forms. This text is for internal use when viewing custom form data.
Tool Tip	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.
Placeholder Text	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 *name@email.com*. The parent's actual answer will overwrite any placeholder text. For **Date Field**, 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
Size	Header	Select the font size for the header.
Description	Paragraph	Type any instructions or information about the form.

Property	Question Type(s)	Description
Options	Radio button, Dropdown-Multiple Choice	Type each option the parent can choose from. There are two fields for each option: • In the left field, type the option as it should be displayed in ParentPortal. • 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. • Click **Add Option +** to add as many options as needed. • Click ✕ to remove an option. 
Allow Multiple Selections	Dropdown-Multiple Choice	Indicate if the parent can choose more than one option.
Display Options Horizontally	Radio button	If selected, all options are displayed on the same row.  If not selected, each option is displayed on a separate row. 
Default Value	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 **Placeholder Text** is displayed.
Minimum/Maximum Number	Number Field	Specify a range of numbers that are allowed.
Minimum/Maximum Date	Date Field	Specify a range of dates that are allowed.
Maximum Characters	Text Field, Text Area	Indicate the maximum number of characters the parent can enter.
Number of Rows	Text Area	Specify how tall the text area is. The number of rows does not affect the number of characters the parent can enter.
Input Type	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.

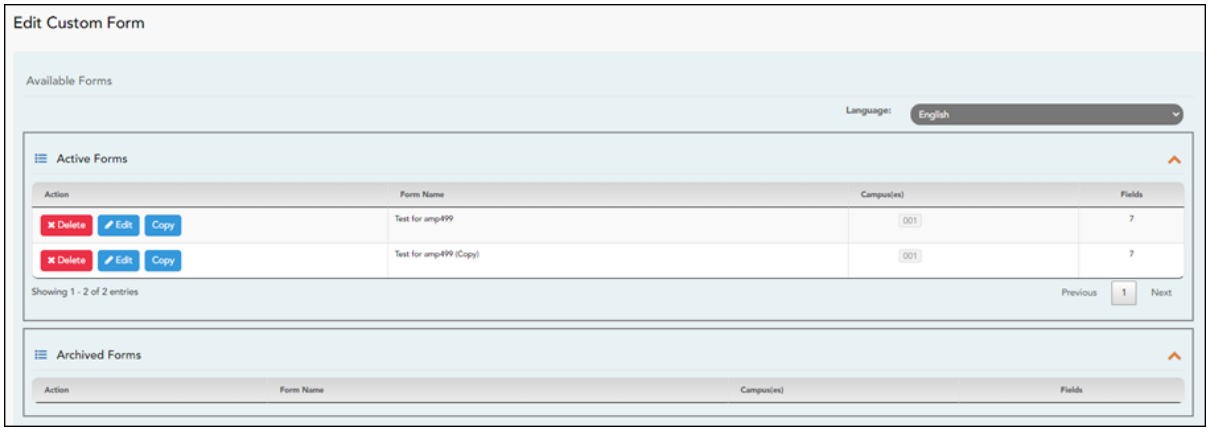
❑ Click **Save**.

❑ 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.

ASCENDER Parent Portal Admin > Form Management > Custom Forms > Edit Custom Form

This page allows you to view or modify existing custom forms that you have created. Copy allows you to copy a form and add or remove fields.



Your existing custom forms are listed. **Active Forms** are listed first, and **Archived Forms** are listed below active forms.

To translate an *English and Spanish* form into Spanish, select Spanish from the **Language** drop-down menu and select **Edit**.

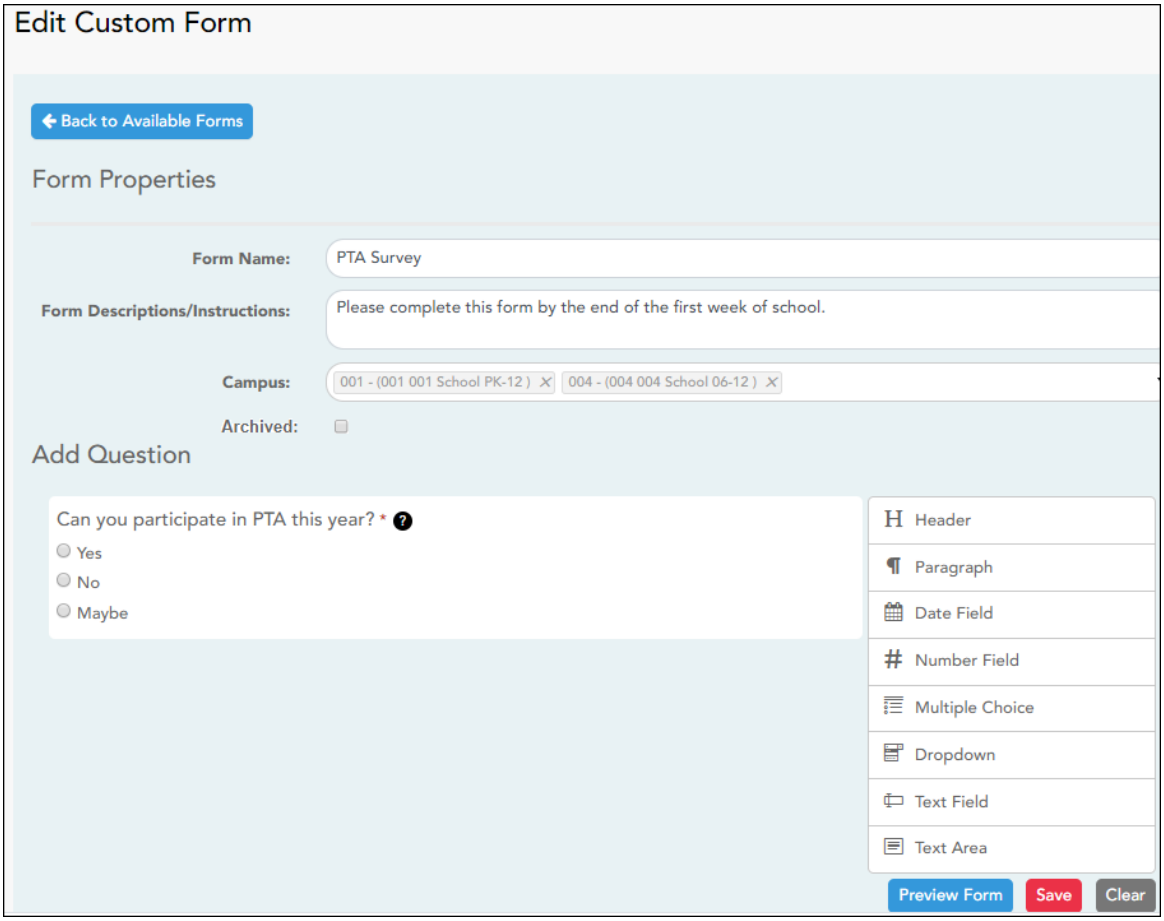
WARNING: When translating into Spanish, only translate the text, **do not** change the order of the Questions or add any Questions. Doing so will cause data in the Spanish version to become out of sync with the English version.

❑ Click **Edit** to view/modify a form.

The form opens in editing mode. You can make changes as described on Custom

Forms > Create Custom Form.

NOTE: Custom Forms with data attached have limited edit capabilities. The campus cannot be edited and fields cannot be rearranged, deleted or duplicated. If major changes are required, it is recommended to use the **Copy Form** feature to create a new form.



How to Check Your File

You can quickly check your content by copying it into Notepad. This removes hidden formatting that may cause issues.
After pasting, please review the following:

- Check quotation marks
  - Ensure all quotes appear as: ' '
  - Replace any curly quotes such as: “”
- Remove extra spacing
  - Delete any unnecessary line breaks or blank lines
- Review backlashes \ \
  - If you see \, confirm it is intentional

- Remove unusual characters
    - If anything looks incorrect or out of place, delete and retype it
- Keep formatting simple
    - Use standard letters, numbers, and basic punctuation only

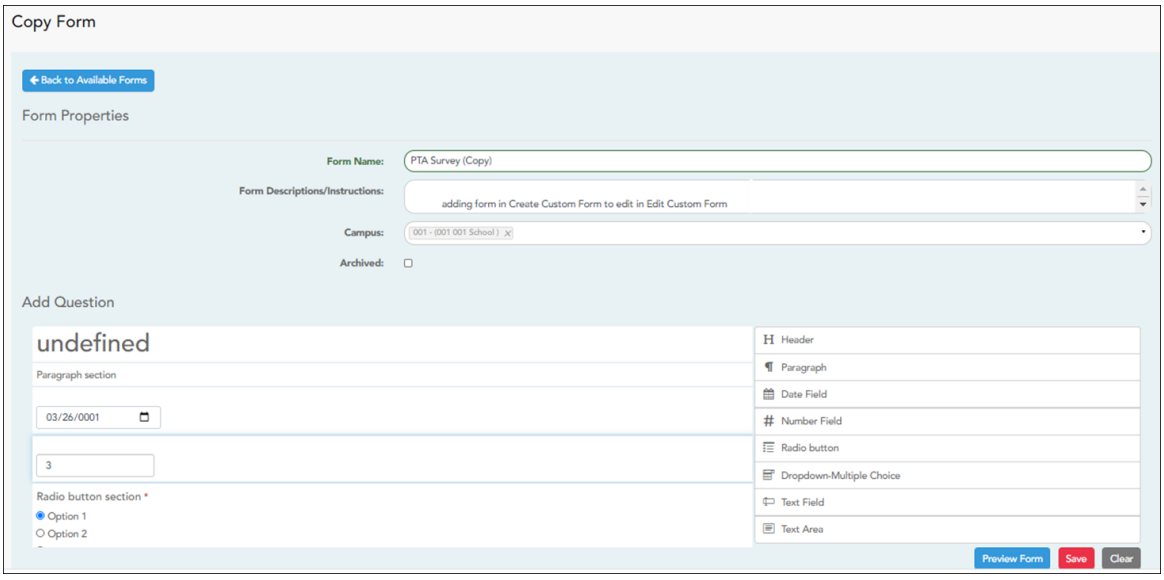
Characters That May Cause Issues

The following characters need special handling and may cause errors if not formatted correctly:

- Quotation mark (' ') > use \“
- Backslash (\) > use \ \
- Forward slash (/) > can be written as \/
- Backspace > \b
- Form feed > \f
- New line > \n
- Carriage return > \r
- Tab > \t

❑ Or, click **Copy** to copy a form.

The form opens in editing mode. You can make a copy of a form and add or remove fields as described on Custom Forms > Create Custom Form. The **Form Name** field is limited to 50 characters.



❑ Select **Archive** to archive the form.

Archiving allows you to retain forms that may still be needed for reporting purposes but are no longer used for data collection. An archived form is still accessible to administrators, but is grouped with other archived forms for organizational purposes.

❑ Click **Back to Available Forms** to return to the list of existing custom forms.

❑ Click **Delete** to delete a custom form.

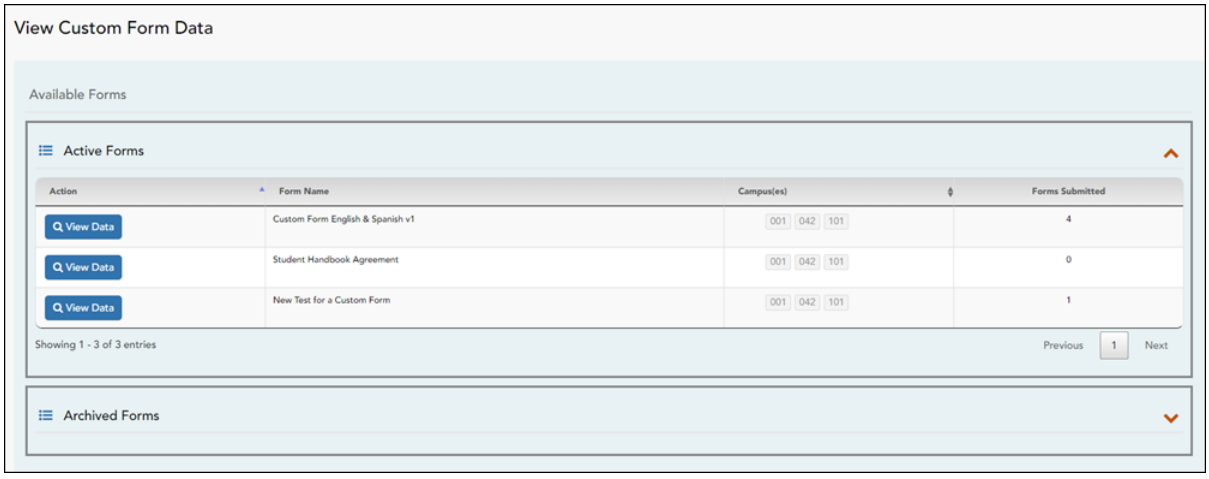
> **NOTE:** A custom form cannot be deleted if there is data associated with it.

ASCENDER Parent Portal Admin > Form Management > Custom Forms > View Custom Form Data

This page allows you to view data submitted by parents in custom forms.

Your existing custom forms are listed. **Active Forms** are listed first, and **Archived Forms** are listed below active forms.

> **NOTE**: Archived forms are forms that may still be needed for reporting purposes but are no longer used for data collection. An archived form is still accessible to administrators, but is grouped with other archived forms for organizational purposes.

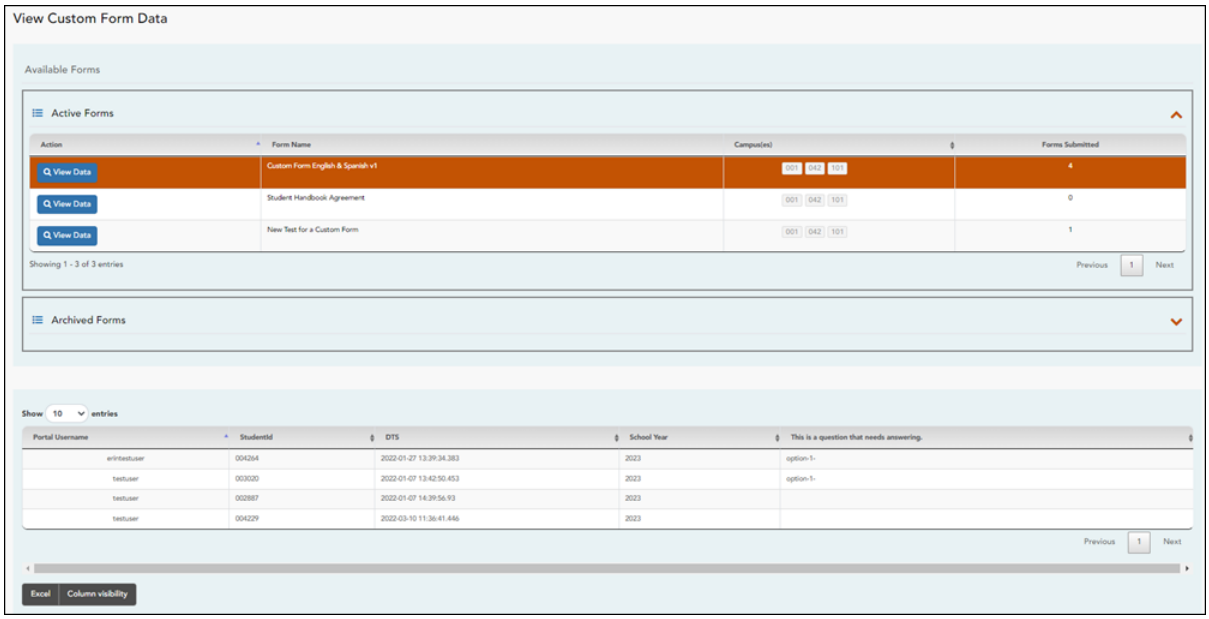


Form Name	The name of the custom form is displayed, as entered in Step 1 on the Create Custom Form page.
Campus	The campuses using the custom form are listed.
Forms Submitted	The number of form responses submitted by parents is displayed.

❑ Click **View Data** to view the answers submitted by parents. <div indent>The answer

data is displayed in a grid below the forms list.

TIP: You can click the column headings to sort data by a particular question.



Excel	Click to export the report as a spreadsheet.
Column visibility	Click to select which columns to include in the export.

NOTE: It is recommended that you save a backup copy of the form once all data is gathered.

4. Edit, delete, or archive existing forms.

ASCENDER ParentPortal Admin > Form Management > Form Creator

Once a form is created, it can be edited, archived, and deleted.

Edit a form:

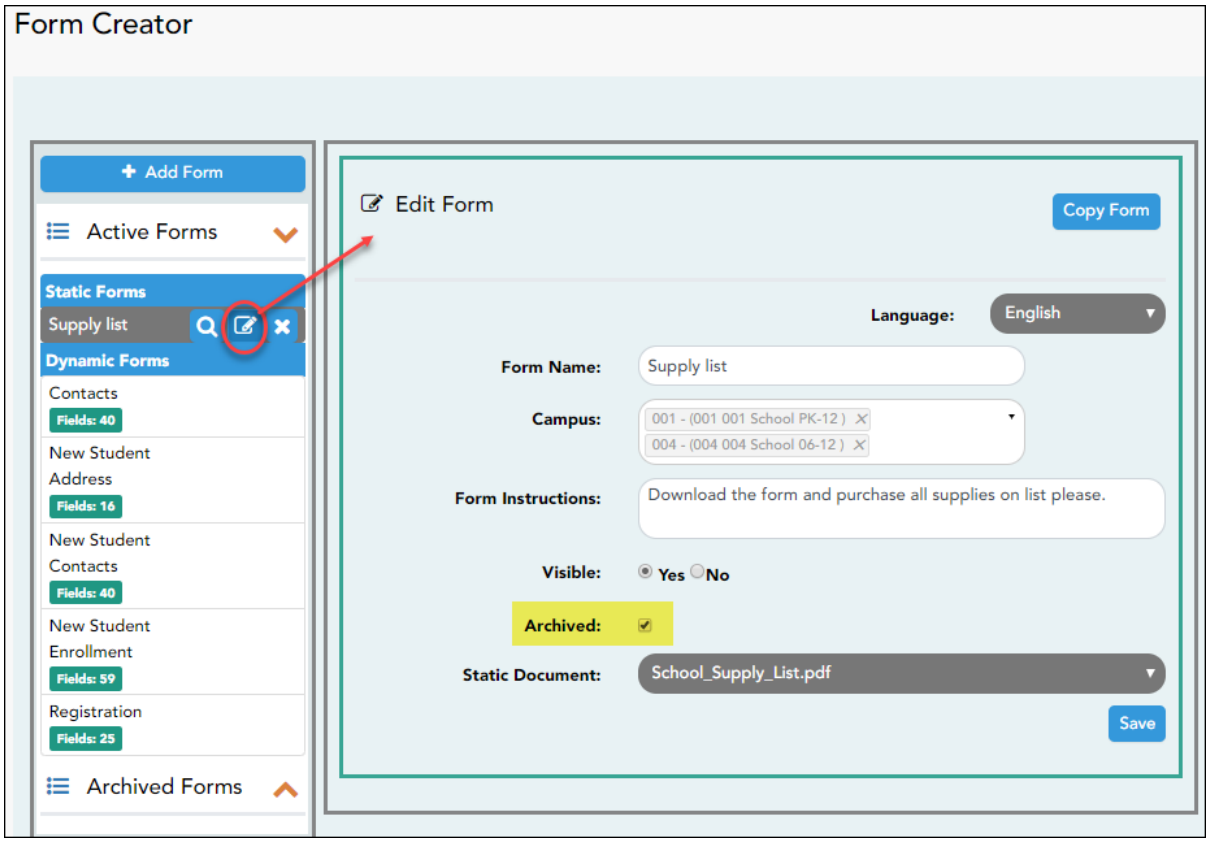
❑ Under **Active Forms**:

- Hover over the new or existing form and click the edit icon.

The form details open in the **Edit Form** (right) section where you can edit details as described previously.

Archive a form:

Archiving allows you to retain a form that may still be needed for reporting purposes but is no longer used for data collection. An archived form is no longer available to parents, but it is still accessible to administrators and grouped with other archived forms. A form can be un-archived at any time.

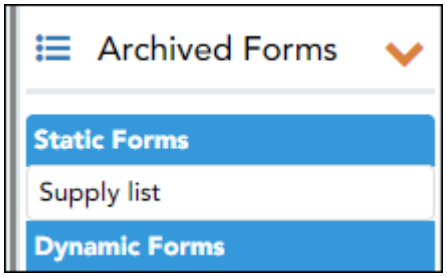


❑ Under **Active Forms** (left):

- Hover over the new or existing form and click the edit icon.

The form details open in the **Edit Form** (right) section. Select **Archived** and click **Save**.

The form moves from the **Active Forms** list to the **Archived Forms** list.



Clear the **Archived** field if you want to make the form active again. The form will move back to the **Active Forms** list.

Delete a form:

❑ Under **Active Forms** (left):

- Hover over the new or existing form and click the delete icon.

You are prompted to confirm that you want to delete the form. Click **OK**.

NOTE: You cannot delete a form if it belongs to a group or if data exists for the form (i.e., if a parent has submitted changes associated with the form).

5. Create groups and add forms to groups:
    1. Create the New Student Enrollment forms group.

ASCENDER ParentPortal Admin > Form Group Management > New Student Enrollment

This page allows district-level users to add or modify the list of forms associated with enrollment of new students.

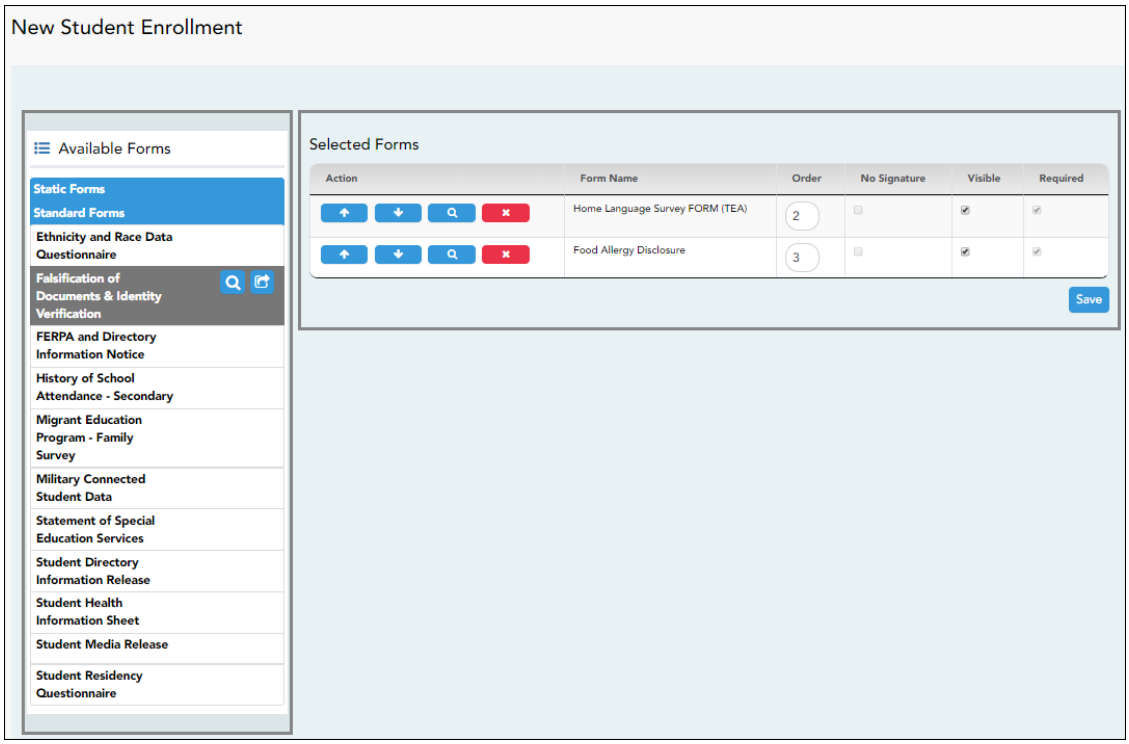
The list of available forms is pre-set and cannot be modified.

NOTE:

Only static and standard forms can be added for New Student Enrollment Forms Group. Custom forms are not available for New Student Enrollment. The dynamic forms for New Student Enrollment are added by default and aren't viewable here.

Any selected static forms will be available to parents on Step 5 of the New Student Enrollment process; the parent can view, print, complete, and hand deliver these forms to the campus.

Download Standard Forms:



❑ In the **Available Forms** (left) list:

- Hover over the form and click to preview the form. The form opens in a separate browser window.
- Hover over the form and click to add the form to the New Student Enrollment group.

❑ The form is added to the **Selected Forms** (right) list where you can modify certain properties:

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 in ParentPortal allowing the parent to submit or acknowledge the form. The form will be displayed as a read-only form. **NOTE:** For standard forms, the field is disabled; it is cleared by default and cannot be selected.
Visible	Select to make the form visible to parents. If 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.
Required	Select to indicate to the parent that the form is required. **NOTE:** For standard forms, the field is selected by default and cannot be cleared. For static forms, the field is cleared by default and cannot be selected.

❑ You can modify the order in which the forms are displayed in ParentPortal:

 - Click to move the form up the list.
 - Click to move the form down the list.

❑ Click **Save**.

❑ Under **Selected Forms**:

 - Click to preview the form. The form opens in a separate browser window.
 - Click to delete the form from the group.

You are prompted to confirm that you want to delete the form. Click **OK**. The form is removed from the list on the right and moved back to the **Associated Forms** list on the left.

2. Create the Returning Student Registration forms group.

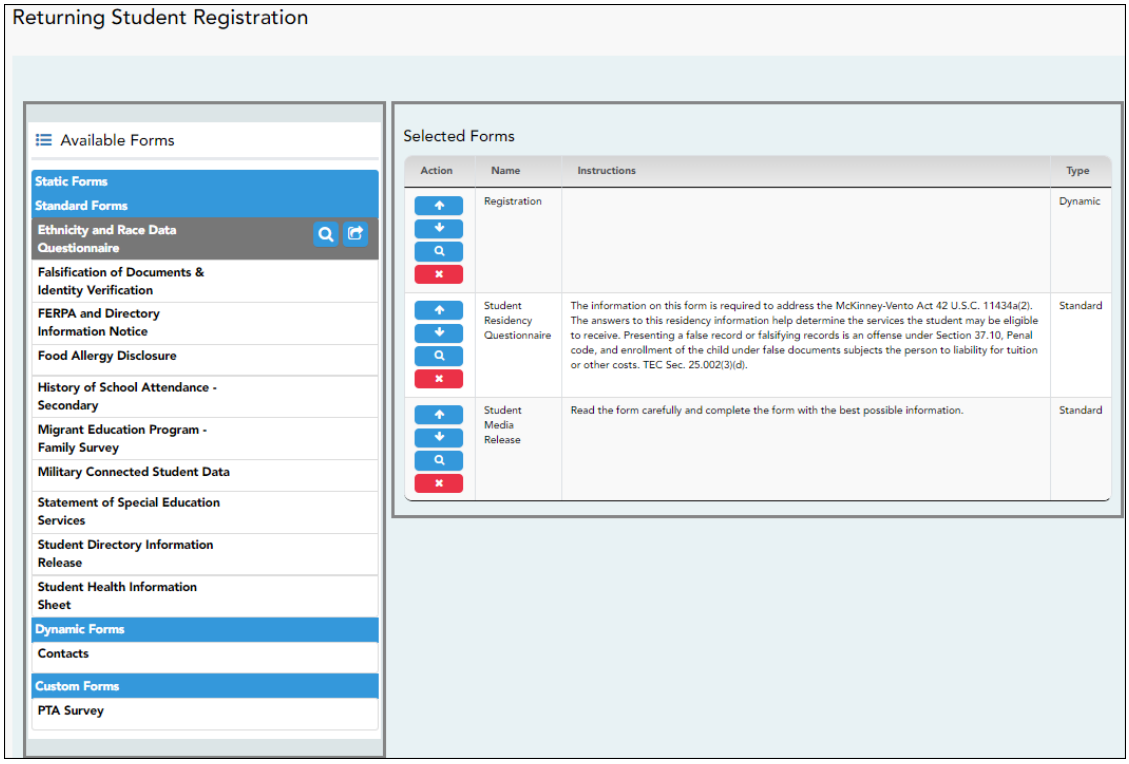
ASCENDER ParentPortal Admin > Form Group Management > Returning Student Registration

This page allows district-level users to create a set of forms for annual registration of returning students.

NOTE: Returning Student Registration refers to forms required annually for returning students, which is not the same as New Student Enrollment.

When Returning Student Registration is enabled at the district, these forms will be displayed to parents when they are logged on to ParentPortal, and parents will have notifications indicating their progress in the registration process.

Download Standard Forms:



❑ In the **Available Forms** (left) list:

- Hover over the form and click to preview the form. The form opens in a separate browser window.
- Hover over the form and click to add the form to the Online Registration group.

❑ The form is added to the **Selected Forms** (right) list:

IMPORTANT: Once a form is added to the group, it is live. There is no Save button.

Instructions	The instructions are displayed, as entered in **Form Instructions** on Form Management > Form Creator.
Type	The form type is displayed.

❑ You can modify the order in which the forms are displayed in ParentPortal:

 - Click to move the form up the list.
 - Click to move the form down the list.

❑ Under **Selected Forms**:

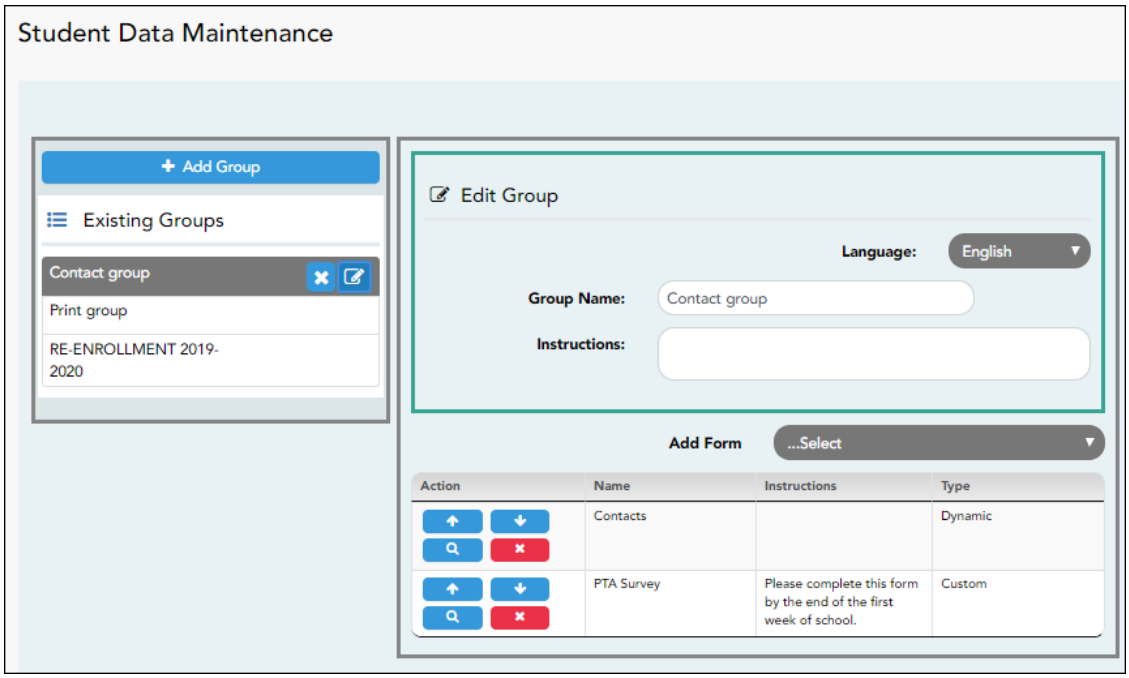
 - Click to preview the form. The form opens in a separate browser window.
 - Click to delete the form from the group.

You are prompted to confirm that you want to delete the form. Click **OK**. The form is removed from the list on the right and moved back to the **Available Forms** list on the left.

3. Create the Student Data Maintenance forms group.

ASCENDER ParentPortal Admin > Form Group Management > Student Data Maintenance

This page allows district-level users to create a group of forms that parents can use for student data maintenance, such as changes to demographic data throughout the year (e.g., address or phone number changes).



Add a group:

❑ Click **+ Add Group**.

A pop-up window opens.



Group Name	Type a name for the group.
Instructions	Add or update any instructions for the form group, such as clarification about which forms are included in the group. **NOTE:** If you are creating a group for Spanish forms, the instructions should be typed in Spanish. If you do not type Spanish instructions under **Instructions**, English instructions will be displayed even if the parent is viewing ParentPortal in Spanish.

❑ Click **Add Form Group**.

The group is added to the **Existing Groups** (left) list.

Edit a new or existing group:

❑ In the **Existing Groups** (left) list:

 - Hover over the new or existing group and click the edit icon.

The group details open in the **Edit Group** section (right) where you can add or edit group details:

Language	Select the language of the forms in the group. **NOTE:** If you select Spanish, but you did not type Spanish instructions under **Instructions**, English instructions will be displayed even if the parent is viewing ParentPortal in Spanish.
Group Name	The current group name is displayed and can be edited.
Instructions	The current instructions for the form group are displayed and can be edited. **NOTE:** If you are creating a group for Spanish forms, the instructions should be typed in Spanish. If you do not type Spanish instructions under **Instructions**, English instructions will be displayed even if the parent is viewing ParentPortal in Spanish.
Add Form	Select each form you want to add to the group. Be sure to select forms that correspond to the selected **Language**.

As forms are added, they are listed below the **Edit Group** section in the order they were added.

❑ You can modify the order in which the forms are displayed in ParentPortal:

 - Click to move the form up the list.
 - Click to move the form down the list.

❑ Under **Edit Group** (right):

 - Click to preview the form. The form opens in a separate browser window.
 - Click to delete the form from the group.

You are prompted to confirm that you want to delete the form. Click **OK**. The form is removed from the group but not deleted from the ParentPortal server.

❑ Under **Existing Groups** (left):

- Hover over and click the icon to delete a group.

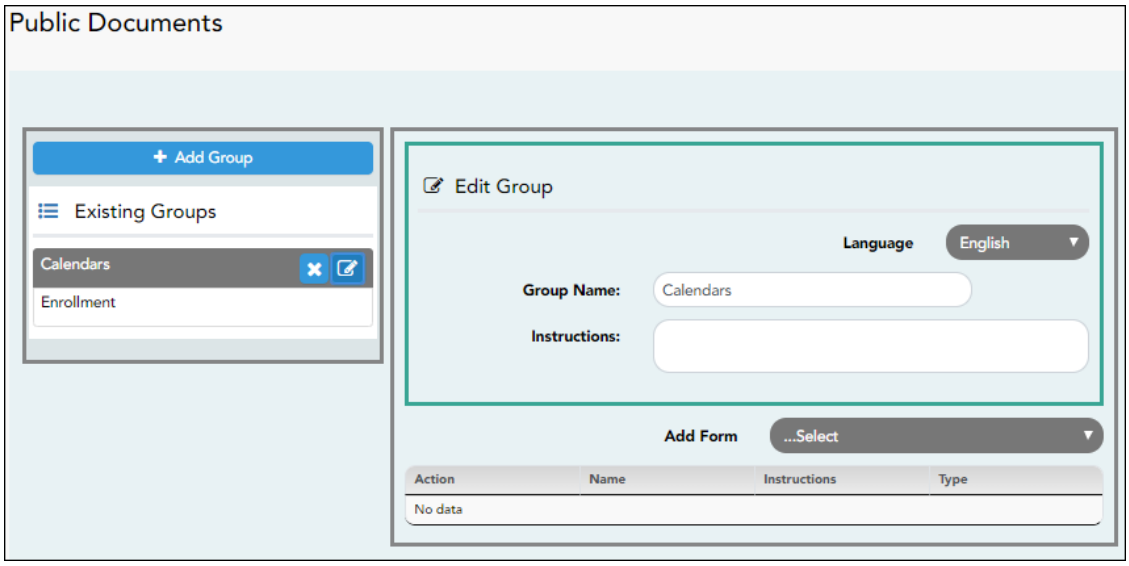
4. Create the Public Documents group.

ASCENDER ParentPortal Admin > Form Group Management > Public Documents

This page allows district-level users to create a group of forms that a parent can access without having a ParentPortal account, such as calendars, school supply lists, etc. The parent will be able to access these documents without logging on.

Only static forms can be added to these groups. If at least one static form has been added to this group, the parent can click the ***District Name*** **Documents** link on the ParentPortal login page to access the documents.

NOTE: A static form must already be created for each uploaded document before it can be added to a group.



Add a group:

❑ Click **+ Add Group**.

A pop-up window opens.



Group Name	Type a name for the group.
Instructions	Add or update any instructions for the form group, such as clarification about which forms are included in the group. **NOTE:** If you are creating a group for Spanish forms, the instructions should be typed in Spanish. If you do not type Spanish instructions under **Instructions**, English instructions will be displayed even if the parent is viewing ParentPortal in Spanish.

❑ Click **Add Form Group**.

The group is added to the **Existing Groups** (left) list.

Edit a new or existing group:

❑ In the **Existing Groups** (left) list:

 - Hover over the new or existing group and click the edit icon.

The group details open in the **Edit Group** section (right) where you can add or edit group details:

Language	Select the language of the forms in the group. If you are creating a group for Spanish forms, select Spanish.
Group Name	The current group name is displayed and can be edited.
Instructions	The current instructions for the form group are displayed and can be edited. **NOTE:** If you are creating a group for Spanish forms, the instructions should be typed in Spanish. If you do not type Spanish instructions under **Instructions**, English instructions will be displayed even if the parent is viewing ParentPortal in Spanish.

Add Form	Only static forms are listed. Select each form you want to add to the group. Be sure to select forms that correspond to the selected **Language**.

As forms are added, they are listed below the **Edit Group** section in the order they were added.

❑ You can modify the order in which the forms are displayed in ParentPortal:

 - Click to move the form up the list.
 - Click to move the form down the list.

❑ Under **Edit Group**:

 - Click to preview the form. The form opens in a separate browser window.
 - Click to delete the form from the group.

You are prompted to confirm that you want to delete the form. Click **OK**. The form is removed from the group but not deleted from the ParentPortal server.

❑ Under **Existing Groups** list (left side):

 - Hover over and click the icon to delete a group.

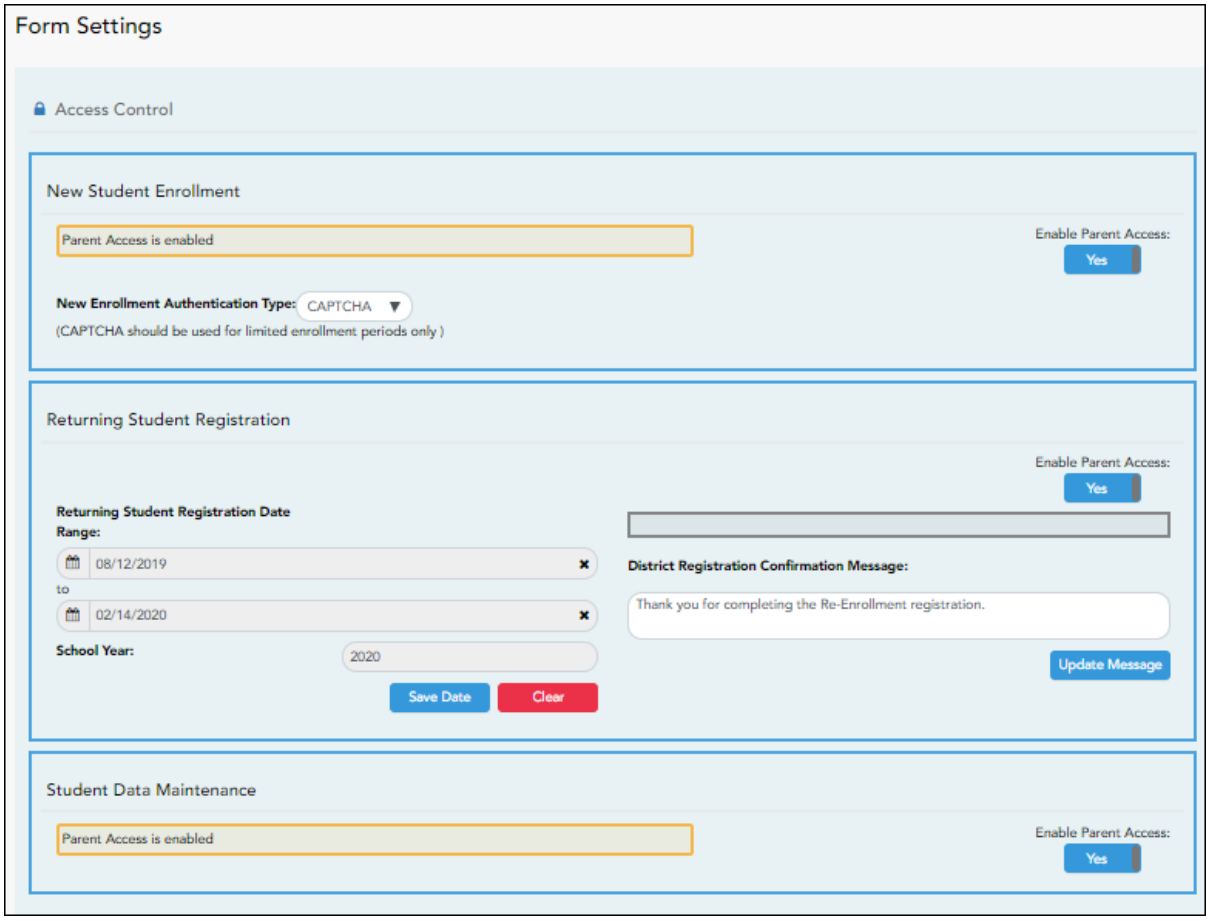
6. Enable forms for parents.

ASCENDER ParentPortal Admin > Admin Menu > Form Settings

Once forms are set up, you can enable New Student Enrollment, Returning Student Registration, and Student Data Maintenance in ParentPortal throughout the district, and manage other form settings.

NOTE: Public Documents (i.e. calendars, school supply lists, downloadable registration forms) will be available on the ASCENDER ParentPortal Login page once the static forms have been created (Form Management > Document Upload

and Form Management > Document Upload > Form Creator) and added to the Pubic Documents group (Form Group Management > Public Documents).



Access Control:

New Student Enrollment

❑ Enable or disable new student enrollment in ParentPortal.

Enable Parent Access	This field enables and disables New Student Enrollment in ParentPortal. This field is set to **No** by default. Leave set to **No** until setup is complete and you are ready to enable Student Enrollment. When set to **Yes**. the **Enroll a New Student** button will become active on the ParentPortal allowing the parent to enroll a new student in the district.

New Enrollment Authentication Type	Select the user validation method for Student Enrollment: **Email** - Validate a user by email. With this validation process, an email message is sent to the user's email address containing the registration code. The user must type the code, exactly as it appears in the message, in order to continue with the enrollment process. **CAPTCHA** - Validate a user by CAPTCHA, which is a tool that protects websites against bots by generating codes that humans can pass but computer programs cannot pass. When this option is enabled, the registration key is automatically generated once you correctly enter the CAPTCHA code. An email message is sent to the parent containing the registration key. **IMPORTANT:** The CAPTCHA option should only be used during short-term enrollment events such as Kinder Roundup.

Returning Student Registration

❑ Enable or disable annual registration of returning students.

Enable Parent Access	This field enables and disables Returning Student Registration. Select **Yes** if you will be using Returning Student Registration. Use **Online Registration Date Range** to control when Returning Student Registration is available to parents.
Online Registration Date Range	To specify the beginning and ending dates for registration: ❑ Click in the field, and a calendar opens. ❑ First click the start date, then click the end date. The calendar closes once you click the end date. When the current date falls on or within these dates, parents will be able to use Returning Student Registration for students who are enrolled in the district. If no dates are entered, or if the current date is outside the date range, Returning Student Registration is not available in ParentPortal.
School Year	The displayed school year is determined by looking at the From/Beginning date-year to determine the school year/ending year that Returning Student Registration is for.
District Registration Confirmation Message	❑ Type a message that will be displayed to parents upon successfully completing Registration in ParentPortal. ❑ Click **Update Message**.

Notes:

- Annual Student Data Rollover (ASDR) does not need to be run prior to enabling parent access to Returning Student Registration.

- Districts can accept or reject pending changes for returning students before or after Annual Student Data Rollover (ASDR) has been run.

Student Data Maintenance

❑ Enable or disable ongoing student data maintenance.

Enable Parent Access	This field enables and disables Student Data Maintenance in ParentPortal.

What Happens Next?

Review enrollment requests:

As students are enrolled online in ParentPortal, an administrator must review each enrollment request, create a record for each registered student, and assign a ParentPortal ID to each student.

See the following guides:

- Parent: Enroll New Student
- Campus: Accept Student & Issue ID

Review student demographic change requests and form submission:

As parents update data for their students and/or complete Returning Student Registration, campus staff must review and approve each data change. As parents submit data and forms from ParentPortal, the campus staff can monitor the status and identify students who are missing required forms.

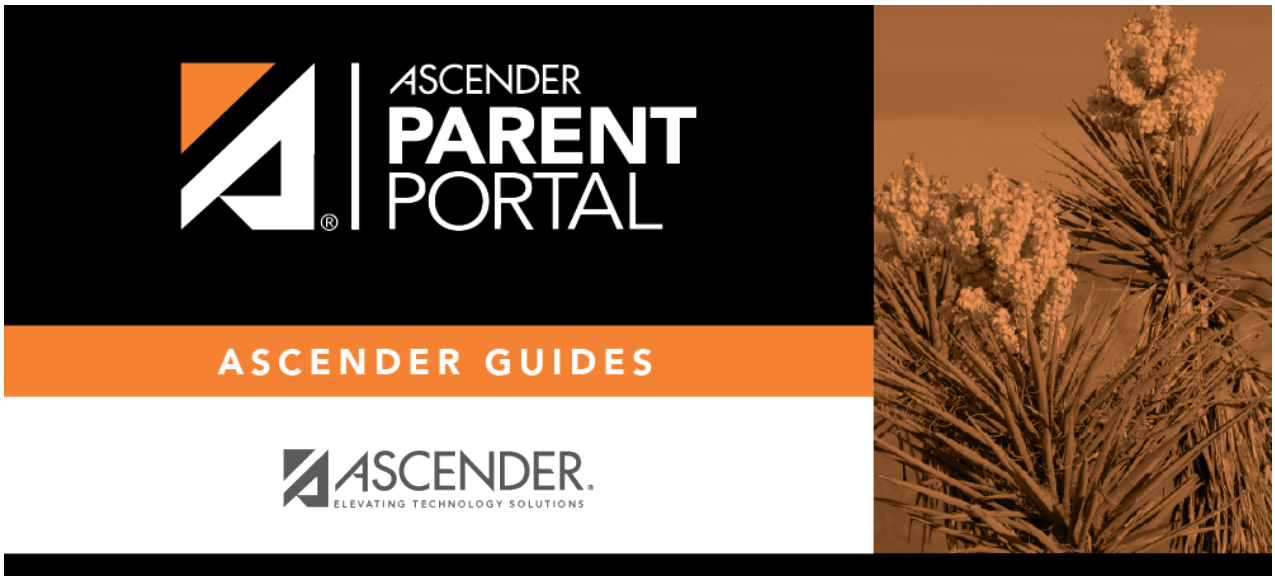
See the following guides:

- Parent: Add/Register Student
- Parent: Maintain Student Data
- Campus: Review & Accept Data Changes

View form usage:

- **Form Management > Form Usage > Usage Statistics** - Displays information about form usage across the district or campus, or for a specific parent. Archived forms are not included in these counts.
- **Form Management > Form Usage > Individual Form Information** - Displays data that is collected when a parent makes changes online to a student's registration information or accepts the data that is currently stored in the registration tables. You can retrieve and delete data for a specific form for the entire campus or district, as well as by parent.

2.


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