






A Teachers Guide to Creating & Distributing Forms

The SchoolSoft Form Manager provides a quick and easy way for teachers and administrators to create, distribute and collect digital forms that require a parent's signature.

Understanding the Form Manager

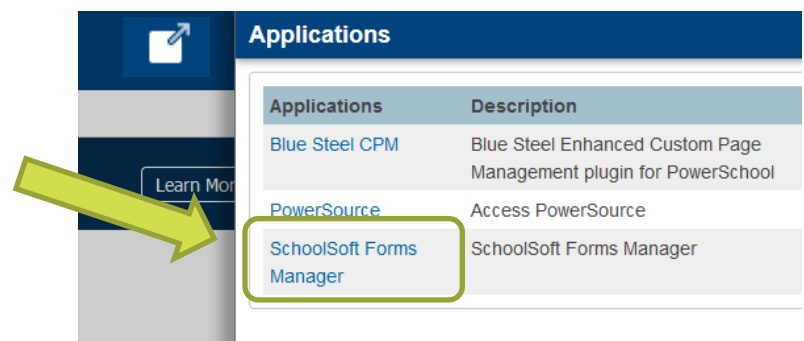
It is important to understand that the Form Manager authenticates users and pulls data from the PowerSchool Student Information System. Therefore, in order for teachers, parents and students to be able to access the Form Manager, be sent and sign forms, or be included in distribution lists, the information must be in PowerSchool. The Form Manager also pulls its default distribution groups from PowerSchool, these include a distribution list for all students, grade groupings, and homeroom or course groupings of students. Distribution lists can be created manually for situations where the group of students is not included in PowerSchool, this may include sports teams, school clubs, or student council. Each teacher account by default provides teachers with access to only the students who they teach or the distribution lists associated with the classes/courses they are attached to in PowerSchool, unless the Form Manager System Administrator has granted the teacher account access to all students.

Most pages in the Form Manager have support resources accessible by users. Look for the following icons:

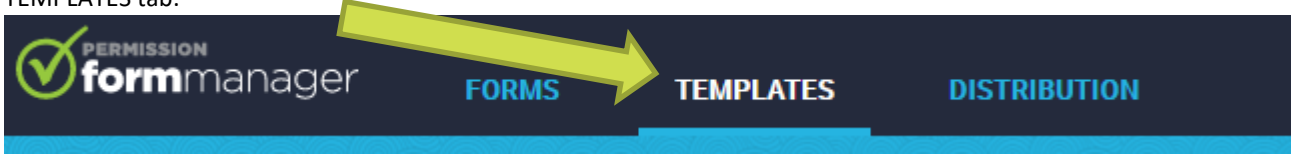
-  Click to view an on-screen demo of the functions and features associated with where you are in the Form Manager.
-  Hover over to view text-based information related to the functions and features associated with where you are in the Form Manager
-  Allows you to submit feedback for future improvement on any page.

Steps to Creating a Form

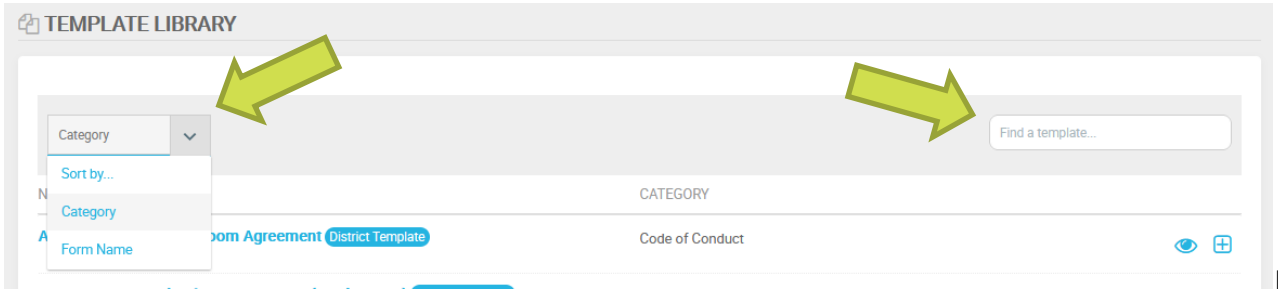
1. To access the Form Manager, log into PowerSchool, click the applications icon in the upper page menu bar and select the SchoolSoft Form Manager from the list of applications.



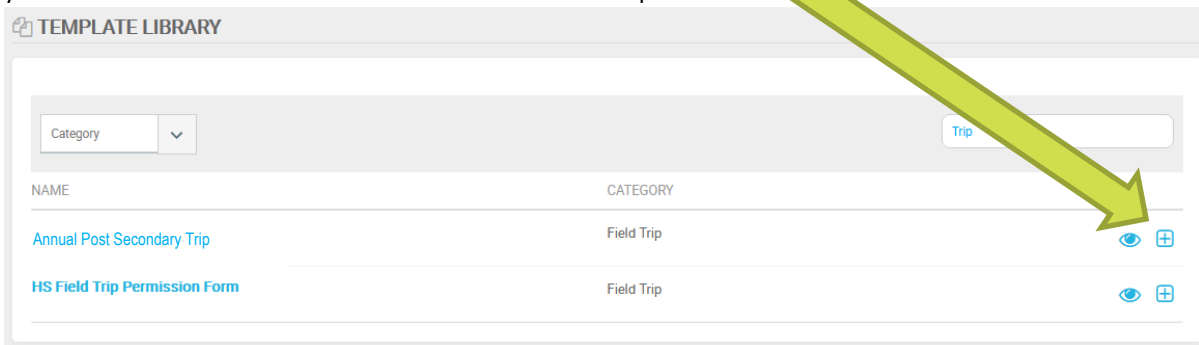
- Forms are created based upon templates in the Template Library. Access the Template Library by clicking the TEMPLATES tab.



If the Template Library contains numerous templates, you can sort by name or category. You can also search for a template by part or all of its name. If a template you are looking for does not exist, it will need to be created by the Form Manager System Administrator or other staff member granted template authoring privileges before it can be sent.



- Select the desired template. You can click to view the template and confirm it is the one you are wanting to use for your form. Click the to create a form based on the template.



- Enter a name that describes the form to the recipients. Then click the CREATE button.

CREATE NEW FORM

FORM NAME *
(DISPLAYED TO FORM RECIPIENT)

Field Trip to the Museum of Modern Art

SELECT TEMPLATE *
HS Field Trip Permission Form

Year-round form

CREATE CANCEL

Only check the Year-round form option when the form will need to be provided to students who enter the school or class later in the school year.

5. The template is displayed and prompts you for the form elements that are requiring attention in order for the form to be complete. Look for the **Teacher to EDIT** tag.

EDIT FORM CONTENT STEP 1

Apple Grove High School
4220 Richmond Cir
Jackson, MS, 39203
Tel: (916) 555-1200

SchoolSoft
School District

Apple Grove High School Field Trip Permission Form

Field Trips are an important part of our hands-on approach to learning at Apple Grove High School. Your consent is required for #studentName to participate in any off-site activity.

Teacher to EDIT

Name of Teacher(s): <input text here>

Purpose of the trip and How it relates to the curriculum:
<input text here>

Destination: <input text here>

Departure Date: <input text here>
Departure Time: <input text here>

Return Date: <input text here>
Return Time: <input text here>

Modes of Transportation: <input text here>

Cost: <input text here>

I, #guardianName, understand the learning opportunity and risks associated with this field trip and request that my child, #studentName, be permitted to participate in

This template requires the teacher to provide the field trip details

6. Once the **Teacher to EDIT** Form Elements have been completed you can **PREVIEW** the form to confirm the form appears with the desired information. Click the **NEXT** button at the bottom of the page to prepare the form for distribution.

PREVIEW **NEXT** **SAVE & CLOSE** **CANCEL**

Save and close will place your form under the DRAFT forms group on your MY FORMS page. There you can access and continue to edit the form at a later time.

- Select the group(s) of students whose parents you want to distribute the form to from the drop-down list. You do this by placing a check in the applicable box(es) and then clicking the ADD button to attach the distribution group(s) to the form.

ASSIGN DISTRIBUTION GROUPS / STUDENTS

(SELECT AND CLICK ADD)

Add groups

Grade 12

Grade 13

Grade 9

AC AP 2D Art & Design: Photography, 1 4(A)

Parents of individual students who are not part of the selected distribution group can be included by selecting the ADD STUDENT button. If a distribution group does not appear either the teacher is not associated with the expected group or it does not exist in PowerSchool. In this case, you can create a group manually for the form, just save the form as a draft using the SAVE & CLOSE button and create it manually by clicking the DISTRIBUTION tab at the top of the screen followed by the CREATE DISTRIBUTION LIST. *Note that teachers will only have access to the students they teach unless they have been granted access to all students by the System Administrator.* Once the new list is created, click the MY FORMS tab to continue working on your draft form.

- To distribute the form, enter the return by date and chose an option or click the DISTRIBUTE NOW button.

Field Trip to the Museum of Modern Art

SCHEDULE STEP 3

RETURN BY DATE

▼ Add a custom email message (optional)

▼ Schedule a form distribution in the future (optional)

DISTRIBUTION DATE