






## A Teachers Guide to Managing Active Forms

The SchoolSoft Form Manager provides a quick and easy way for teachers and administrators to create, distribute, collect and manage digital forms that require a parent's signature. This guide is written for teachers using the Form Manager and provides an overview of the process of managing active forms.

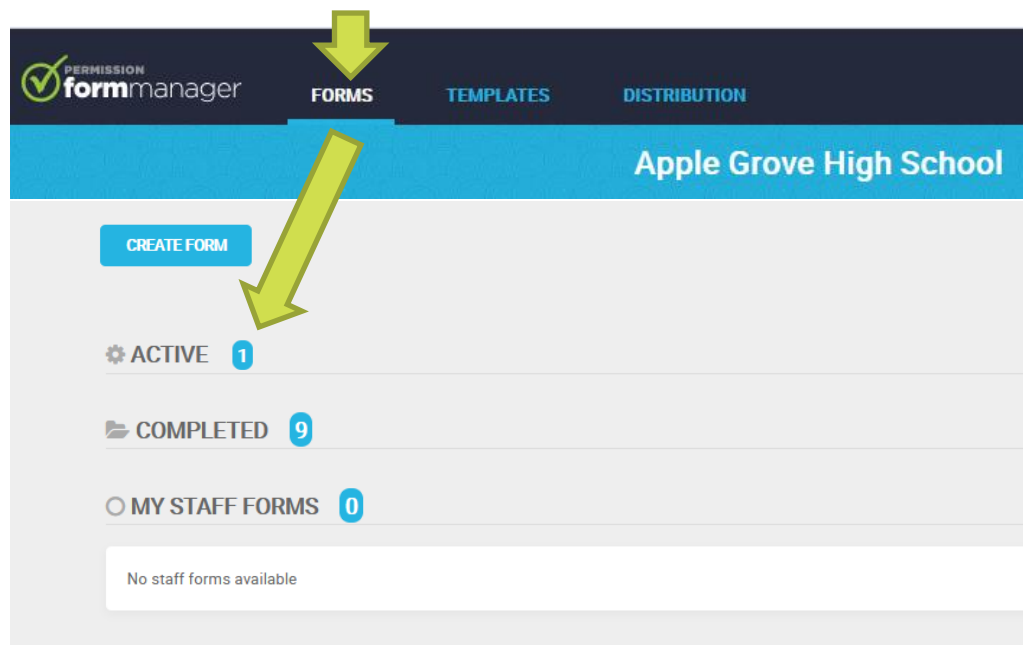
Most pages in the Form Manager have support resources accessible by users. Look for the following icons:

-  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.

### Managing Active Forms

Once a form has been distributed it can be monitored and managed by the distributor of the form, a colleague they have granted shared access to, or a user with System Admin Access. The STATUS page is the area where a form is best managed.

To monitor or manage forms, click the FORMS tab and open the ACTIVE forms group.



After opening active forms, click the OPTIONS button to view the form statistics and to access the following:

- **STATUS** opens the STATUS page for the active form
- **PREVIEW** displays the active form
- **ADD GROUP/STUDENT** allows another group and/or individual student(s) to be added to the active form
- **SHARE** allows you to share access and control of the active form with another staff member
- **COPY** creates a copy of the active form. This is useful if a form applies to another group of students that may be taking the same trip but on a different date.
- **RECALL** If a form was issued in error or otherwise needs to be recalled. When recalled, a form that a parent has not signed is no longer visible. Parents who have signed a form still see the form but it includes a tag indicating it has been recalled.

The screenshot displays a user interface for managing forms. At the top left, there is a gear icon followed by the text 'ACTIVE' and a blue circle containing the number '1'. Below this, the title of the form is 'Field Trip to the Museum of Modern Art'. Underneath the title, there is a small text block: 'Return by - Sep 21, 2021 11:59 PM EDT', 'Updated by Brant Parker', 'Updated - Sep 19, 2021 09:57 PM EDT', and 'Category: Field Trip'. To the right of the title is a green arrow pointing right with the text 'Form stats'. Next to it is a circular progress indicator showing 24 signed, 0 declined, and 2 unsigned. A green arrow points from the 'Form stats' area to an 'OPTIONS' dropdown menu on the right. The 'OPTIONS' menu is open, showing a list of actions: 'STATUS' (highlighted in blue), 'PREVIEW', 'ADD GROUP/STUDENT', 'SHARE', 'COPY', and 'RECALL'. At the bottom left, there is a folder icon followed by the text 'COMPLETED' and a blue circle containing the number '9'.

## The Form Status Page

The Form Status page allows you to view the current status of the form sent to each recipient. The form can be managed using the buttons annotated below.

**Field Trip to the Museum of Modern Art**

Return by - Sep 21, 2021 11:59 PM EDT  
Updated by Brant Parker  
Updated - Sep 19, 2021 09:57 PM EDT  
Category: Field Trip

**STATUS**

Allows form responses to be downloaded to Excel.      24 signed   0 declined   2 unsigned      Displays a blank form that can be printed.

STUDENT	GUARDIANS	SIGNED	DECLINED	UNSIGNED	
Emily Anderson	Keith Anderson	✔			📄 ↻
Jayden Bennett	Charmaine Hofmann	✔			📄 ↻
Caitlin Chow	Bea Chau	✔			📄 ↻
Athma Singh	Raj Singh				📄 ↻ ⚙️

Download a PDF version of a completed form.

Shows is the form needs to be signed by the Guardian (G) and/or Student (S).

Resends the form to all recipients who have not yet signed it.

Resends the form to a specific recipient who has not signed the form.

Recalls and unsigned form for a specific recipient.

Displays the detailed form activity for a specific recipient.