

# Manage Custom Forms on the Counseling Documents Tool

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**Search Terms:** [Documents](#)

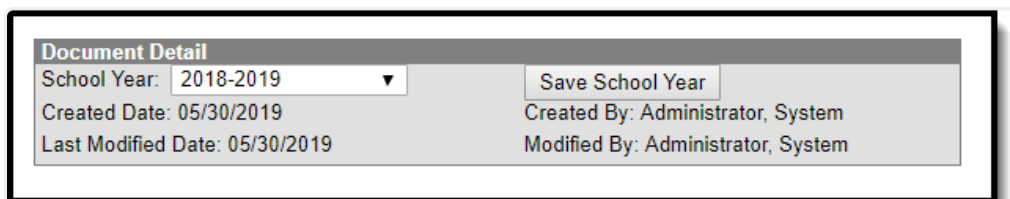
Custom Forms are editable PDF documents used to supplement documents linked to a person's record. Custom forms can be linked to a specific person and prepopulated with data on the person's Documents tool, or accessed outside of the context of a person from the Blank Forms area on the [Forms](#) tool. Examples of custom forms include notices, consent forms, and service specific eligibility forms. Lists of custom forms are available for many states in the [State Specific Information](#) area.

The content of existing custom forms associated with a person will not change when an Administrator changes Ad Hoc mappings on the form in System Administration. See the [Custom Forms](#) article for additional information.

## Custom Forms Document Detail

When a Custom Form is created and saved for a person, the **Document Detail** that appears below the Document list includes a **School Year** field. This date defaults to the date the form was created and determines into which calendar the form will be organized. If the form needs to be organized into a different calendar, the School Year field can be used to move it to a different calendar.

Forms located in the forms folder are organized by the Year and then the Modified Date.



*Image 1: Custom Forms Document Detail*

## Select Prepopulation Data

When setting up a [Custom Form](#), form administrators have the option of mapping Ad hoc fields to editable fields in the form. These mapped fields populate based on the person's data to which the form is attached.

Forms may include multiple fields mapped to the same Ad hoc field, such as reporting a list of team members or behavior events. When the form is created in System Administration, Sequence values are selected for fields in a list. The user creating the form then indicates the order that records should populate in the form. This process is best illustrated with an example.

## Team Members Example

An example form includes a list of a person's team members. When mapping Ad hoc fields to the form, the form administrator aligned TeamMember.lastName and TeamMember.firstName to two fields in a list, with Sequences of 1 and 2. When a user selects the form to add to a person, the first step is to select which records populate in these fields and in what order. Select records from the dropdown list and reorder them as desired by clicking and dragging records.

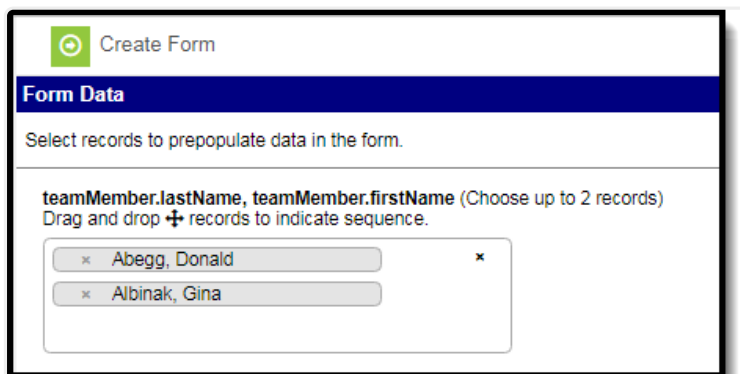


Image 2: Select Records to Prepopulate Data in the Form

Click the **Create Form** button after all selections have been made. In the form, selected records display in the indicated order.

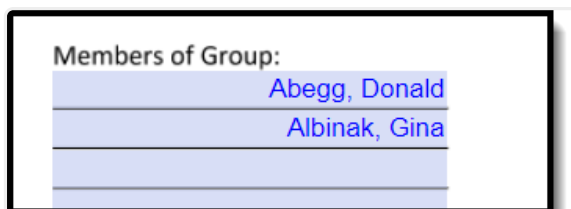




Image 3: Data Prepopulated into the Form

## Complete Form

The **Name** and the **Instructions** display at the top of the form. A warning icon  displays in the upper right corner of the screen if there are any errors, such as missing required fields or overfilled fields. Click this button to navigate through the errors on the form. A checkmark icon  displays after all errors have been fixed.

A draft of the form can be saved with rule errors. However, a draft of the document will not save if there are overfilled fields.

Save Cancel Print

Custom Form - 18-19 Military Connections Survey

**Instructions**  
Certain fields auto-populate based on the person's record, reducing the amount of data entry.

Office of School Administration  
Department of Student Services  
(651)123 - 4567 - example@doe.com

**18-19 Military Connections Survey**

New for the 2018-2019 school year, the Department of Public Instruction is requiring school districts to annually collect information from Military Connected Families. If a parent or guardian is connected to the U.S. Military, we are asking that they answer the following questions and indicate the Military Connected Parent(s)/Guardian(s)' Name(s) and Date of Birth (DOB). Please disregard if this does not apply to your family.  
**Please return the form to your child's school by Friday, October 18, 2018.**

No, parent or guardian in this household is a member of the military.

Yes, this individual is a member of the military.  
Name: Ronald Atwood DOB: 03/31/1978  
Start Date of military service: 01/01/2018 End Date of military service: \_\_\_\_\_

Please indicate the following information about this service member Parent/Guardian in Military.

What is the current status for this service member? Active Duty, Deployed

What is the Branch of Service for this service member? Army National Guard

Image 4: Example of Custom Form with Errors

## Print

When text entered in a multiline text field on a custom form goes beyond the capacity of space on the page, the overflow text displays on subsequent pages when the form is printed. The text on one page ends with the word **Continued** and a **Letter-Number** combination in parenthesis which indicates where the text is continued on another page. See the [Custom Forms](#) article for additional information concerning the overflow functionality.

For example, if a text field ends with "Continued A1," the text is continued on an overflow page labeled **Appendix A1** (see image 5 below). The ellipsis (...) under the Appendix label indicates the text is continued from a previous page.

Blowfish can range in size from 1-inch long (dwarf or pygmy puffer, *Carinotetraodon travancoricus*) to over 2 feet (giant puffer, or *Tetraodon mbu*). These fish do not have scales but instead have spines that are even more formidable after inflation.

Blowfish eyes move independently from one another. The fish have a prominent beak with four teeth that allow them to eat algae, crustaceans, mollusks and red worms. It is these teeth that give rise to the "Tetraodontidae" (continued A1)

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**Kaiser, Branson L**  
**Prior Written Notice**  
**Appendix A, Page 1 of 1**

**Appendix A1**

...

name: tetra (four) and dontinidae (teeth). Blowfish can range in size from 1-inch long (dwarf or pygmy puffer, *Carinotetraodon travancoricus*) to over 2 feet (giant puffer, or *Tetraodon mbu*). These fish do not have scales but instead have spines that are even more formidable after inflation.

Image 5: Overflow Print Example

The maximum capacity for each overflow text field is 1 MB, with a maximum of 4 MB per form.

## Overflow Setup

When creating the form in Adobe Acrobat Professional, the multiline option must be selected under Text Field Properties. The Overflow checkbox must also be marked in System Administration. See the [Custom Forms](#) documentation to learn about Custom Form setup.

## Print Draft Custom Forms

A Draft watermark displays when printing Custom Forms in a draft status.

You are invited to attend a meeting to plan for          (Student's Name) s education program. The meeting will be at          on          at          Room Number - Building - Address

Time          Date          to meet.

Please allow for          to meet.

The purpose of this meeting is:

The following persons are expected to attend:

Name	Title	Name	Title

A member of the IEP team may be excused from attendance at the meeting, in whole or in part, if the district and the parent(s) agree, in writing, that their attendance is not necessary because their area of the curriculum or related services is not being modified or discussed in the meeting. However, you and the district may excuse a member from attendance, in whole or in part, when their area of the curriculum or related services are involved, if: 1) you and the district agree, in writing, to the excusal, and 2) the excused member submits, in writing to you and the rest of the IEP team, input into the development of

Image 6: Draft Custom Forms

