Request Custom Form eSignatures

Last Modified on 01/21/2026 10:14 am CST

Tool Search: Forms

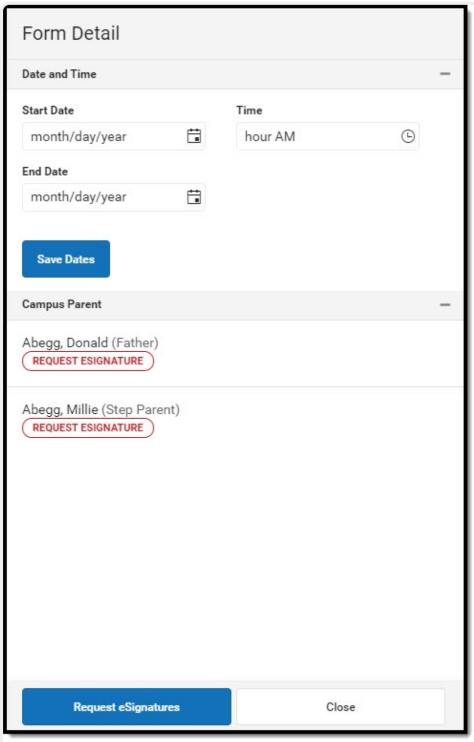
This guide explains how to send a custom form to the Campus Parent and/or Student Portal for an electronic signature (eSignature). This could include permission slips, behavior or health notices, or other supplemental documentation that requires parent/guardian(s) and/or student signature(s).

Before you start

- An administrator must set up the custom form accurately and ensure both the student and their parent/guardians have active Portal accounts. See the Custom Forms on Portal Process article for specific details.
- Users must also have the appropriate tool rights to enter student forms. See the Forms Tool Rights article for more details.

Request custom form eSignature(s)

1. Click **New** to create a new form for the student.
2. Enter data into the form and click **Save and Stay** to remain in the edit view for the form.
3. Click the **Review Participants** button. The Form Detail side panel opens on the right of the screen.
4. Optional: Select a **Start Date** and **Time** when the form is available on the Portal, after eSignatures have been requested.
5. Optional: Select an **End Date** when the form becomes read-only on the Portal.
6. Click **Request eSignatures** or **Cancel**. Requesting eSignatures makes the form read-only. You cannot make additional changes after requesting signatures.



Form Detail Side Panel (300)

After the eSignature Request(s) have been sent, the Review Participants button can be used to view the status per person, override eSignatures, and/or enter a contact log record. Statuses include:

- Signed: The person signed the form.
- Declined: The person declined the form.

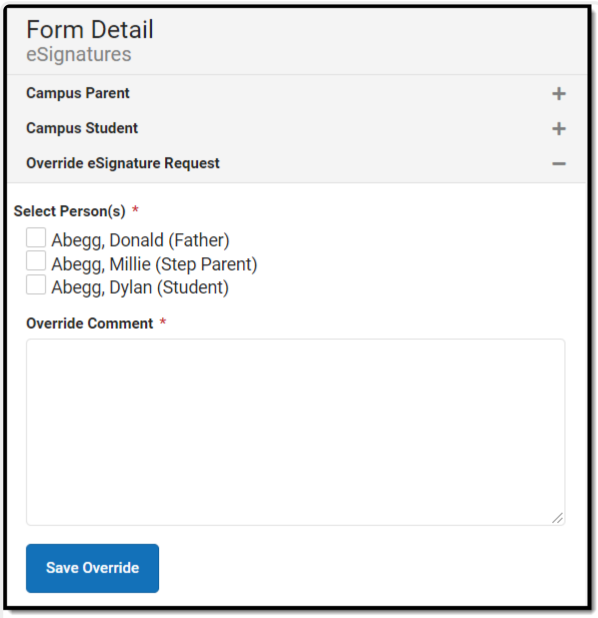
- Pending: The form is awaiting action by the person.
- In Progress: The person is currently editing the form. If a person has an In Progress status, their signature cannot be overridden.
- Overridden: The teacher has overridden that person's signature.

Override eSignature request(s)

The Override eSignature Request option forces the eSignature to be signed so the form can be completed. This option can be used if, for any reason, a parent/guardian or student is unable to eSign, or a paper form is signed and submitted instead of the virtual form.

Overriding eSignatures requires a separate tool right. See the [Forms Tool Rights] article for additional information.

1. Click **Review Participants** after the eSignature request(s) have been sent.
2. Mark the checkbox for the person whose signature is to be overridden.
3. Enter an **Override Comment.**
4. Click **Save Override.** The Status of this form after the user completes the form is "Locked & Overridden."

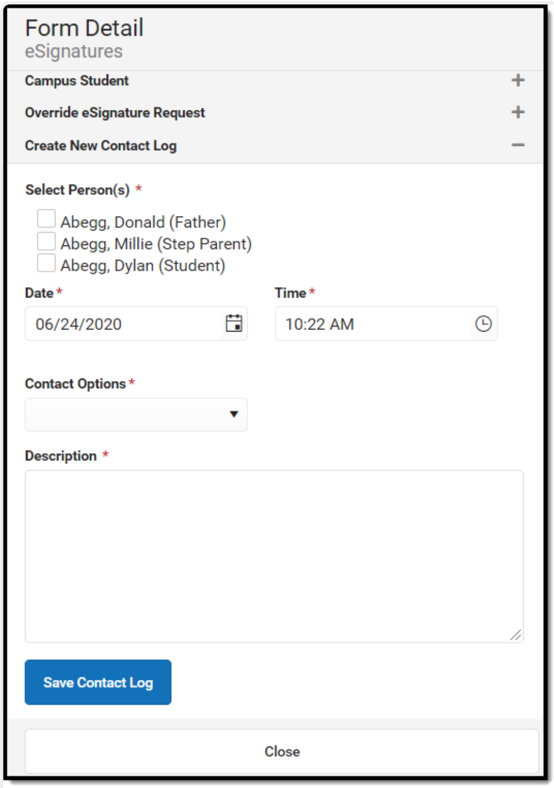


Form Detail Override eSignature Request section (Default)

Enter an eSignature contact log record

The Create New Contact Log section of the Form Detail side panel documents interactions between participants in the custom form.

1. Click **Review Participants** after the eSignature request(s) have been sent.
2. Mark the checkbox for the person who was contacted.
3. Select the **Date** and **Time** when the contact occurred.
4. Select the **Contact Options** from the dropdown. This dropdown is populated from the Attribute Dictionary > ContactLog > Contact Type.
5. Enter a **Description** of the communication.
6. Click **Save Contact Log.** Multiple Contact Log records can be saved per form. Contact Log records can be created any time after the eSignature request(s) have been sent, including after the form is completed.



Create New Contact Log Record Section (350, 400 was almost the same as the default)

What's next

- Complete the custom form after receiving signatures from the parent/guardian(s) and/or students. Click the **Complete** button to finalize the form.
- If a user declined the Terms and Conditions for eSignature or declined to sign the form, follow your district and/or school policy for sending a paper copy of the form.