

# Create a Term Section Custom Form Batch

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Tool Search: Form Batch Setup

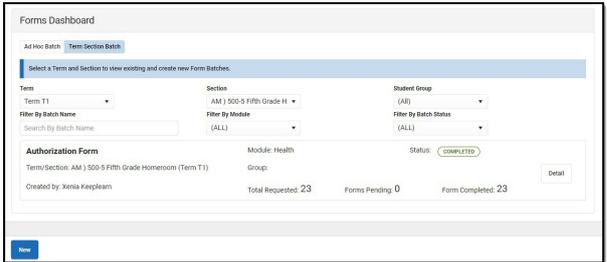
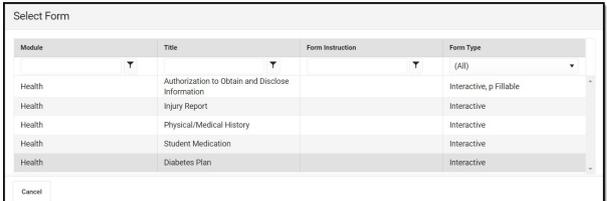
This guide explains how to use the Term Section Batch option to send a Custom Form to a group of students in the same course section. Form Batches are school and calendar-specific.

## Before you start

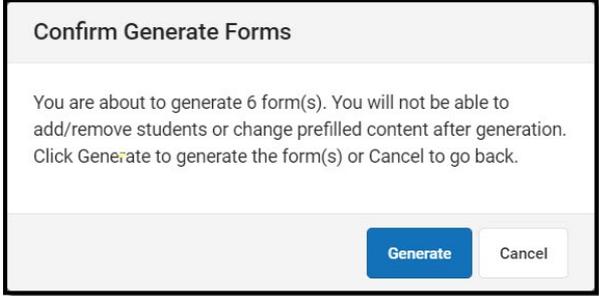
- Upload PDFs with the [Custom Form Setup](#) tool.
- Form Batch Setup Tool Rights must be assigned.

## Create a new Term Section Batch

This guide explains how to create a Custom Form Batch using the Term Section Batch option.

Step	Image <i>Click to enlarge</i>
<p>1. Select the Form Batch option <b>Term Section Batch</b>.</p>	
<p>2. Click <b>New</b> to create a new batch. The Select Form screen displays.</p>	<p>N/A</p>
<p>3. Choose a form to associate with the student(s). The Prepare Form screen displays.</p>	

Step	Image <i>Click to enlarge</i>															
<p>4. Enter a <b>Name</b> for the batch and any information into the fillable fields. Any data entered on the Prepare Form screen applies to ALL student forms.</p>																
<p>5. Optional: Mark the <b>Show Field Detail</b> checkbox to view additional information about each field upon hover.</p>	<table border="1"> <thead> <tr> <th>PROPERTY</th> <th>VALUE</th> <th>EDIT LOCATION</th> </tr> </thead> <tbody> <tr> <td>Number of Characters</td> <td>0 Char</td> <td>This Field</td> </tr> <tr> <td>Ad Hoc Fields</td> <td>Set</td> <td>Prepopulate Fields Tool</td> </tr> <tr> <td>Rules</td> <td>Not Set</td> <td>Define Rules Tool</td> </tr> <tr> <td>Field Type</td> <td>Text</td> <td>PDF</td> </tr> </tbody> </table>	PROPERTY	VALUE	EDIT LOCATION	Number of Characters	0 Char	This Field	Ad Hoc Fields	Set	Prepopulate Fields Tool	Rules	Not Set	Define Rules Tool	Field Type	Text	PDF
PROPERTY	VALUE	EDIT LOCATION														
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<p>6. Click <b>Save</b> to save progress and remain on the screen, or <b>Save &amp; Next</b> to save and proceed to the next step. The Add Students screen displays.</p>	<p>N/A</p>															
<p>7. Select students to add to the batch:</p> <ul style="list-style-type: none"> <li>• Click <b>Add All</b> to put all students into the batch.</li> <li>• Select an individual student's name.</li> </ul>																

Step	Image <i>Click to enlarge</i>
<p>8. Once the desired students are selected, click <b>Save</b> to save progress and remain on the screen, or <b>Generate Forms</b> to save and proceed to the next step. A pop-up displays the number of forms that will be generated and warns the user that, once generated, students cannot be added/removed from the batch, and prefilled content cannot be modified.</p>	
<p>9. Click <b>Generate</b> to create the batch forms, or <b>Cancel</b> to go back.</p>	<p>N/A</p>

## Impact

- Once the batch is generated, the Custom Form is assigned to the students on the [Forms](#) tool.
- Alert any staff who may need to fill out the form for students in their course section.
- Additional administrative setup can be done after creating the form batch, including setting a Start Date/Time and End Date, requesting eSignature, locking, completing, printing, and deleting.

## Check Form Batch Status

The **Check Status** screen is used to view the status and make edits to the forms. All functions available in the [Forms](#) tool can also be performed on this screen, along with additional batch functions that can be applied to all forms. These include setting a Start Date/Time and End Date, requesting eSignature, locking, and completing forms. Individual forms can be edited independently of the batch, including setting separate Start and End Dates.

## Print Batch Forms

Individual student forms can be printed on the **Check Status** screen by opening an individual document. Forms can also be printed in batches by clicking the **Print** button. The down arrow on the Print button allows users to print a batch of forms with a specific status.



## Delete eSignature Form Batch

Batches for eSignature forms can be deleted from the **Prepare Form** screen. Once a form has been sent to the Portal, the batch cannot be deleted. Portal-only and non-Portal forms can be deleted at any time.

## Complete Batch Forms

Once the batch is generated, the forms can be completed individually and as a batch the same way they can be completed on the Forms tool. See the [Complete Forms](#) section on the Forms tool document for additional information.

Click **Complete Forms** to complete all applicable eSignature forms. Click the **Lock & Publish** button to complete Unlocked forms.

## What's next

- Users can edit a student's individual Custom Form in the [Forms](#) tool.
- **Should my subtasks be in the What's next section?**