Completing Online Forms in Family Access

Online Forms are used to collect and update information. Each online form is a process made up of steps to ensure the information the District has on file is accurate and up to date. An example of an online form is a registration form for the new school year. A parent or guardian completes this form to verify information such as email addresses, addresses, and medical history. You can start a form and return to it later. Any information that has been saved or completed will be there when you return to the form. Each step in an online form displays on a unique screen.

Submitted forms are reviewed by an administrator at the district. If the reviewer denies the form due to incomplete information, you receive a notification about the issue, must update the information, and resubmit the form.

Scroll past the video to access the step-by-step instructions.

Note:Skyward does not have access to your information. The various areas you have access to within the software are based on configurations set by your system administrator; please contact your child's school with questions.

Audio Transcript

Online forms are an easy way to communicate with your child's school about important topics like demographics information, permission for field trips, and student registration. For this video, let's walk through a registration form to show you how to complete online forms. Any available online forms will appear on our home screen. Forms will be named based on the name given to the online form when it was created. For this example, we'll select the registration form to begin. Based on how this online form was created, we'll see specific screens that will enable us to navigate through this form. For this example, we see the welcome screen and can read through the instructions as needed. At the left of the screen, we see the steps we need to complete. To begin, we'll click Start. Our first step for this form is verifying or updating family information. The Home Language field is correct and can be left as is. Under the Guardian #1 heading, we can update the Relationship, Custodial Guardian, Allow Student Pickup, and Driver's License Number fields if needed. Since everything is still correct, we'll scroll down. For this example, we want to add a second phone number for our home phone. Let's select the correct phone type and then enter the phone number. Let's scroll down again to review email information. We've recently updated our email, so let's update that information now. If we wanted to save this online form and submit it at a later time, we could select the Save & Exit option. No other information is needed on this screen. We'll click Complete & Next. The next step in our process is to provide proof of residency. We can select or drag and drop our desired file from our computer. Once loaded, we'll see our file display. We could enter a description if needed. For our example, we'll leave it as is and click Complete & Review. On this screen, we'll scroll through the form to verify that all the information we've entered is correct. If certain fields need to be updated again, we could click the Edit options next to the heading. Once everything is correct, we'll check the box to confirm that all of the above information has been entered to the best of our ability. Lastly, we'll click Submit Form and return to our dashboard, where we can see that the form we just submitted is now pending for approval. As a guardian, you can now update student information through an online form to make sure your child's information is up to date.

Watch the video:https://player.vimeo.com/video/877483974?h=d0b5afac69

1. Sign in to the software using your assigned username and password.

Step Information

If you have access to more than one portal, you may need to click the icon next to the icon and select **Family Access** from the *Home* drop-down menu.

Expected Result

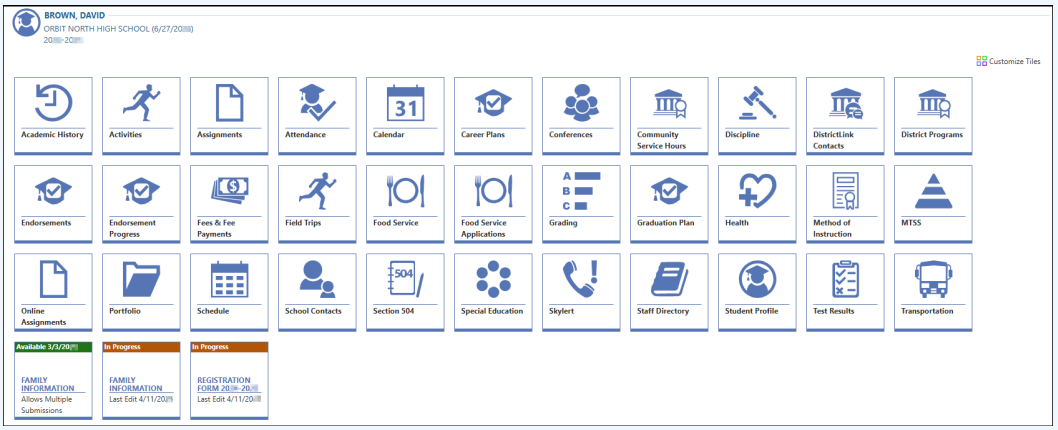
You see the *Family Access* tile screen, where you can view tiles for all of your children.

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2. Click the desired online form tile.

Step Information

The name of the tile displays as the name of the online form. For example, a form for registering students for the new school year may display as Registration Form. The status of the online form also displays as a banner and indicates whether the online form is available, in progress, pending approval, or denied.



Online forms are specific to each student and must be selected for each individual student.

Expected Result

You see the *Online Form* screen, which displays the instructions for the form or Step 1 of the form, depending on how the form is configured.

If you see the instructions, continue to the next step.

If you see Step 1 of the form, skip to step 5.

3. Carefully read all instructions included on the initial screen for the online form.
4. Click **Start** to begin completing the online form.

Expected Result

You see the first screen of the online form.

5. Complete the fields for each step as necessary.

Step Information

If you make a change to a field on one step, then click another step using the navigation options near the left of the screen, the information is saved, but the step you were on is not marked as complete.

6. Click **Complete & Next** near the top of the screen once you are finished entering information.

Step Information

Alternatively, if you wish to return to a previous step, you can click **Previous** near the top left of the screen. You can also click **Save & Exit** to save the changes you made and return to the previous screen.

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If the form only has one step and includes the review page, skip to step 8.

If the form only has one step and does not include the review page, skip to step 10.

A icon displays in each step you complete to denote the successful completion status of the step. You must successfully complete each step in order to submit the online form.

7. Complete all required steps for the online form.

Step Information

Some districts may include optional steps in online forms.

If the form includes a review page, continue to the next step.

If the form does not include a review page, skip to step 10.

8. Click **Complete & Review** at the top of the final required step.

Step Information

The Complete & Review option also displays at the top of any subsequent optional steps.

Expected Result

You see the *Online Form Review* screen, which displays the details of each completed step of the online form.

You can modify information for a step by clicking the icon at the right of the screen beside the appropriate step.

9. When you have reviewed the information entered for each step, check the box at the bottom of the listed steps to confirm all the above information is correct.

Step Information

Checking this box is required in order to submit the online form.

10. Click **Submit Form** near the top of the screen.

Expected Result

If configured administratively, you see a confirmation message indicating your information has been submitted. You can also click **Return to Dashboard** beneath the message to return to the *Family Access* home screen. If there is no confirmation message configured for the form, you return to the *Family Access* home screen.

If you wish to review completed online forms, you can navigate to MENU > **Family Access** > **Online Form** and select **My Online Forms History** under *Features*. Then, you can click **Review** to the left of the form you wish to review. Only forms with a status of Approved or Auto-Approved will be available for review.

You have successfully completed and submitted an online form in *Family Access*.

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