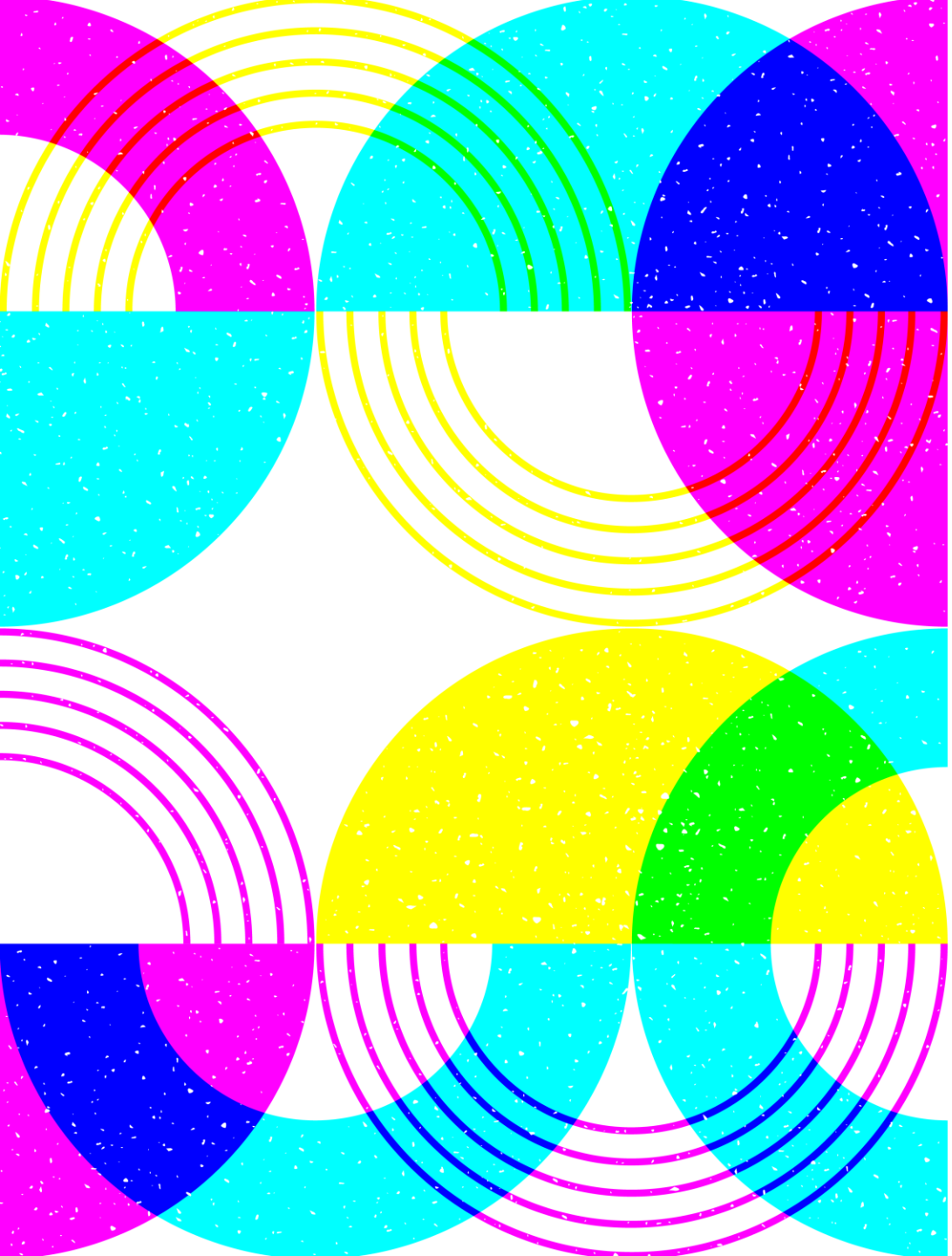


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Forms That Do More

Ali DeGeorge – Product Line Manager
Kaila Durnan – Solutions Engineer

SIS Mic Drop Moments

- Can’t make it to the final session, or not always comfortable speaking up in a group?We still want to hear from you! Please take a moment to complete this survey. We’ll review the results before the SIS MIC Drop sessions on Friday morning.



Agenda

What are forms and why would I use them?

Form Types

Student Form Breakdown

- Templates
- Defaulting
- Editor
- Fields
- Relationships
- Syncing

Demo

Where do we go from here?



What are forms and why would I use them?



Why Forms



- Schools rely on accurate, consistent, and timely information from families and staff.
- Online Forms are great for basic collection, but districts often need state-aligned, multi-page, legally consistent documents.
- Forms close that gap by allowing districts to build forms that:
  - Match state layouts
  - Maintain multi-page visual formats
  - Include signatures, versioning, effective dates, and two-way data syncing
  - Templates can be customized per student

Student Forms aren’t just forms — they are official student documents with automation, data integration, and administrative workflows behind them.

Online Forms versus Forms

Feature	Online Forms	Student Forms
Where they live	Student Profile > Online Forms	Student Profile > General > Student Forms
Who fills them out	Guardians via FA	Guardians or **administrators**
Form packets	❌ Not supported	✅ Yes — group multiple forms together
Use cases	General data collection	*Official documents* (IEP addendums, transportation plans, health plans)
Visual layout	Basic, web-based	Fully custom, multi-page, state-aligned
Data sync	Skyward Push	**Two-way sync** (pull/push Skyward data)
Status + approvals	Minimal	Work in Progress → Waiting for Approval → Approved → Locked → Completed
Security	Uses standard role permissions	**Dedicated Student Form Security** (required for publishing)

If you need a document attached to the student record or one requiring administrative completion, approval, or signature, you need Student Forms — not Online Forms.

Form Types



Special Education Forms

Requires Special Education License:	Available In: WI, PA, MI, IL, WA Coming Summer 2026: KS, RI Special Education > Forms
State-Required Forms	Skyward created and maintained Each form can be cloned and customized by district
Form Types	Evaluation, IEP, Assessment, Student •Controls the base objects that you're able to select fields for
Form Groups	Create a grouping of forms with the same type to automatically assign to students.
Student Services & Family Access	Reviewing, Completing, Electronic Signatures, Viewing Status Updates
Administrative Experience	Approvals (Work in Progress → Waiting for Approval → Approved → Locked → Completed) Manual Sync before Skyward data is updated (protects data accuracy) Audit Trails + revision history

Section 504 Forms

Part of Core Product

Available In: WI, PA, MI, IL, WA, IN, TX, RI

- Coming Summer 2026: KS
- Section 504 > Forms

State Required Forms

Skyward created and maintained

- Each form can be cloned and customized by district

Form Types

Evaluation, IAP, Assessment, Student

- Controls the base objects that you're able to select fields for

Form Groups

Create a grouping of forms with the same type to automatically assign to students.

Student Services & Family Access

Reviewing, Completing, Electronic Signatures, Viewing Status Updates

Health Forms



- Health → Health Plan Forms
- Form Types
  - EAP — Emergency Action Plan
    - Designed for urgent, time-sensitive medical situations requiring immediate response.
  - IHP — Individual Health Plan
    - Ongoing and comprehensive plans for managing a student's long-term health needs.
- Attached to Student
  - Student Profile > Health Plans > Health Plan Record

Student Forms

Form Types

- Student
- Student > Form

Assigning Forms

- Individually from Student Profile
- Mass Add Utilities
- Scheduled Tasks (for automated assignment)

Guardian Experience in FA

- Viewing
- Completing
- Electronic signatures
- Seeing status updates

Administrative Experience

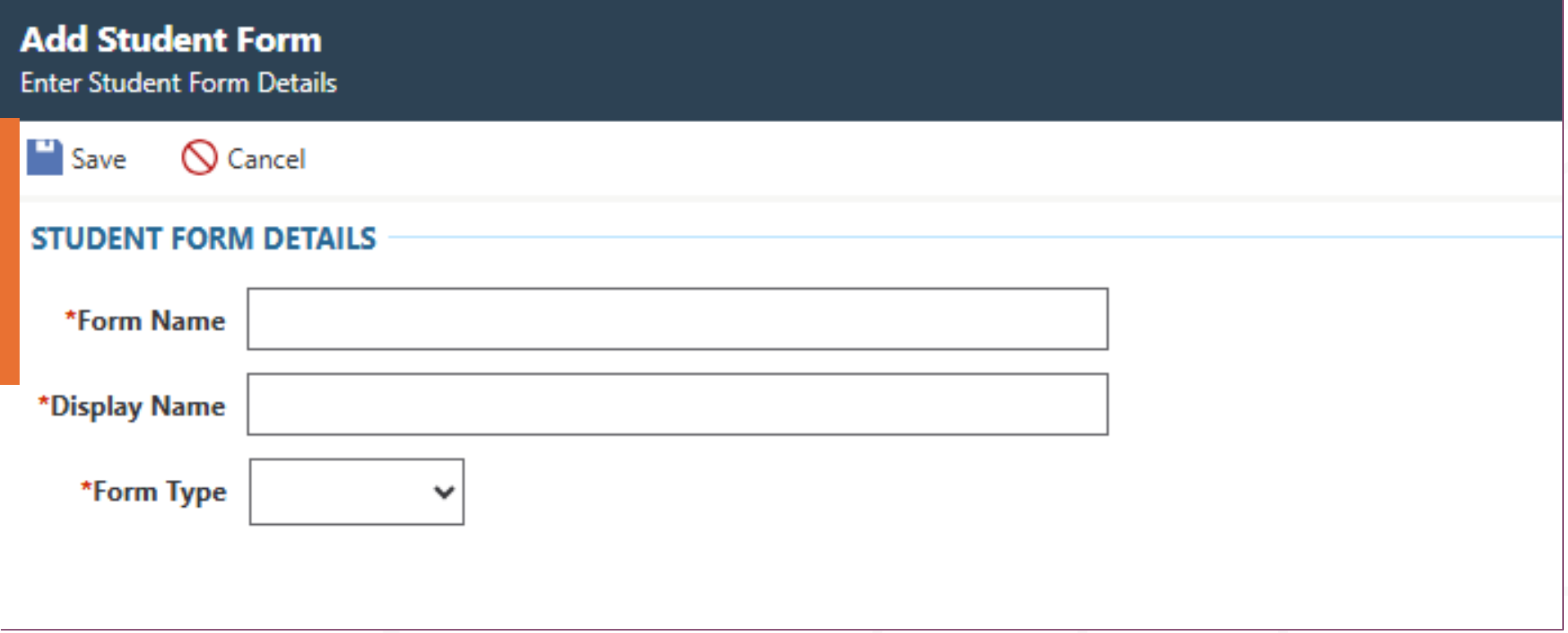
- Approvals (Work in Progress → Waiting for Approval → Approved → Locked → Completed)
- Manual Sync before Skyward data is updated (protects data accuracy)
- Audit Trails + revision history

Notifications

- Guardian Signature Needed
- Student Form Waiting for Approval
- Student Form Approved
- Notifications can be cloned for faster setup

Student Form Breakdown

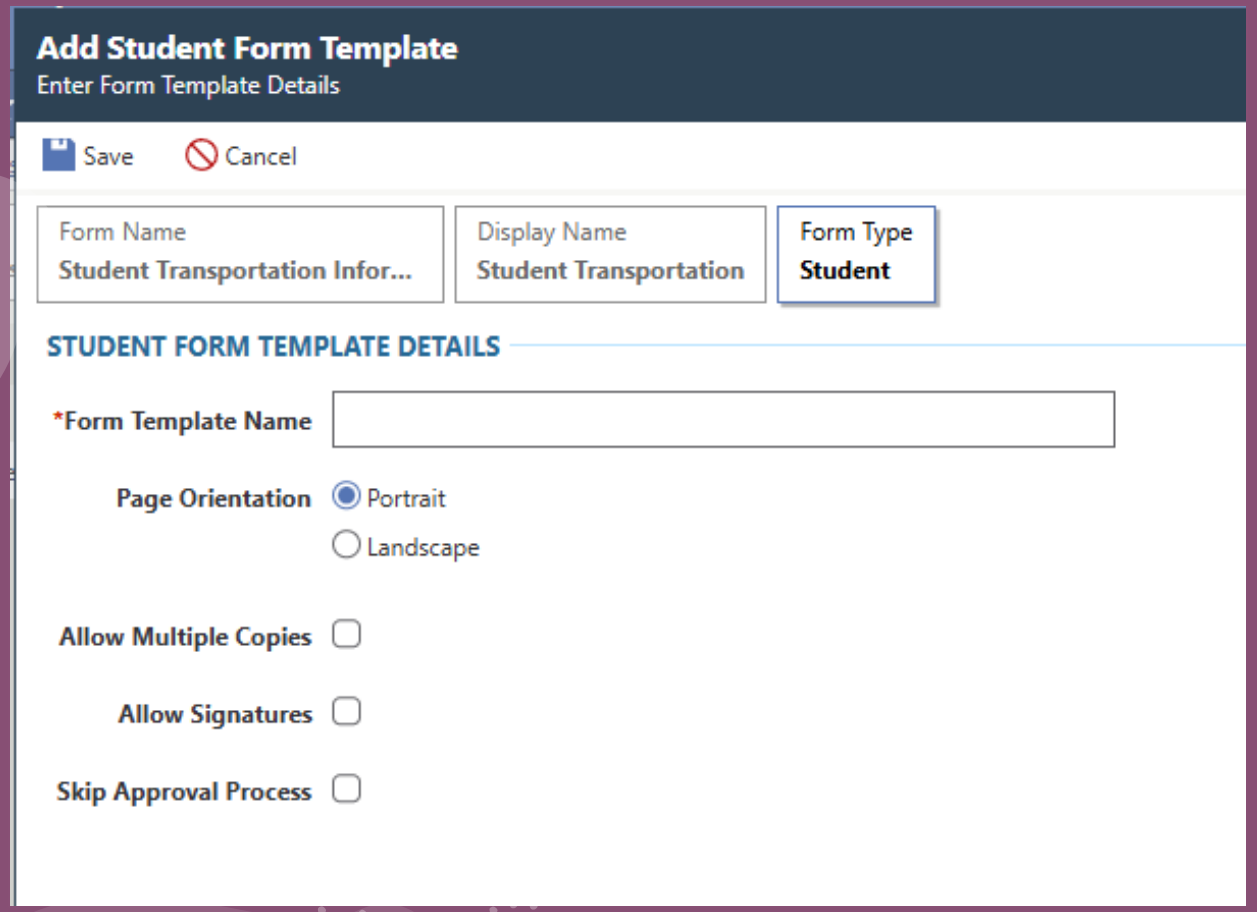




Adding Form

- Student > Forms
- Think of this as your ‘parent’ form

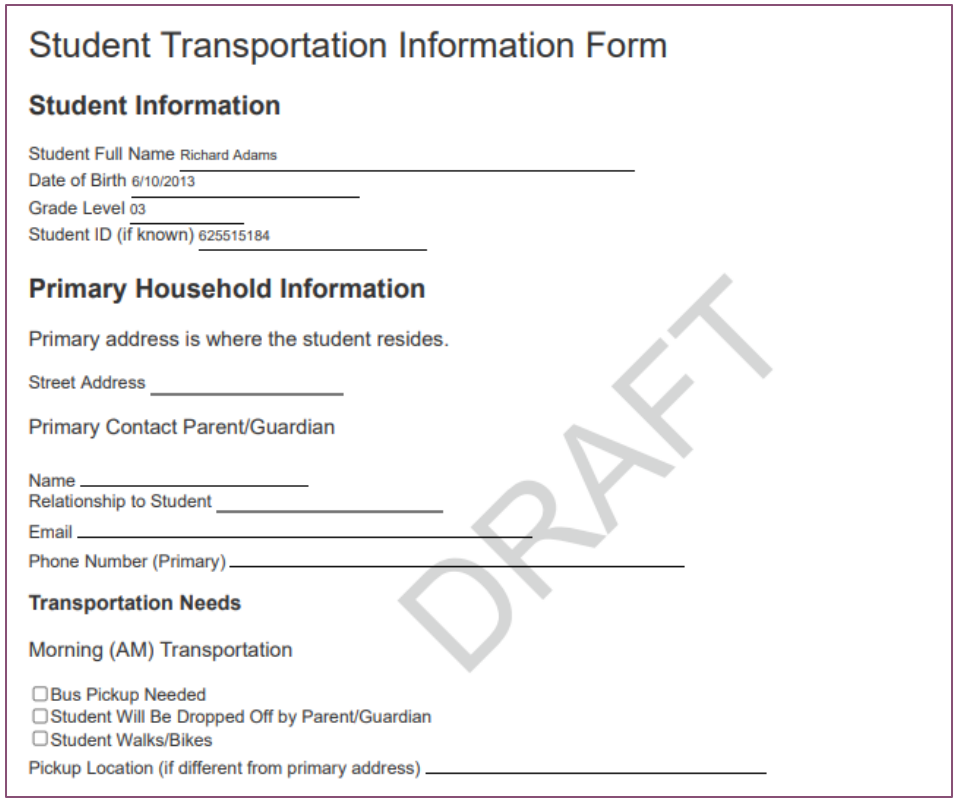
Form Templates



- Form Templates allow you to manage form versions without overwriting existing forms.
- Templates help you:
  - Update forms without modifying those already in use
  - Maintain historical versions
  - Test changes safely before publishing
  - Clone existing templates for quick revisions

Print Without Watermark

- Print Without Watermark removes the DRAFT watermark when printing forms before they are marked complete.
- Use this when:
  - Staff need to print in-progress forms for meetings
  - A draft watermark would cause confusion
  - Forms must be reviewed or shared before final approval
- Leaving it unchecked ensures:
  - The system automatically marks incomplete forms as DRAFT
  - Easily tell the form is not finalized



Student Transportation Information Form

Student Information

Student Full Name Richard Adams
Date of Birth 6/10/2013
Grade Level 03
Student ID (if known) 625515184

Primary Household Information

Primary address is where the student resides.

Street Address

Primary Contact Parent/Guardian

Name
Relationship to Student
Email
Phone Number (Primary)

Transportation Needs

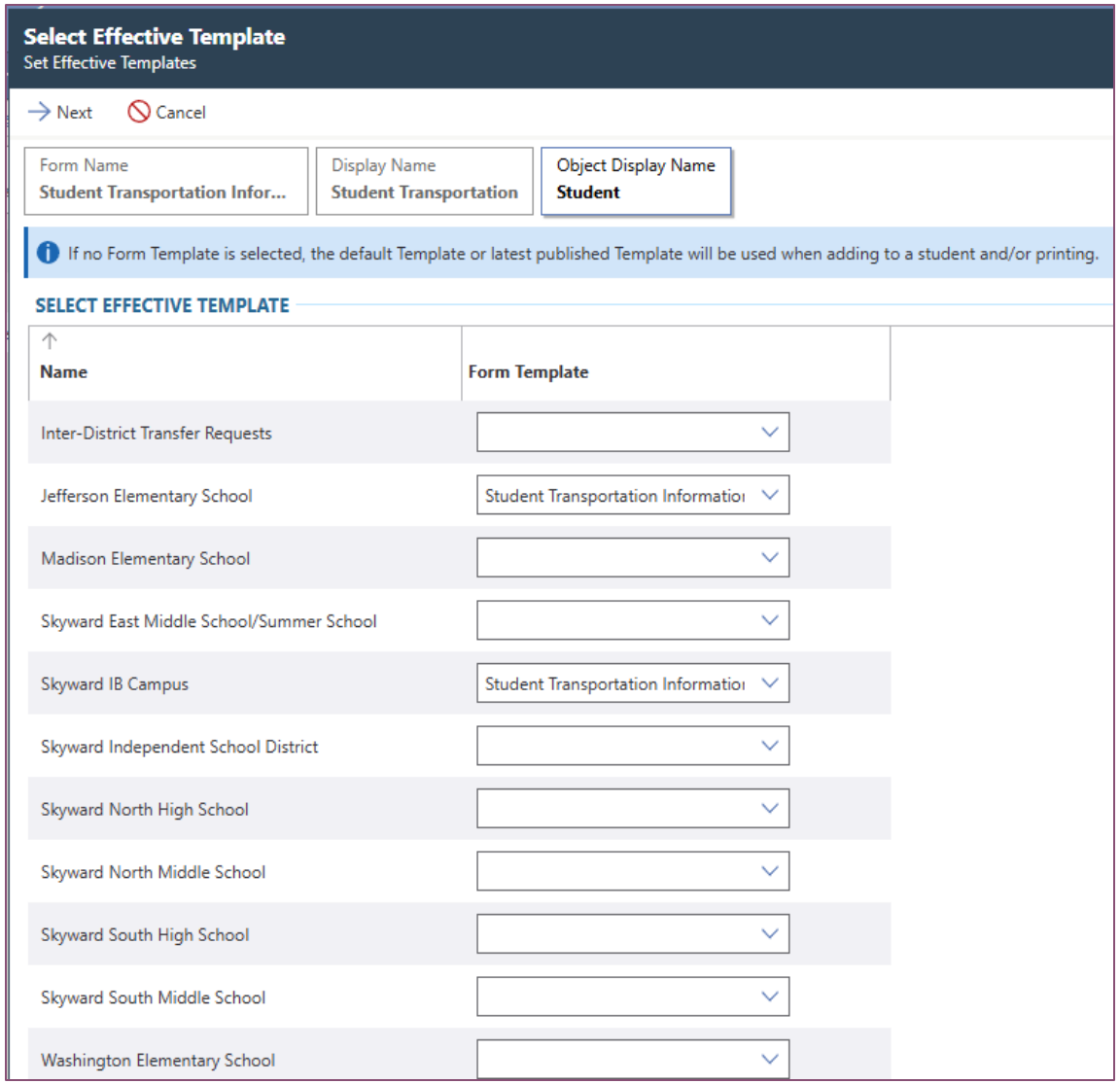
Morning (AM) Transportation

☐ Bus Pickup Needed
☐ Student Will Be Dropped Off by Parent/Guardian
☐ Student Walks/Bikes
Pickup Location (if different from primary address)

DRAFT

Defaulting Forms

- The Default Template is the version that appears automatically when:
  - Adding the form to a student record
  - Printing the form from the student profile
  - Administrators quickly select templates during mass tasks
- Set Effective Template Per Entities
  - Assign different default templates to different entities
    - High schools and elementary schools use different versions
    - Student Services teams use entity-specific layouts
    - Health, counseling, or athletics departments require variations

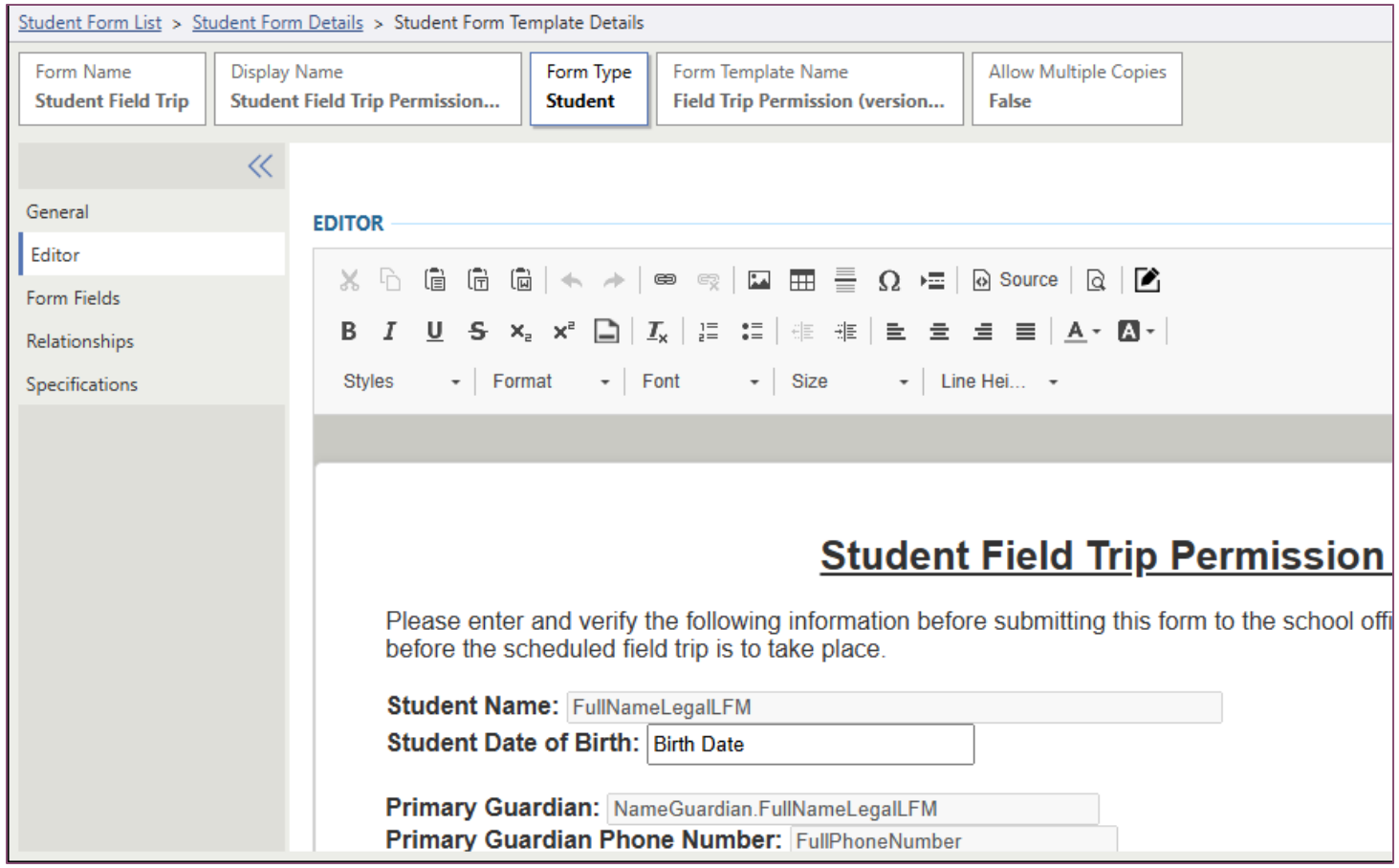


Editor

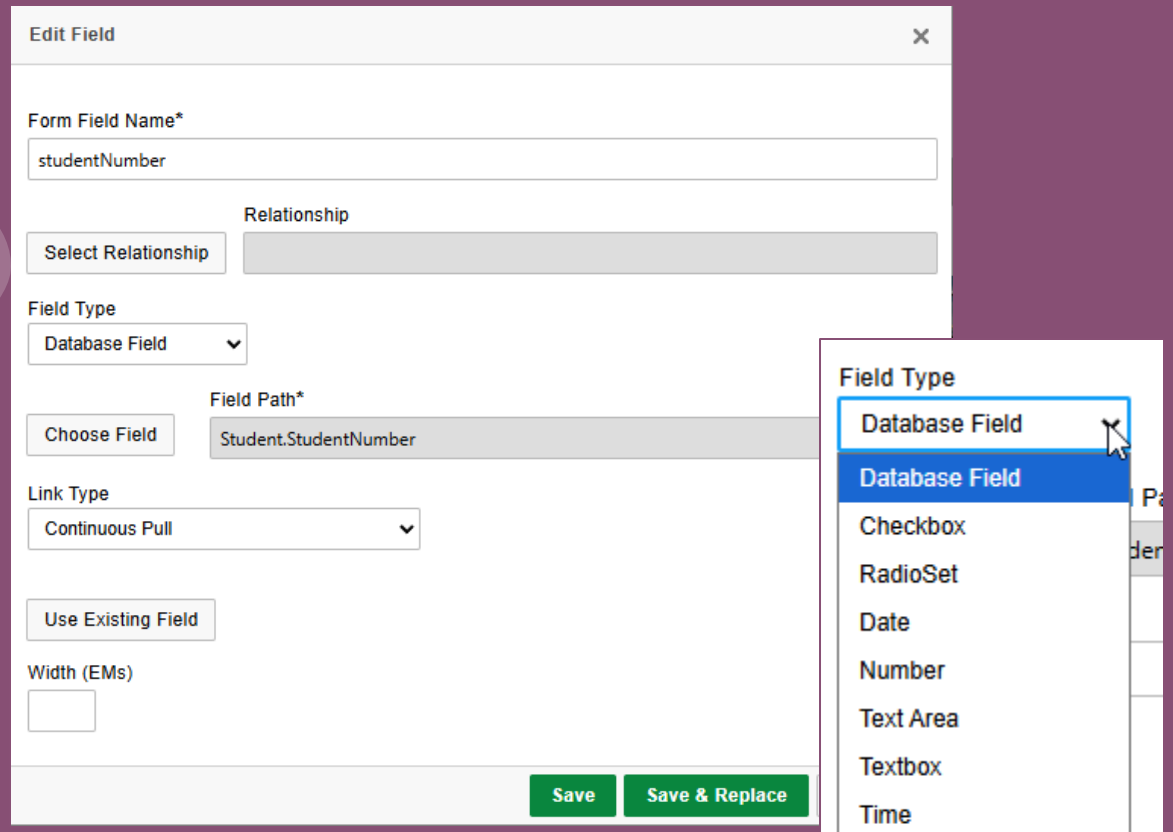
- The editor enables you to:
  - Modify the layout and design
  - Add or adjust fields
  - Build dynamic sections
  - Create clean, readable, professional forms

⚠️ Important:

- Once a form template is published, it cannot be customized.
- To make changes, you must clone the template and edit the clone.



Field Types & Data Linking



- Select Relationships – coming up next!
- Field Types:
  - Customize the form with the fields that you need.
- Link Type:
  - Pull Once
    - Pulls system value into form when form is first added to the student.
  - Continuous Pull
    - Always reflects the latest system data every time the form is opened, up until the form is approved.
  - Continuous Pull and update Skyward
    - Same as above; however, allows the form taker to make changes to system data.

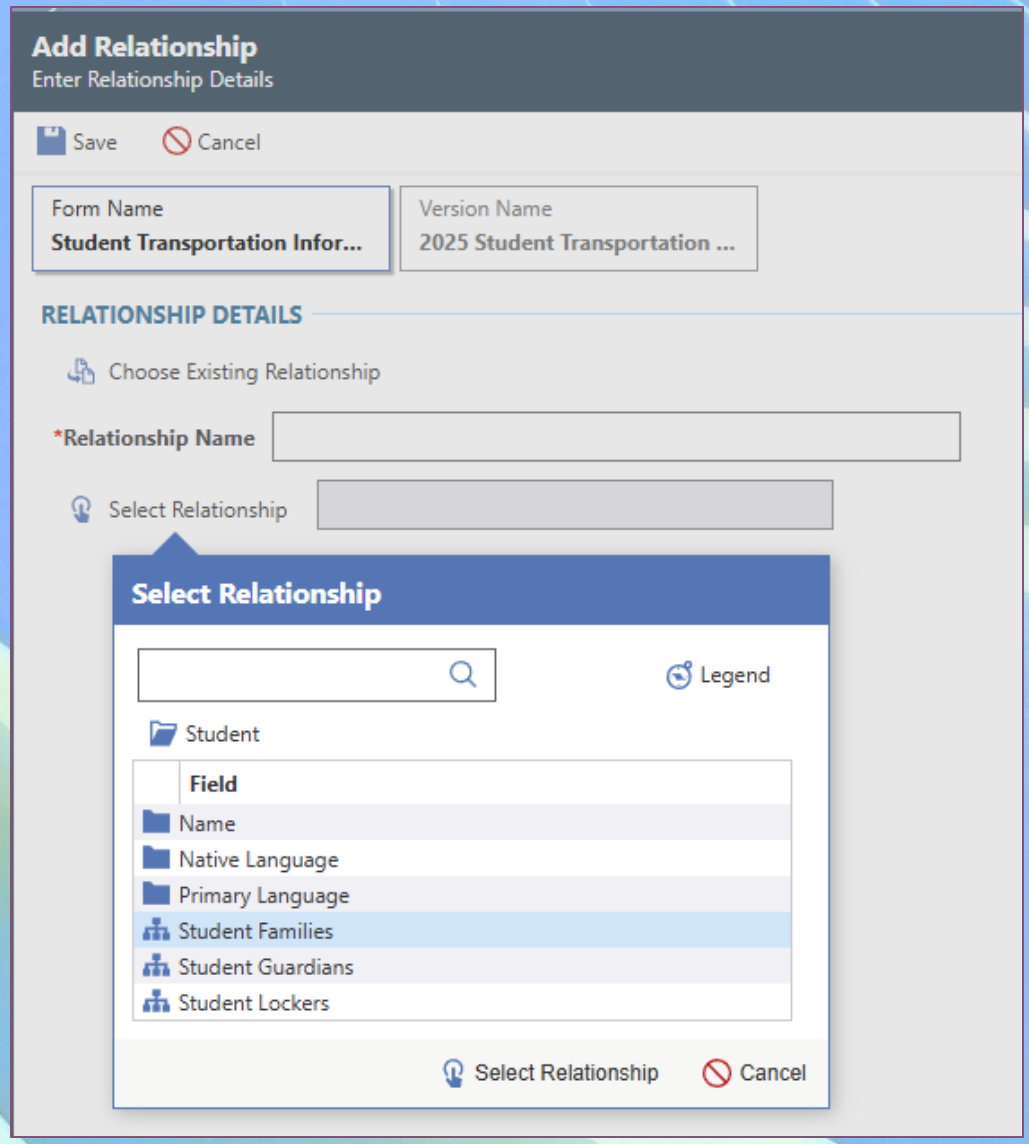
Understanding Form Relationships

Relationships allow your form to connect to data outside the base form, such as:

- Guardians
- Guardian phone numbers
- Other student-linked records
- Freeform repeated rows

They enable:

- Auto-pulling Skyward data
- Repeating rows (Relationship Numbers)
- Linking tables, lists, and multi-record structures



Managing Relationships

- You configure relationships in:
  - Form Template → Relationships Tab
- From here, you can:
  - Add new relationships
  - Bind fields to those relationships
  - Review or edit existing relationship structures



Creating a Freeform Relationship

Use this when you want repeated custom rows not tied to Skyward data.

Steps:

1. Open Relationships tab → Select Add Relationship.
2. Give it a unique name.
3. Leave the Relationship unselected to keep it freeform.
4. Add or copy/paste fields in the Editor.
5. Assign Relationship Numbers to each row (1, 2, 3…).
6. Use Save & Replace when creating new instances of fields.

Setting Up a Relationship to Guardians

- Use this when you want guardian data (names, phones, emails) to auto-populate.
- Steps:
  - Go to Relationships tab → Add Relationship.
  - Choose Student → Student Guardians from the selector.
  - Save the relationship.
  - This adds access to all guardian record fields.

When to Use Which Relationship Type

Freeform Relationships

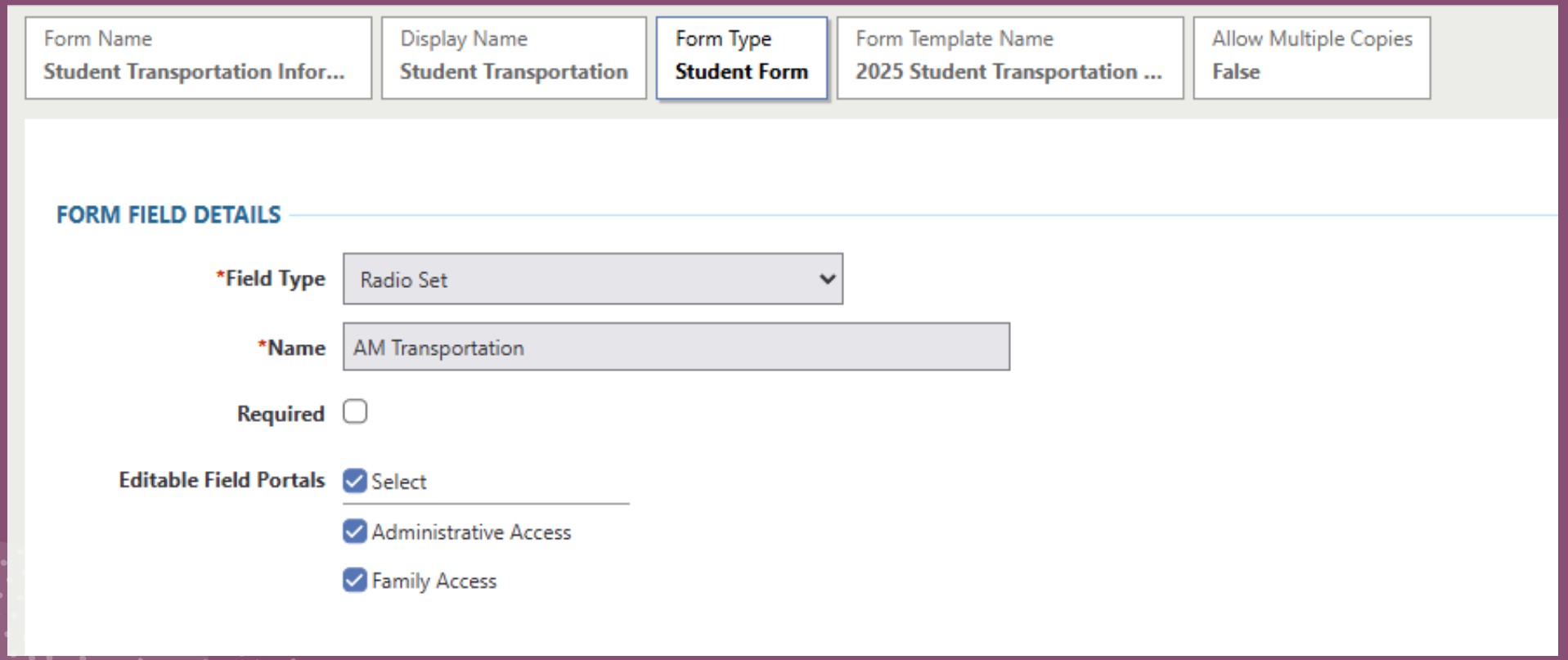
- Custom repeated rows
- Not linked to Skyward data
- Great for SPED service lists, accommodations, narrative grids

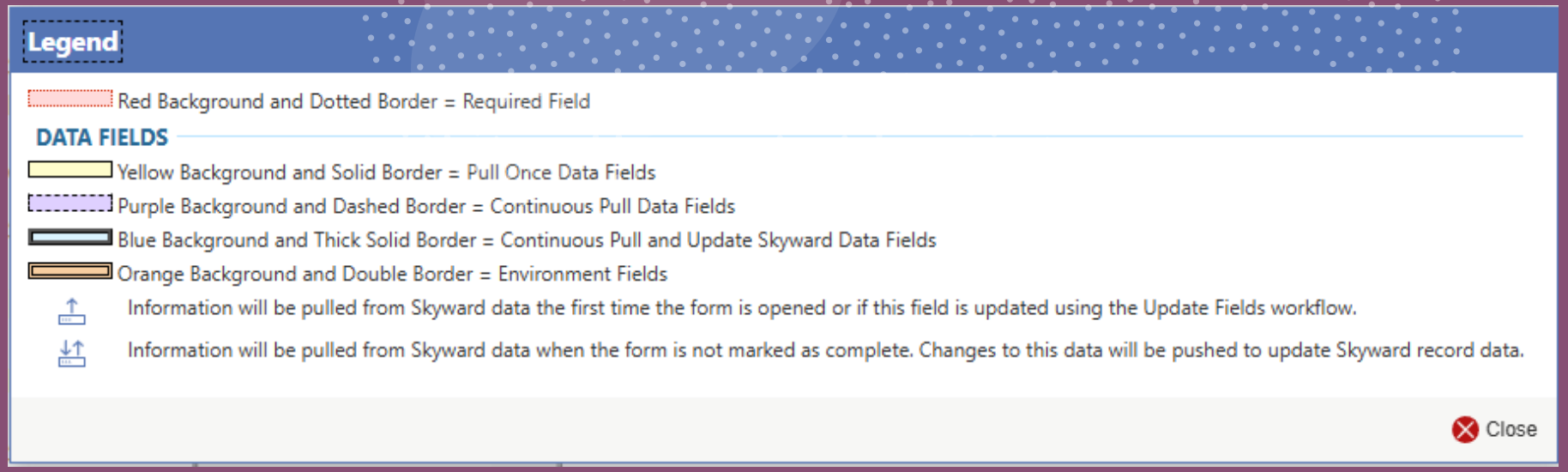
Linked Data Relationships

- Guardian info
- Guardian phones
- Other student-associated records
- Auto-updates available (Continuous Pull)

Form Fields

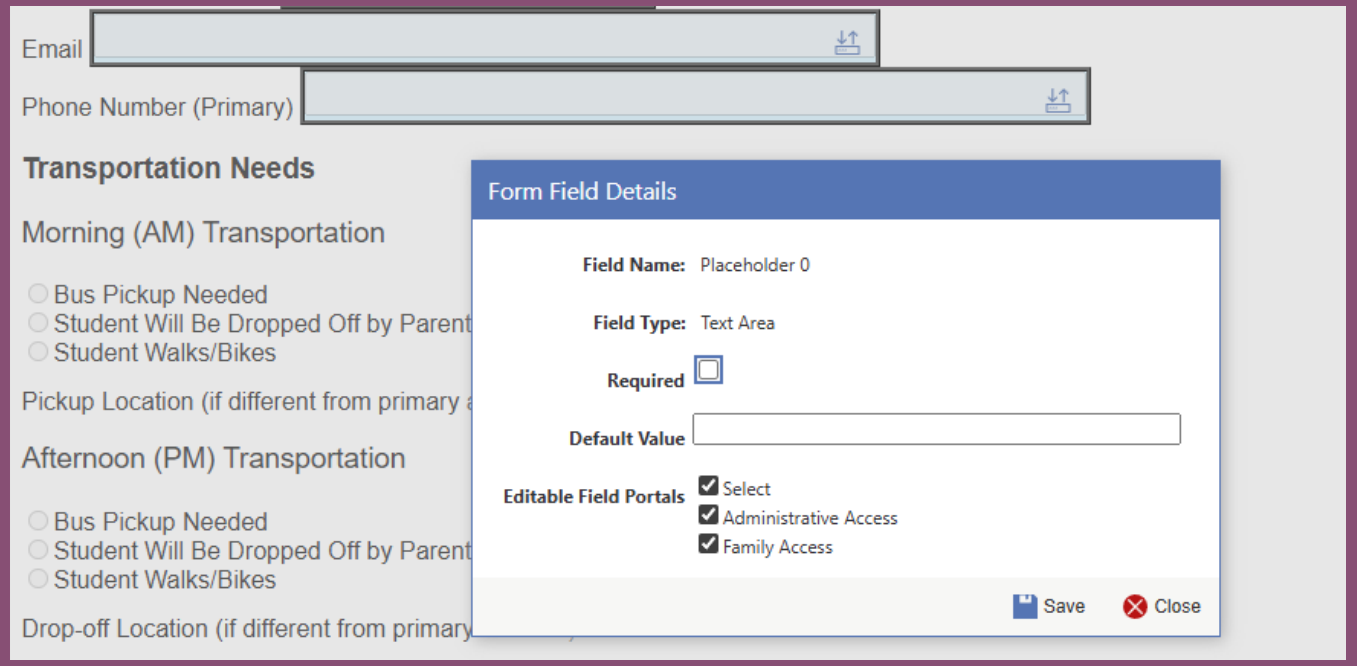
- View all fields that are in the form
  - These fields are all accessible via the Report Designer
- Individually customize field permissions

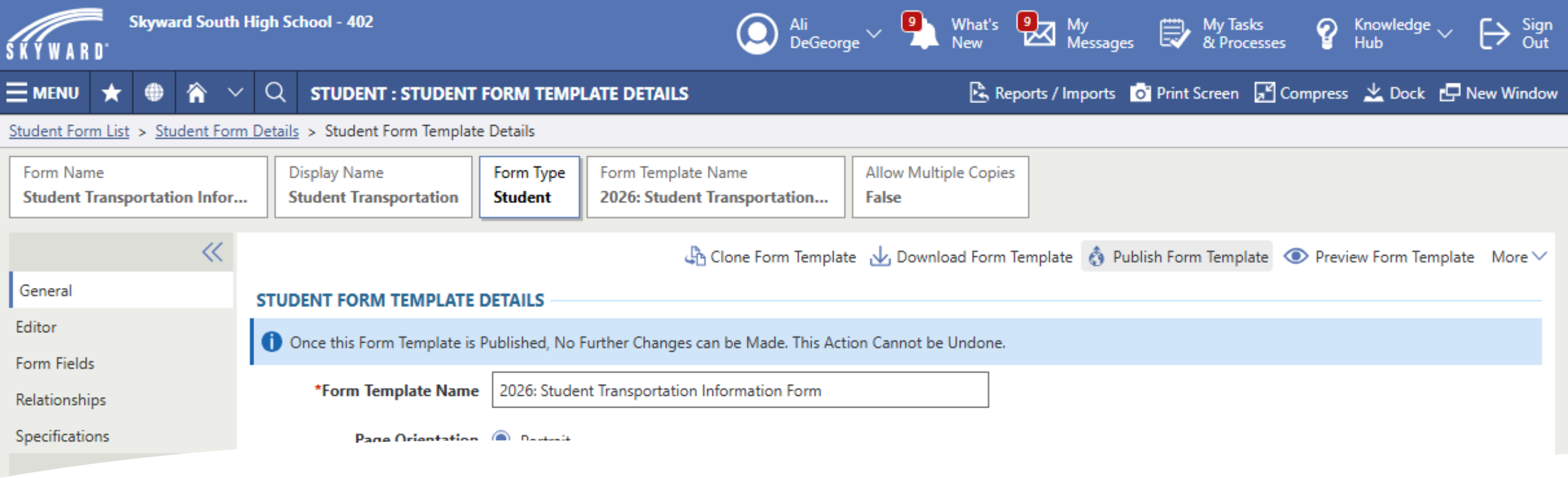




Specifications

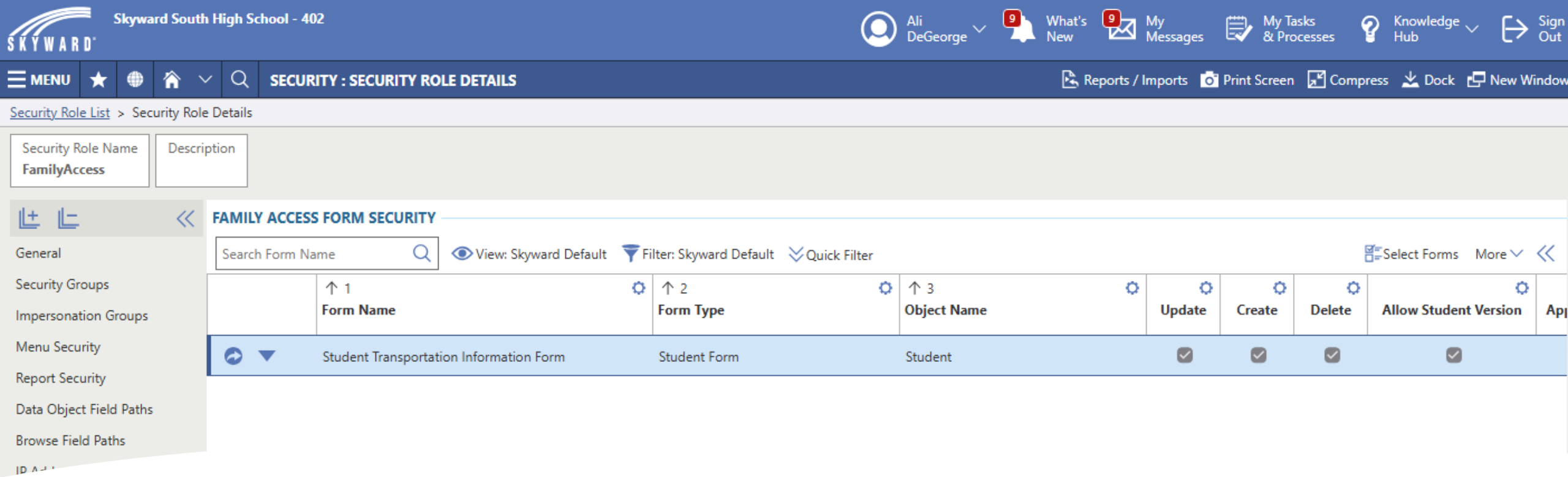
- Overview of form fields within the form
  - Understand field linking
- Allows you to set Field Details
  - Update individual field parameters





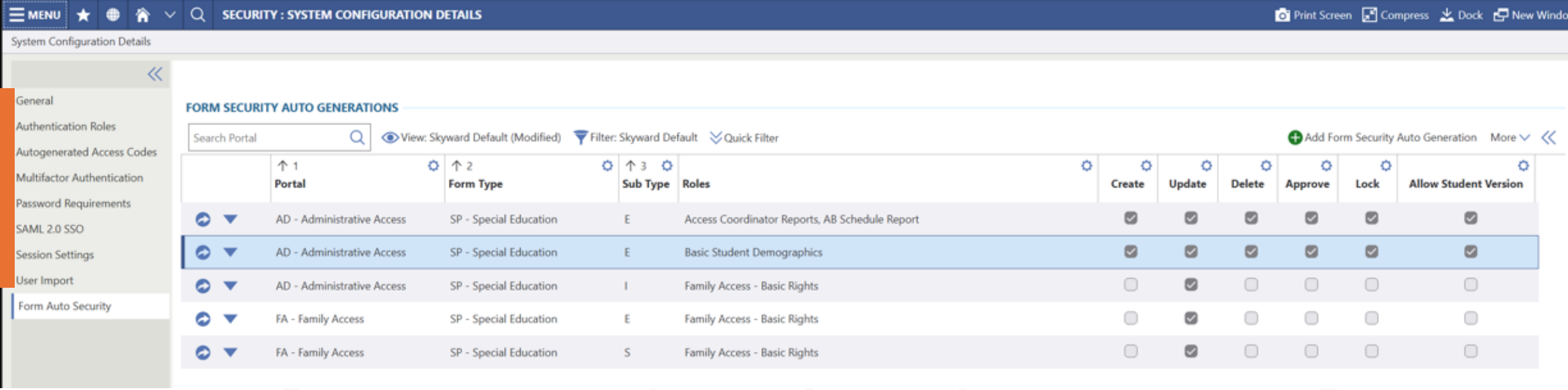
Template Options

- Clone Form Template
- Download Form Template
- Publish Form Template - Marks the form as **finalized** and ready for districtwide use
  - ⚠ REMEMBER SECURITY
- Preview Form Template
- Delete Form Template
- Print Form



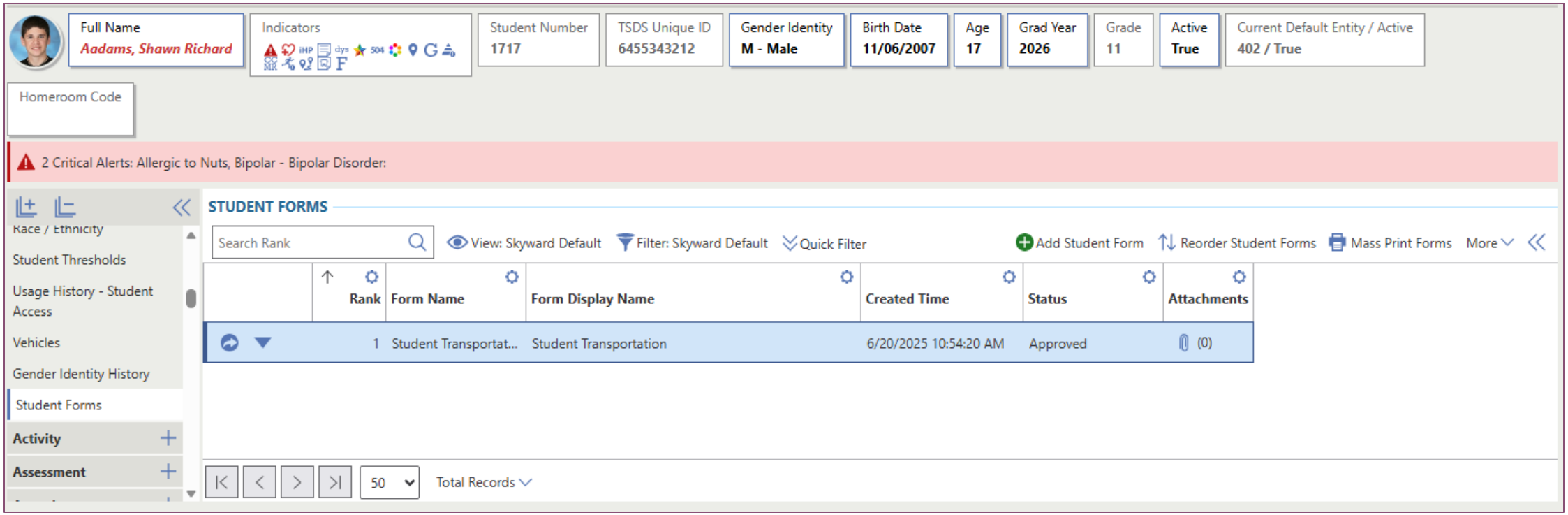
Form Security

- Security > Security Role > Role Details > 'Form Security'
  - Family Access
  - Administrative Access



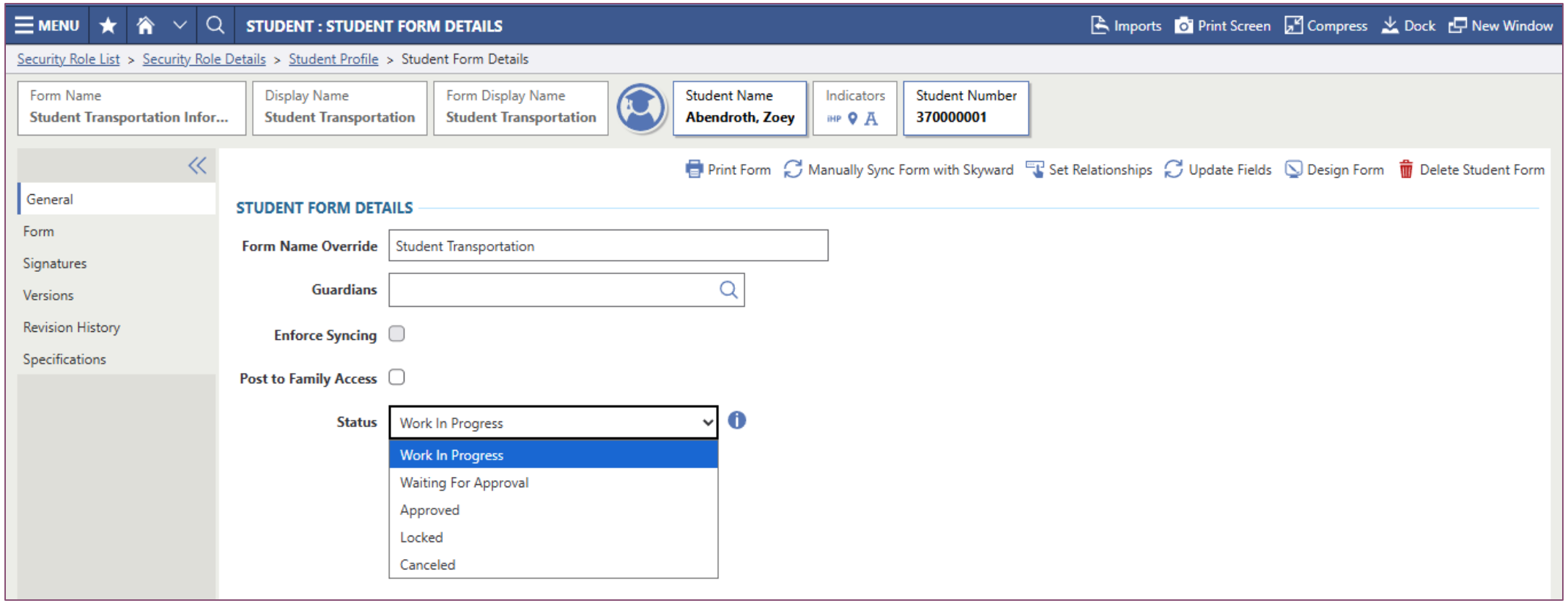
Automated Security

- System > System Configuration > Form Auto Security
  - Allows you to setup role-based security based on form type
  - Does not impact your ‘post’ options



Assigning Forms to Students

- Through manual assignment
  - Student > Student Profile > General > Student Forms
- Mass Add Student Forms
  - Scheduled Tasks
  - Standard Student Filter

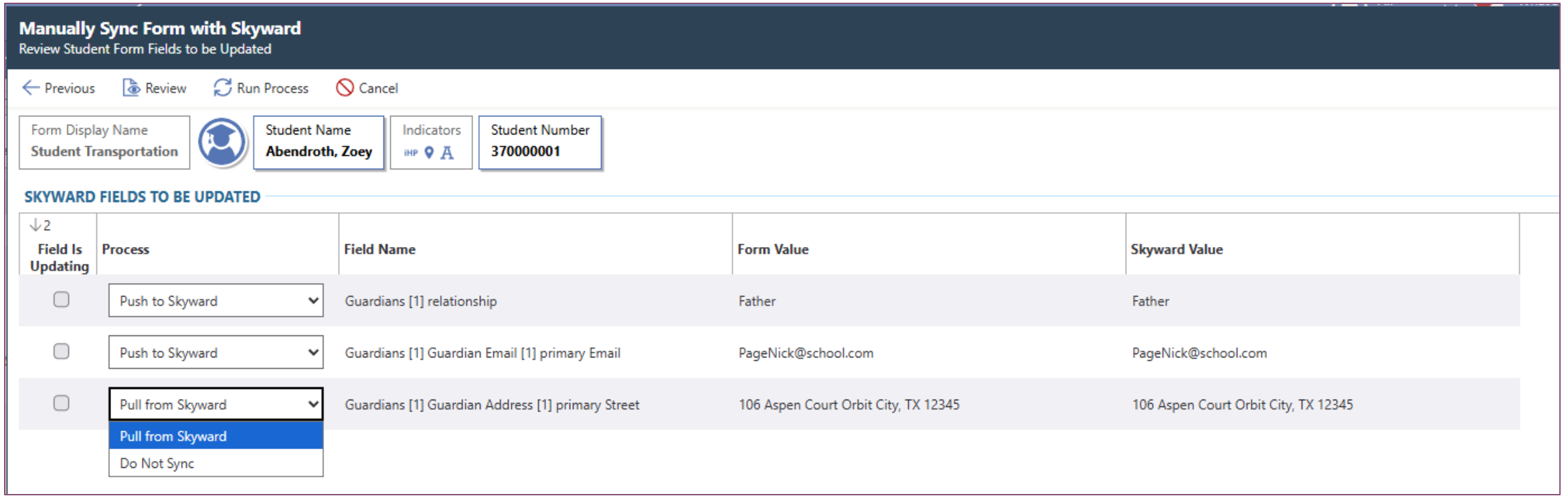


Student Form Options

- Post to Family Access – Makes form available to guardians
- Versions – per student changes
- Signatures – who has signed the form and when
- Revisions History – Manual Sync Process/Status Updates
- Form and Specifications function the same as template creation

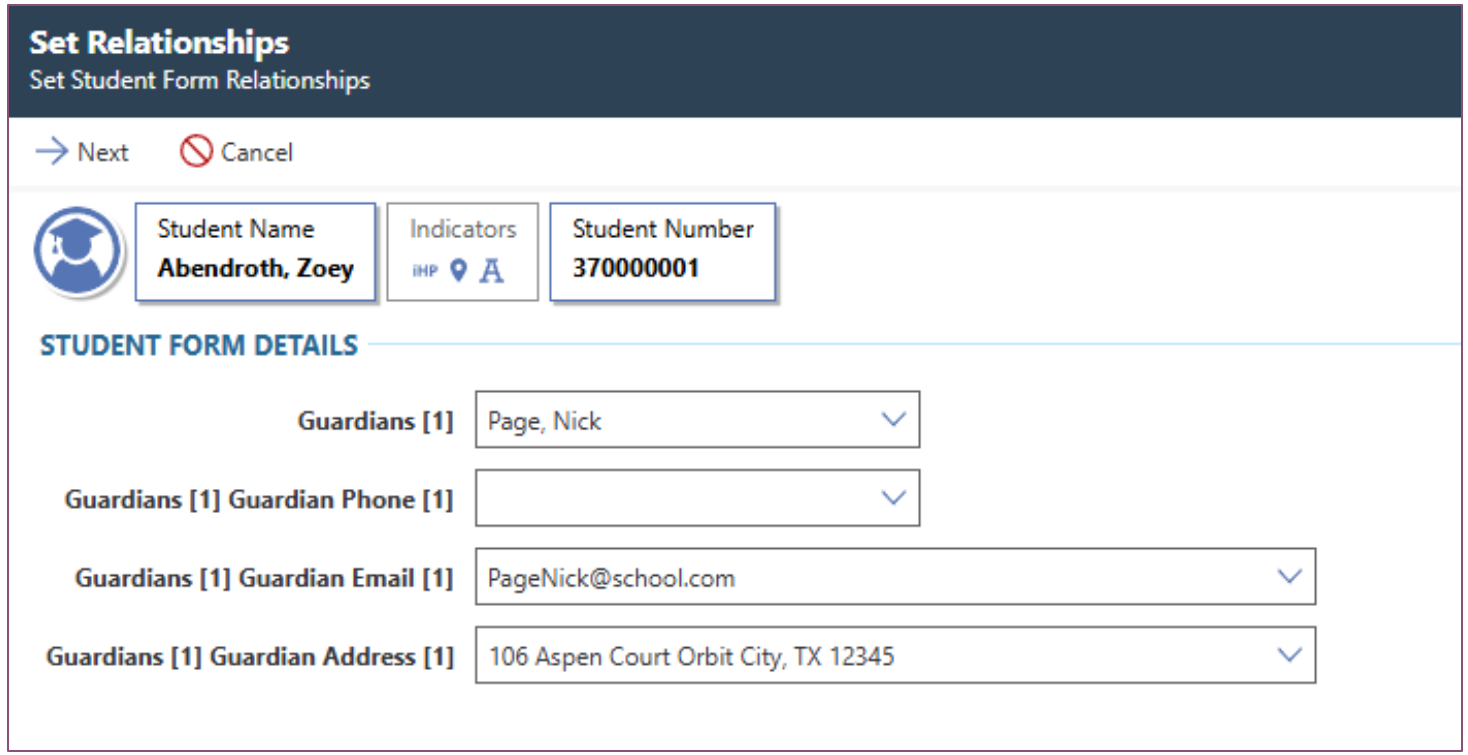
Syncing Form Data

- Side by Side view of data in form versus data in Skyward
- Select what data you want to update and how



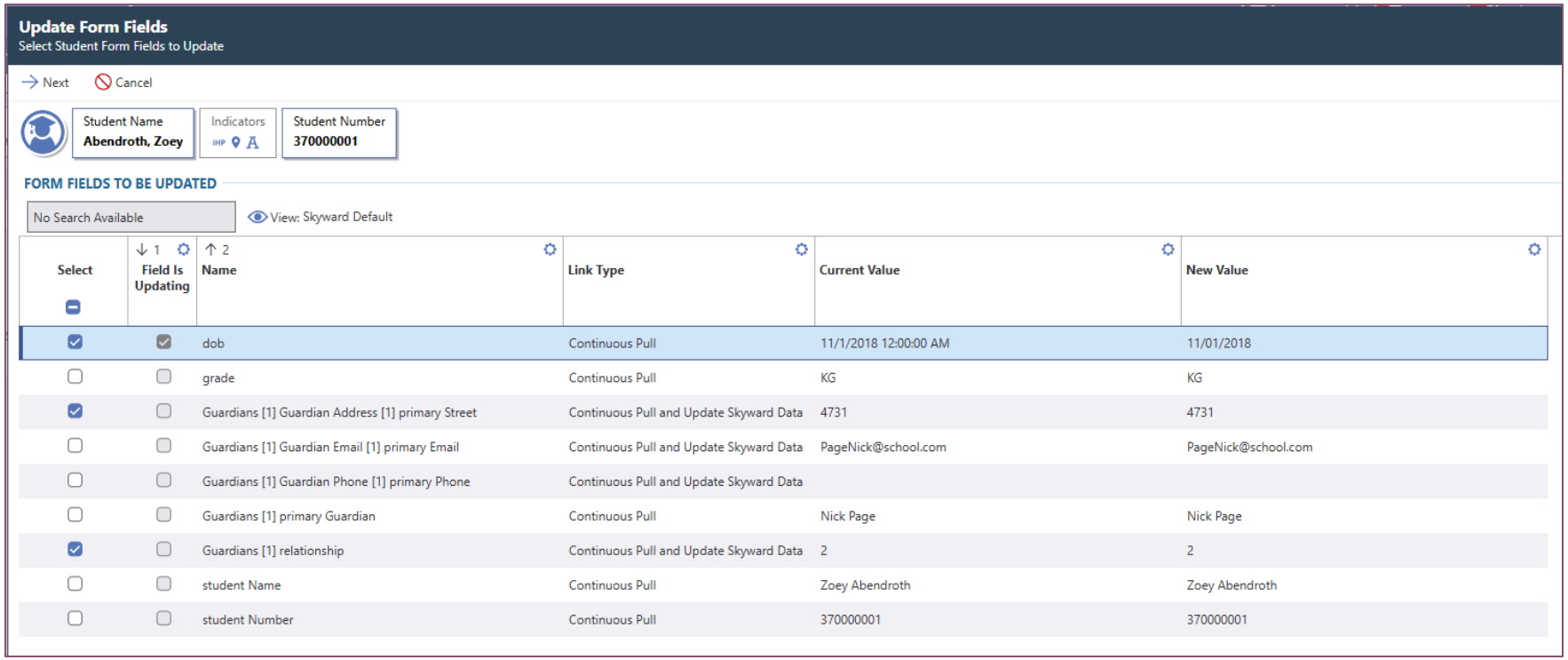
Relationships

- Select who that guardian 1 relationship that we set up belongs to.
- This auto populates for you upon form assignment.



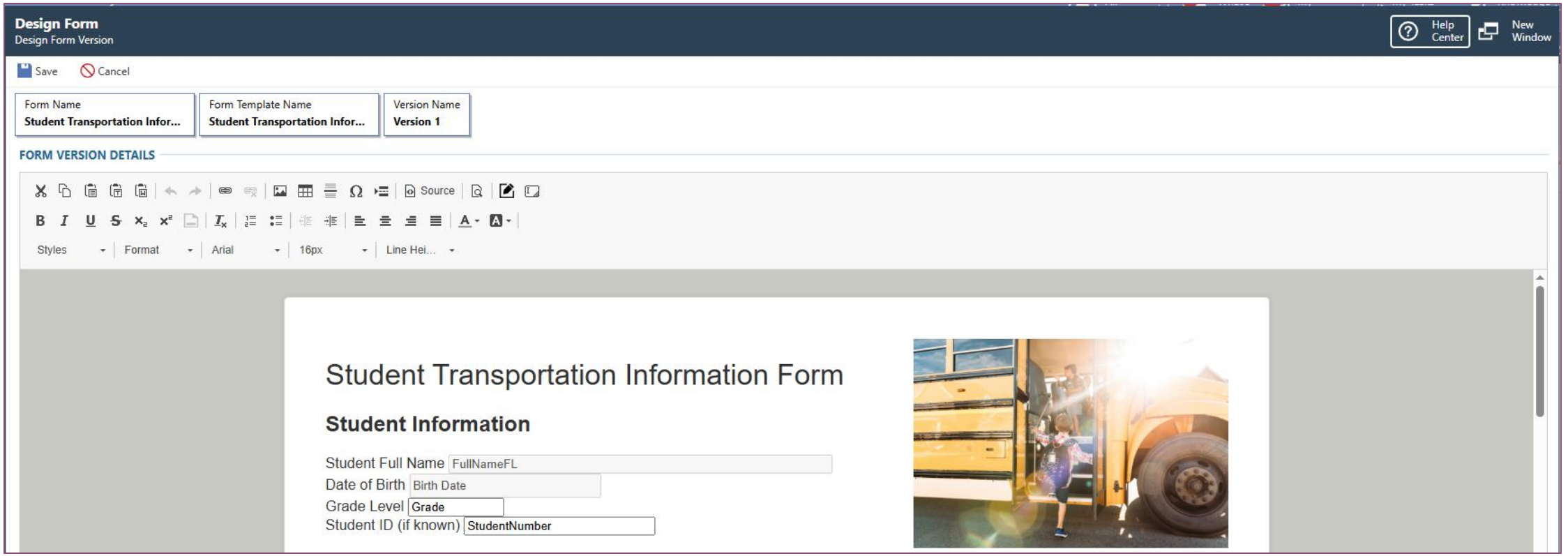
Update Form Fields

- Grabs Skyward fields and allows you to update the form
  - This is great when you've selected 'pull once'; however, there is a change in system data



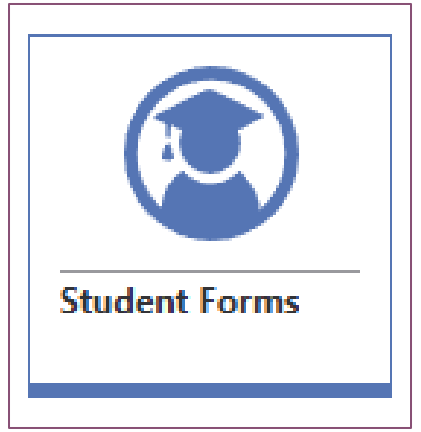
Design Form

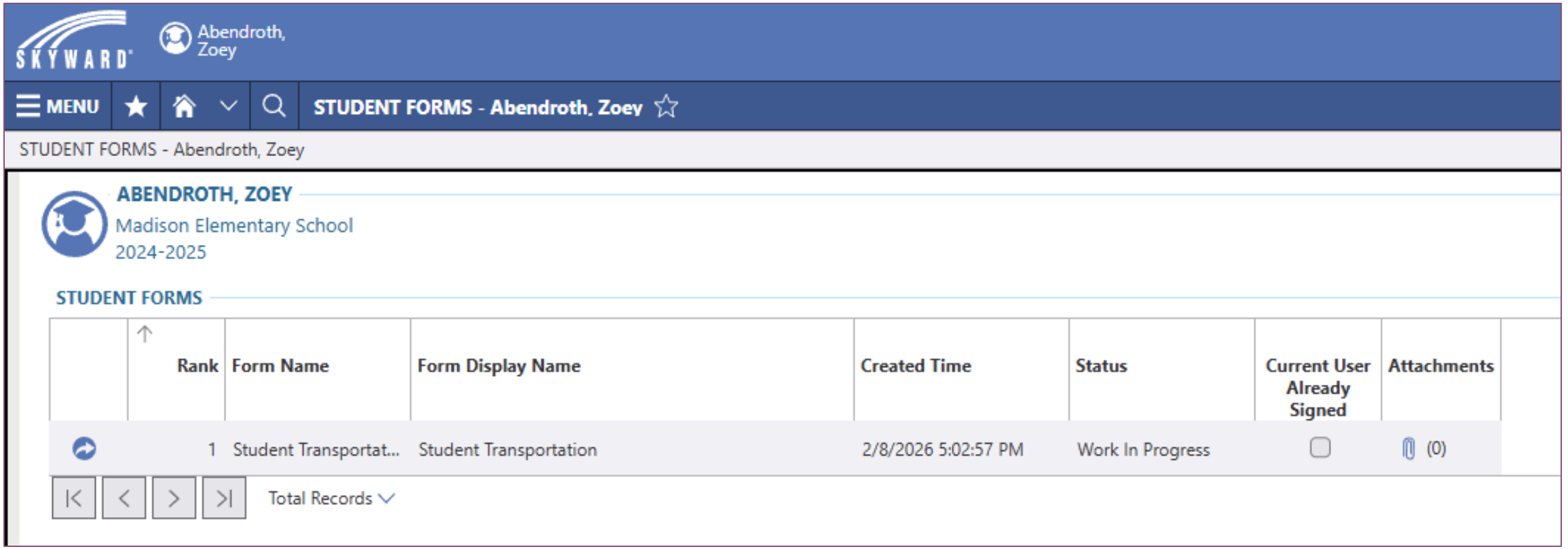
Make custom changes to this individual student's form



Family Access

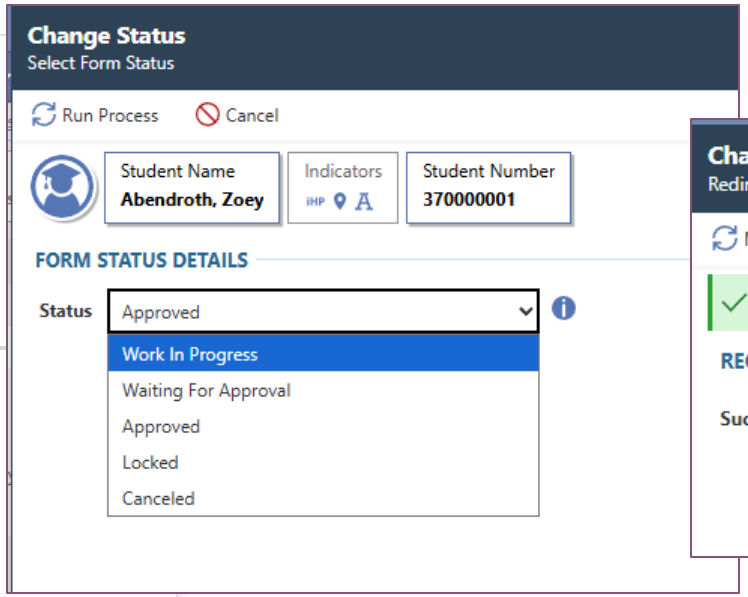
- Student Forms Tile
  - View Status
  - Fill Out, Save, Sign
  - Changes can be made till Approved

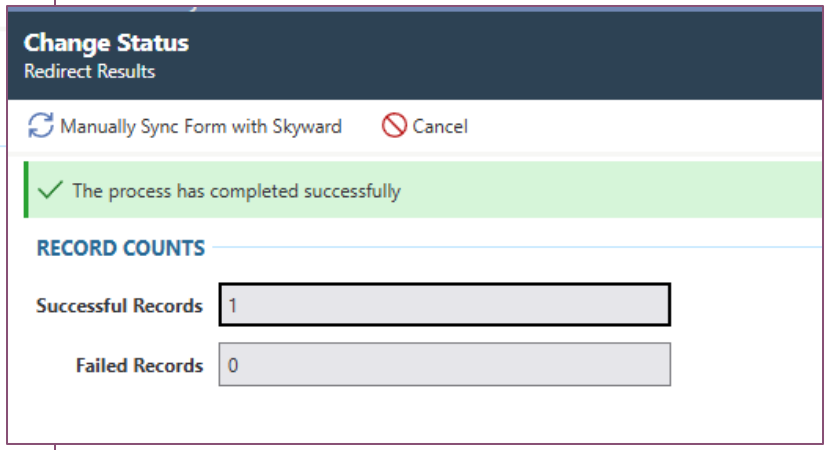


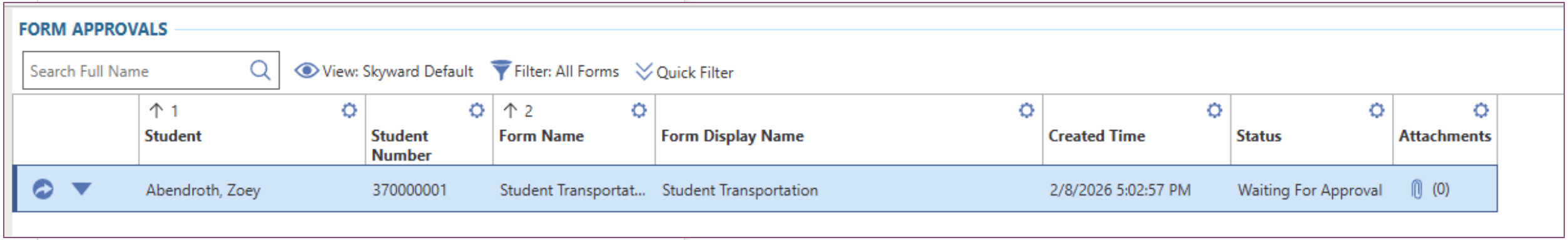


Admin Approval

- Student > Form Approvals
  - Change ‘Status’
  - Sync Form with Skyward







DEMO: AI Anyone

What’s a real form in your district you wish could be automated?

Where do we go from here?



Real-world Scenario

- What triggers the form
- Who completes each section
- What data should sync back
- What signatures are needed
- What statuses the form should pass through

Q&A + Feedback



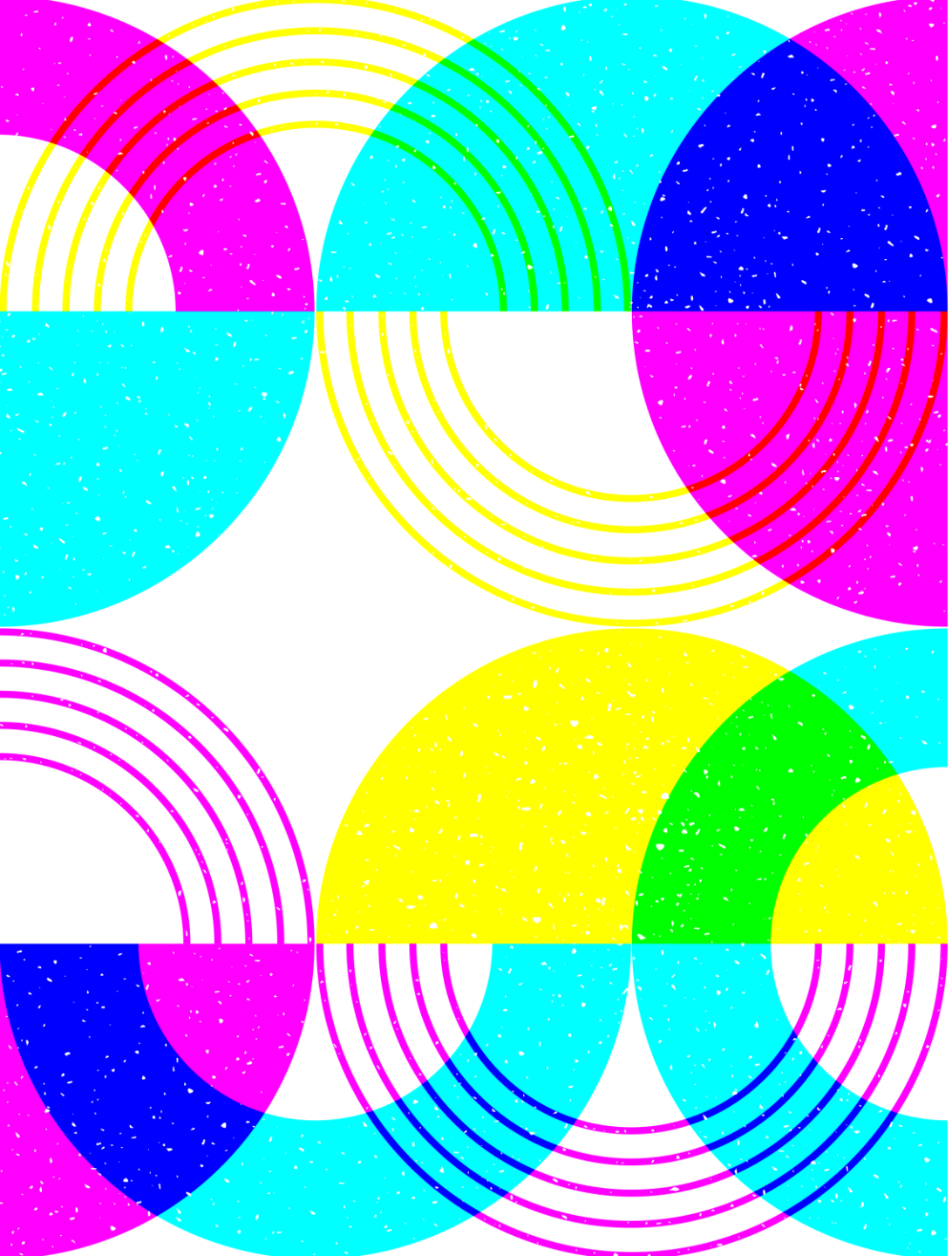
WHAT FORMS DO YOU STILL MAINTAIN OUTSIDE QMLATIV?



WHAT SLOWS DOWN YOUR TEAMS TODAY?



WHAT WOULD HELP MAKE FORMS MORE “AUTOMATED” OR “SMART”?



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thank you!