

Transcript for Forms, Permissions, and Surveys Video

This video provides an overview and summary of the main features of the Forms module in IRIS ParentMail.

This video is accessed from the Forms Video topic in the [IRIS ParentMail help centre](#).

Transcript

Hello and welcome to the IRIS ParentMail Forms, Permissions, and Survey training. We use forms for gathering data from parents for things like trip consent, medical forms, extracurricular club selections, and admissions data to name just a few. In this session you will learn how to create forms, see how parents complete forms, how to complete forms on behalf of parents, and how to view their responses.

Before we begin, there may be a set of parents on your system who will receive no notification at all that there is a new form to complete, those that are parents who have not registered or connected, and have only provided mobile numbers no email addresses. If you want to reach those parents, take a look at your **Settings** and **Message Priority** and select the **Forms** module. If you want non-registered parents who only have mobile numbers to receive a notification, then turn your **New Form** notification to **On**. When you send a form, an SMS registration link will be sent to those parents. Please remember that sending any form of SMS from your system is charged from your text credit allowance. If you prefer not to enable this setting, then a paper copy will be generated for those parents.

Let's navigate to the **Forms** module. From here we are going to create a new form.

This white section here is your **Form Builder**, and you use these widgets on the left to build your form. I'm going to create a form using each of these widgets. To use a widget, just click on the one that you require, drag and drop into the **Form Builder** section. If you hover over the widget within the **Form Builder**, you will see the line darken and new options become available. You can copy this widget. You can move the widget up and down the form. You can delete widget. And we can also edit the widget. Click on the notepad and pencil and that will bring up the widget editor. When I hover into the **Edit** section, an orange border appears and just shows me that whatever changes I apply within the editor will appear on the **Form Builder** side.

So, let's give our form a **Heading**. When you're happy with your heading, click **Save and Close** and this will return you to the widgets menu.

Now let's apply a **Sub Heading**. Click, drag and drop into your **Form Builder** and again we're going to edit this **Sub Heading**. Click on the notepad and pencil to edit and we're going to give our form the subheading Grafham Water. **Save and Close**.

Now let's give our parents more information about this trip. Select **Paragraph**. Click, drag and drop into your **Form Builder**. The paragraph can contain all the information you need to provide about this trip, such as dates, times, lunch information, spending money, and so

on. If you've already got this information written up elsewhere, you can simply copy and paste this into your editor. Click on the notepad and pencil. And we'll place that information into our editor.

We're going to set an expiry date on this form in a little while, but it's important to know that parents do not see the expiry date on their form, so you must communicate that somewhere within this form. **Save and Close.**

Now that we've provided parents with information about the trip, we need to collect information from them. We'll start with the **Input Box (Single Line)** where we're asking parents for some basic details. I'll click, drag and drop and then edit and you will see we have a few more editable parts to this widget. First, we can give this widget a title. As this example is a basic consent form, I'm going to ask for contact details. You can place a description underneath this title. This can be used to advise parents further on what information it is that you require. In this instance it's pretty clear what we're asking for, so I'm going to remove this text. Parents will type their information into this **Label**. As I require two pieces of information, I'm going to add another **Label**. I can add as many labels as I like to this widget, and I can remove them if I have too many. Now we need to tell parents exactly what we want from them, so we're going to give our labels a name. This will show us greyed out text which parents will overtype with their information. In the first **Label** I'm going to ask for emergency contact name and in a second emergency contact number. This is required information so I'm going to tick the **Required** boxes, and this will make it mandatory for parents to complete. Let's **Save and Close.**

Next, we have the **Input Box (Multi Line)**. This is a larger text box. In our form, we're going to use this to capture any other information for our trip. You could use this widget for school survey style forms. You can expand the size of this box by clicking on the bottom right-hand corner and dragging the box to be as large or as small as you like. **Save and Close.**

The **Selection** widget is used for questions or statements which require one answer from a selection of responses. You could use this widget to gauge suitability for dates for some affairs or governors' meetings or preferred extracurricular club choices. In our example, we're going to use this as a "Do you provide consent for your child to join this trip?" where we're expecting either a yes or no response, I will add a description advising parents that we want them to select one of the options. You will then label your response options, so let's add a new option, make the first one Yes and the second one No. What this means is parents can choose either one of these options. You can of course add further options if you need them. Just click the plus button to add a new label and the bin to remove any that are no longer needed.

The **Checkbox** widget is for multi-choice responses. We're going to use this for "What activities do you want your child to take part in?" and I'm going to tell parents to "Please select all that apply" just to let them know that they can pick multiple options. I'm now going to label the response options and each label is going to correspond to an activity on my trip. So if I just add in the Water Minibeasts Hunt, Super Long Walk, and lastly, the Kayak

Adventure. This means that parents could choose 1, 2 or all of these trip activities. **Save and Close**.

Let's drag and drop and take a look at the **Date Picker**. This will present parents with an open calendar, so this would be great for capturing dates of births for admissions forms, arranging meetings with parents, annual meetings, and school plays. However, if you do have a specific set of dates already in mind, maybe you want your staff to let you know which date they think is best for the summer fair, you might prefer to use the **Selection** or **Check Box** tool instead.

The last widget is the **Email Address**. Drag and drop and edit **Email Address** widget into the **Form Builder** and what will present to parents is a single line to pop in their email address. Again useful for admissions forms or collecting alternative email addresses.

Now we have built a form using all of the available widgets, you can use widgets multiple times and you can move them around as you are building your form. Once you have made a form, you have the option to **Clear** to start over, **Save the Template** if you think this might be a form that you would use regularly, or **Submit**.

Clicking **Submit** brings up this **Send Form** section where we first add a **Subject**. We're going to add recipients to this form, so I'm going to select my year three group. You can see that all of my students are selected so I can click **Confirm**.

We need to decide whether we are sending a form to **Primary Contacts** only remembering the primary contacts of those parents which you've allocated P1 or Priority One within your MIS. If you do not tick **Primary Contacts**, only then for the recipients we've added, either parent can complete this form. Some families may have requested that they receive correspondence per parent. Perhaps the family have separated and both parents required to give consent for their children. We can select those children and this will generate a form to both parents. Let's pick a student. OK, so both parents for these children are going to receive separate forms. If you do tick **Primary Contacts**, then in both cases a form will only be sent to the P1 contact.

You can select an anonymous reply which is useful for school surveys if you do not want to know who the responses have come from.

If you have a school population of 200 students and you only require responses from half of those, you can set the **Maximum Replies** to 100 and after this number has been reached, the form will become unavailable to remaining parents. If you want everyone to be able to answer the form, just leave no number in there.

We can set an expiry date for forms. In this instance, I'm going to set the date to expire to match what I'd written in the paragraph section of my form earlier. So, the 10th of September, end of the school day. After this date, the form will show as expired in the parents' view if they do not complete the form.

Lastly, you can set **Reminders** as per this drop-down menu either **Every Day** for a maximum of three days or **Every Week** for a maximum of three weeks.

Let's send the form then. I can see that I'm about to send two forms digitally and generate 22 paper copies. This is because of all the parents I've selected to receive this form, although many have provided me with email addresses, only two of my parents have registered or connected with ParentMail. The remaining parents will receive a paper copy of this form. If you enabled SMS notifications earlier, the registration links will be sent out to recipients of this form.

As soon as we click **Send**, this will take us to the **Responses** section of our **Forms** module. Let's see where those paper copies went then. Navigate down to **Documents to Print** and within this menu item, choose **Forms**. The newest form has a little dot to signify that it's new. If you click on the name of the form, up shows a PDF which will contain a list of the students who require paper copy forms and a mail merge document with a personalised copy of the form for each child. You can print off this list and pop a copy into each child's book bag for them to take home.

Now we'll go and complete our form from the parents' perspective. If we go to **My Staff App**, this provides us with a parents view of ParentMail. Navigate to **Forms**. There's a notification to tell me that there's a new form to complete. Let's click into the form. We can see each of the widget elements that we use to create our form. Here's our **Heading**, our **Sub Heading**, the **Paragraph** section, the **Input Box (Single line)**, (**Multi Line**), our **Selection**, our **Check Box**, our **Date Picker**, and the **Email Address**.

I'm going to complete this form as Kathryn's parents and let's complete these details. If you remember, we ticked the single line entry as required so they're boarded in red. Have to complete these. Let's pop a little note in for Kathryn. We can choose one of the following options. Remember, this is our **Selection** tool, so we can choose either Yes or No, and in the check box we could choose as many of these options as we want. Let's just leave it at those two. This is the calendar, so parents could pick any date that they want to. If you want specific dates choosing, perhaps consider using either the **Selection** or **Check Box** tools instead. This really is helpful for capturing dates of births though. And lastly, we have that **Email Address** widget here, so let's pop an email address in there.

So, if I click **Submit** now, it shows that the form has been completed. If I click **OK** and click back into the form, it shows me that that form has been submitted.

Let's go back into school. So, we're now back in the office and you can see that there's a notification to advise a new response has been received. Click on **Responses** and select the form that we are working on. The first thing you'll notice is the **Form Response** stats. The first section shows you the **Form Response Frequency Over Time**. So today, one form has been received and the next section shows **Responded Not Responded** pie chart. So, you have a clear indication of how many parents have completed the form. You are able to email all the parents who have responded or email those who have not yet responded. An email compose screen will pop up and you can send a message to that particular group of

parents. If we scroll down the screen, you can see that Kathryn's form has been completed. You can view the responses here. You can clear the responses if mum has made an error with her details, and this will enable mum to recomplete and submit her form again.

For those who have received paper copies, once you received that copy back into the office, you can copy that response into the system by clicking on **Respond**. So, we'll respond on behalf of mum, **Respond for user**, and let's just pop some details in here. And Theresa can take part in all the trip activities and we'll **Submit**. Once you receive another response, you can see that our **Form Response Frequency** stats have just changed as well.

Now let's look at our **Actions** associated with responses. If we click on **Reports**, you can see a report that shows **All Responses Submitted For This Form**. As with any IRIS ParentMail report, you must generate the report and wait for the CSV to appear so that you can take a look at this data. I'm just going to open the CSV. You can see that each heading corresponds to a widget that we used within our form earlier, and you can see the parent responses in the fields below. The next report shows a **List Of Parents Yet To Respond**, and the last report will show a summary of percentage of parents who opted for each available option within your form.

If a child has received a paper copy and lost it, you can download a fresh, unnamed blank copy of that form by clicking on **Download**. You can edit some of the settings of your form, you can add further recipients, you can add more students who require separate responses, you can change the number of maximum replies, and you can change your expiry date, and you can add reminders if needed. You cannot change whether the responses are coming from primary contacts, and you cannot change the anonymous reply options.

The last option under **Forms, Actions** is **Archive**. So, once you've received all of your responses and the trip has taken place and everyone has had a great time, you can archive this form and it will move to the **Archive** folder underneath the **Forms** menu item.

Let's take a look at templates related to forms. You can see that we've helpfully devised a list of templates for you. Take a look through them, and if, for example, the **Homework Survey** was a form that you felt might be useful to send to parents, you could either **Send as a Form** without editing, just follow the instructions for choosing recipients as before, or you could use this template to adjust the wording, change the order of, or add further widgets, and either save the template for future use or submit with your own wording.

That's everything for forms. I hope you found this session useful. Thank you.