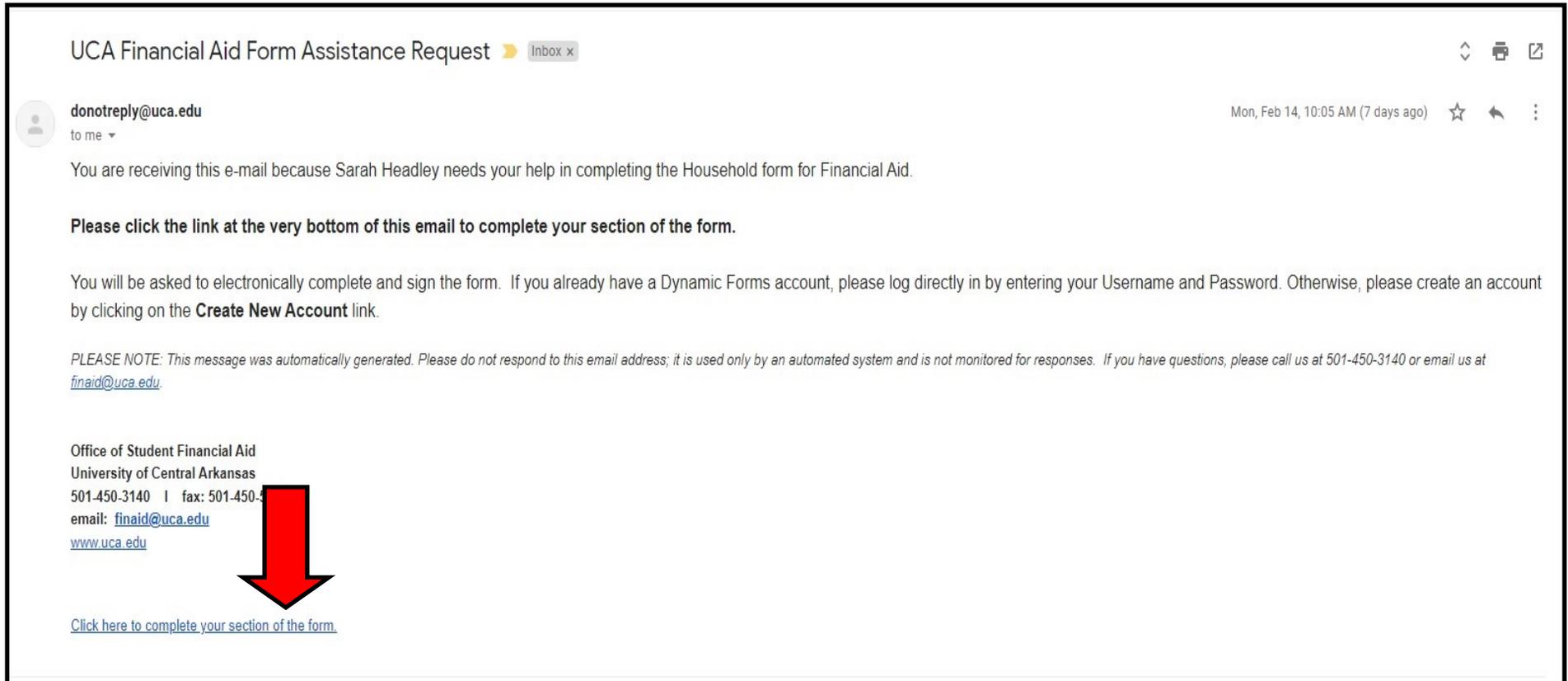


Online Dynamic Forms Instructions for Parents

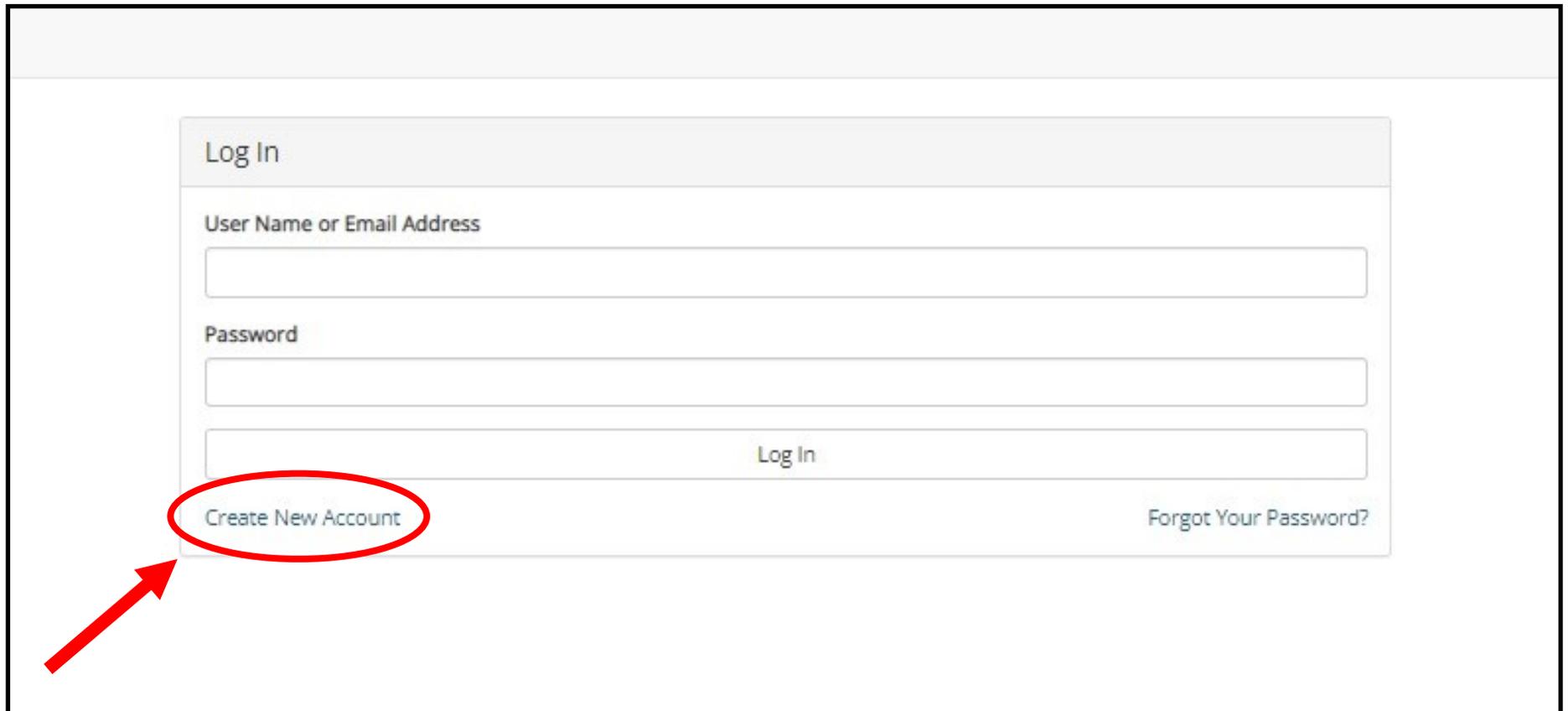
Click the link at the very bottom of the email that was sent to you or go to <https://dynamicforms.ngwebsolutions.com/>.



Once you click the link, it will take you to a login screen to get securely logged in as the parent.

This email address associated with this login is specific to the parent and is different than what the student uses.

This is the login screen. If you have a parent account in the Online Dynamic Forms software, you can simply log in. Otherwise, you will need to click Create New Account. Since this software is new to UCA, you likely do not have a parent username and password yet for our online forms. Click Create New Account.



The image shows a login form titled "Log In". It contains the following elements:

- User Name or Email Address**: A text input field.
- Password**: A text input field.
- Log In**: A button located below the password field.
- Create New Account**: A link located at the bottom left of the form, circled in red.
- Forgot Your Password?**: A link located at the bottom right of the form.

A red arrow points from the bottom left towards the "Create New Account" link.

Create Account

Our enrollment process is fast, easy and secure. Once enrolled, you will immediately have convenient online access to complete required forms, view pending forms, and review your completed forms history.

Please complete all of the information below

Username *

Username restrictions:

- Must be at least 8 characters long
- Must contain at least one letter.

Password *

Confirm Password *

Password restrictions:

- Must be at least 8 characters long
- Must contain each of the character types below:
 - upper case letters
 - lower case letters
 - numbers
 - special characters: @ & \$

First Name *

Last Name *

Email Address *

Confirm Email Address *

Secret Question *

Secret Question Answer *

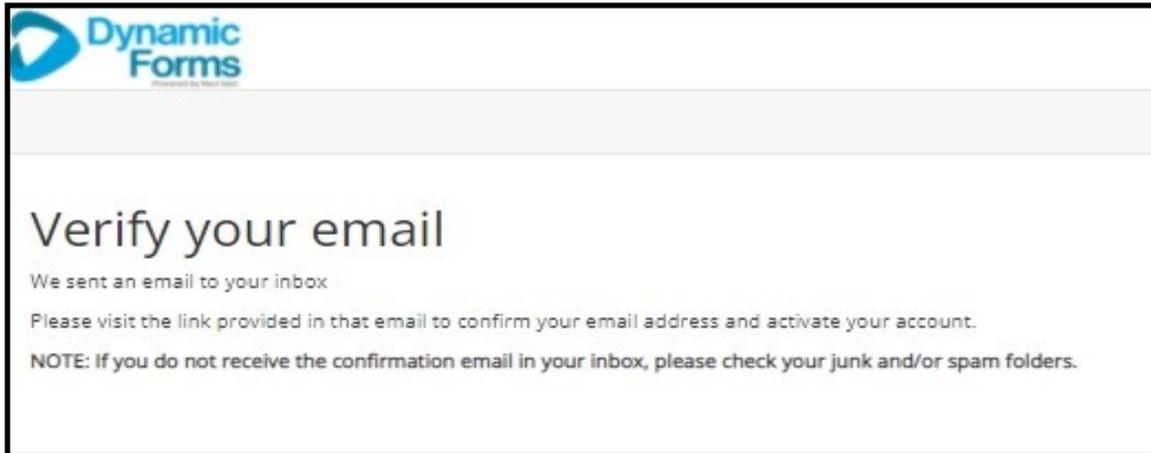
Answer Hint *

Create Account

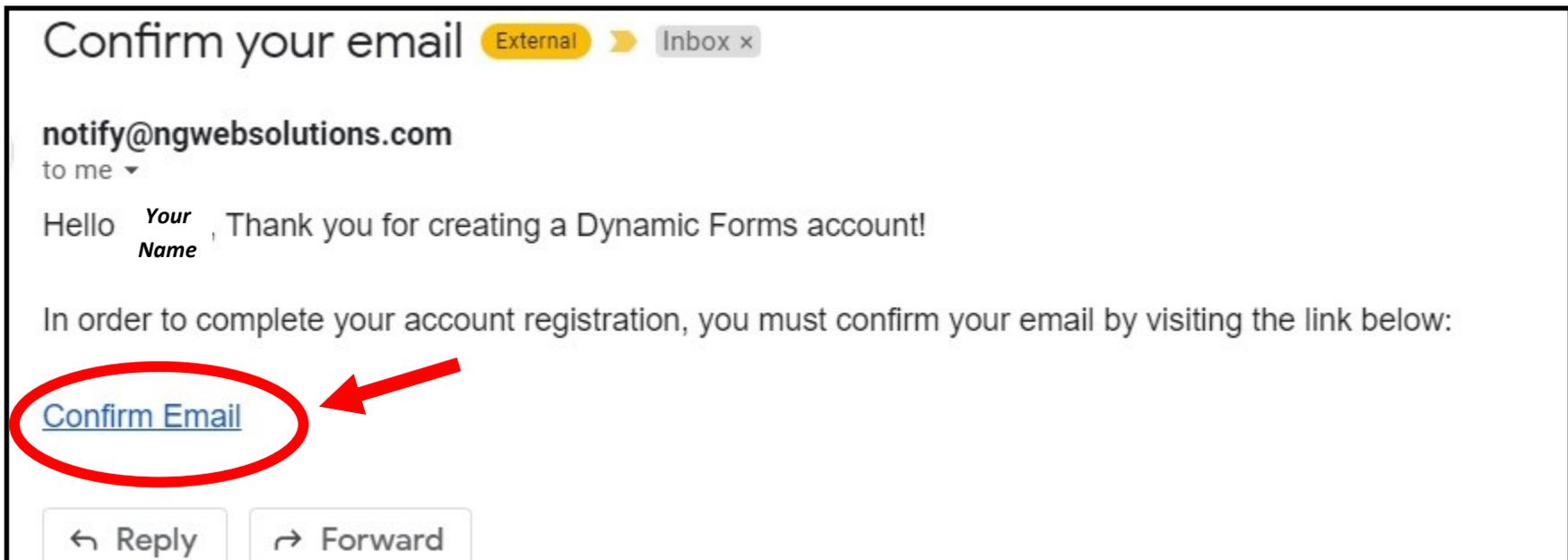
This is what the Create User Name next step looks like. This process is to set up a secure log in for you to be able to fill out online forms and electronic sign these forms in a secure atmosphere.

Follow the instructions on each step, then hit Create Account at the bottom.

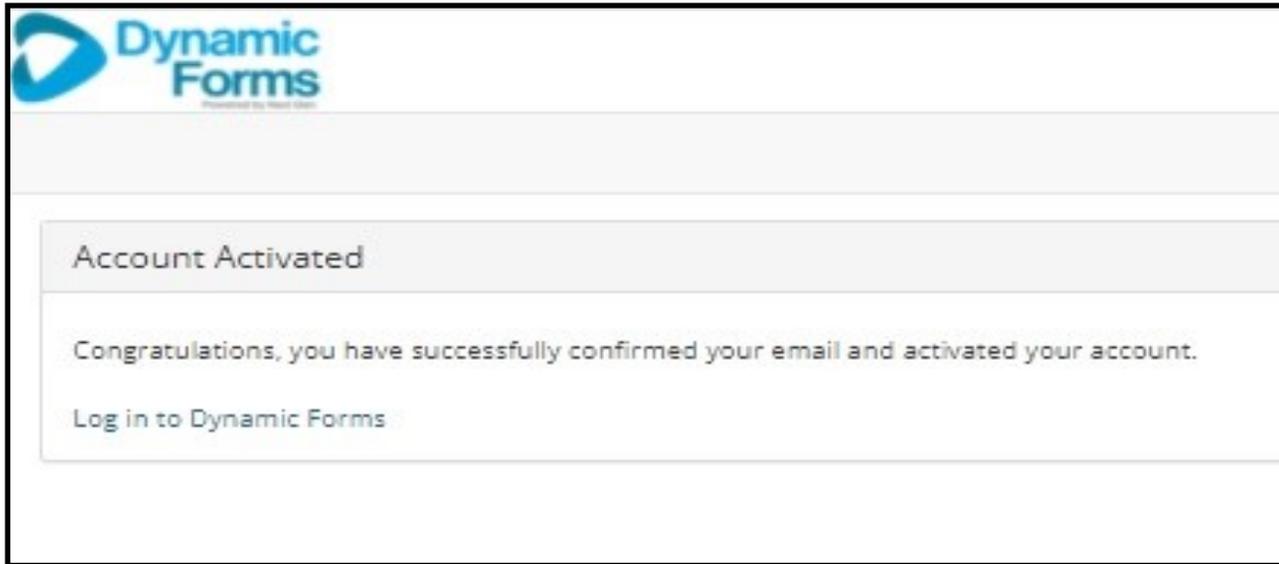
Once the login is created, it will tell you to verify your email address. This means you need to go in your email and verify your account information is correct.



In your email, it will look something like this. Click the Confirm Email link.



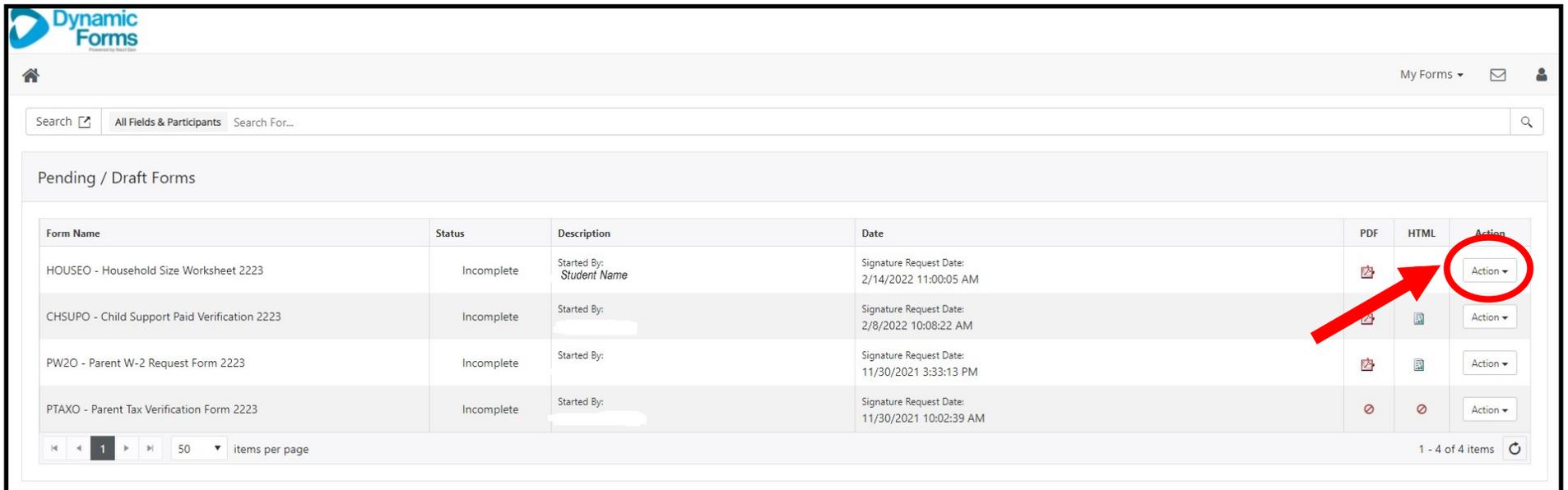
Once you click Confirm Account in your email, it will take you to this page.



You can do one of two things to get to your form at this point. You can click the Log in to Dynamic Forms option on this confirmation page or you can go back to your original email with the link to the form that was sent to you. If you go back to the original email, the link in the email should take you directly into the form to fill out.

If you choose the option to Log into the Online Dynamic Forms, this is the next screen. Sometimes it gives you the option to pick an inbox. The options are Pending/Draft Forms or Forms History.

The Pending/Draft Forms folder will display your forms that need attention.



The screenshot displays the 'Dynamic Forms' interface. At the top left is the logo. Below it is a search bar and a navigation menu with 'All Fields & Participants'. The main section is titled 'Pending / Draft Forms' and contains a table with the following data:

| Form Name | Status | Description | Date | PDF | HTML | Action |
|---|------------|---------------------------------|--|-----|------|----------|
| HOUSEO - Household Size Worksheet 2223 | Incomplete | Started By: <i>Student Name</i> | Signature Request Date: 2/14/2022 11:00:05 AM | | | Action ▾ |
| CHSUPO - Child Support Paid Verification 2223 | Incomplete | Started By: [redacted] | Signature Request Date: 2/8/2022 10:08:22 AM | | | Action ▾ |
| PW2O - Parent W-2 Request Form 2223 | Incomplete | Started By: [redacted] | Signature Request Date: 11/30/2021 3:33:13 PM | | | Action ▾ |
| PTAXO - Parent Tax Verification Form 2223 | Incomplete | Started By: [redacted] | Signature Request Date: 11/30/2021 10:02:39 AM | | | Action ▾ |

At the bottom of the table, there is a pagination control showing '1' of 50 items per page and '1 - 4 of 4 items'.

You can see that this parent has 4 pending forms that the Status is Incomplete.

To Complete these forms, Click the Action drop down box on the right out beside the form you want to complete.

It will display a few options:

- Complete Form
- View PDF
- View HTML

Click Complete Form to start and/or finish the needed form.

When completing a form, follow the instructions closely.

When you have entered everything needed and uploaded any documents the form asks for, click on the yellow box in the signature field to sign the form.

A popup box will appear for you to re-enter your name then click Sign Electronically to sign the form.

The image shows a screenshot of a web form with a modal popup window titled "Sign electronically".

Background Form:

- Document Type:** Attached 2021 W-2 or 1099s from other employer
- Parent 1:** -- Please Select (dropdown), Parent W-2 or 1099 (Choose File), No file chosen, Files over 25 MB will not upload
- Parent 2 (if applicable):** -- Please Select (dropdown)
- D. STUDENT SIGNATURE:** * (required), ID: ...3435343832, Signature: [Redacted], Date: 11/30/2021
- E. PARENT SIGNATURE:** * (required), (click to sign) [Yellow box], Signature: [Redacted], Date: [Redacted]
- *Note:** Remember to hit the Submit button when you have completed and signed the form. The Save feature is only if you want to save your input progress to complete the form at a later date.
- Buttons:** Save Progress, Submit Form

Sign electronically Popup:

- Close button (X)
- Text: Please read the [Disclosure / Consent](#) before you sign your form electronically.
- Text: Typing your name exactly as it appears below signifies you are completing this form using an electronic signature. By signing electronically, you are certifying that you have read and understand the Disclosure/Consent and agree to electronically sign. You also agree to receive required disclosures or other communications related to this transaction electronically.
- Text: To continue with the electronic signature process, please enter your name and click the "Sign Electronically" button to save your information and submit your electronic signature.
- Fields: First Name, Last Name
- Button: Sign Electronically
- Text: If you would like to opt out of electronic signature, please click the "Opt out and print" link below to save your information and print a hard copy for your signature.
- Link: [Opt out and print](#)

Red arrows in the image point to the "Sign Electronically" button and the "First Name" and "Last Name" input fields.

Once you hit Sign Electronically, it will take you back to the form with your signature displayed.

You then want to hit the Submit Form button when the form is complete.

Do not hit Save unless you plan to come back to the form to finish it later.

C. CERTIFICATION AND SIGNATURE

I certify that all of the information on this worksheet is complete and correct.

*
Student Signature ...3930343139

Student Signature Date
02/14/2022

I (the parent) certify that all of the information on this worksheet is complete and correct.

If the above information is not correct, please do not sign and submit the form.
You have the option to Return the form for revision back to the student. If you do so, you will be prompted to send a message to the student with your notes on what to correct on the form. Then once the student has made the changes and submits the form again it will be sent to you so that you can sign the corrected form and then submit it.

*
Parent Signature ...3934393638

Parent Signature Date
02/21/2022

Note

Remember to hit the Submit button when you have completed and signed the form.

The Save feature is only if you want to save your input progress to complete the form at a later date.

Save Progress

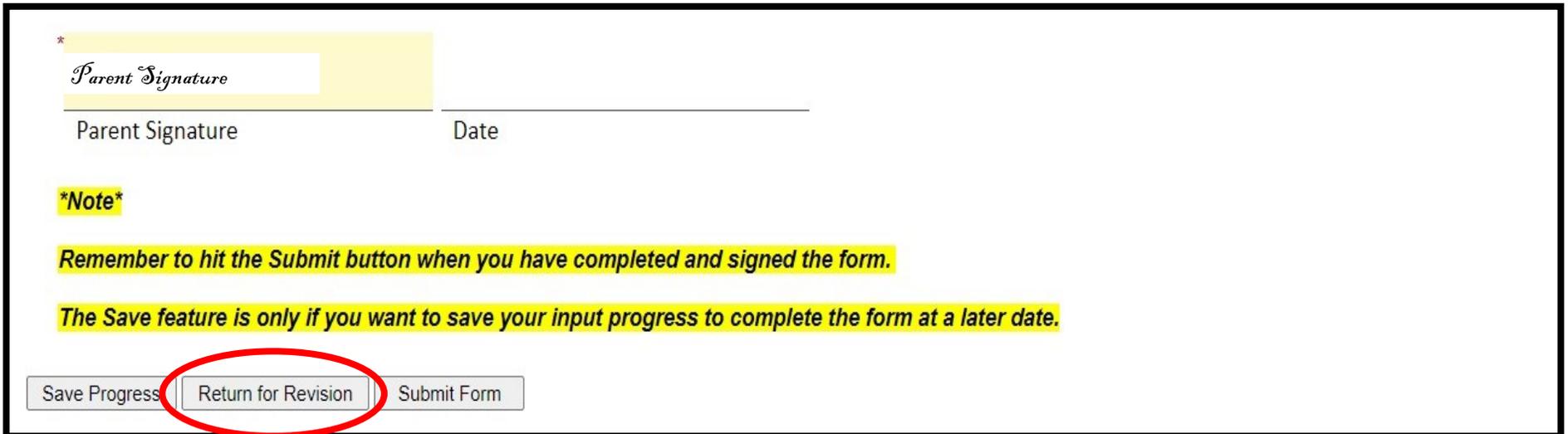
Return for Revision

Submit Form

Some forms ask the student to enter the information and the parent simply needs to verify that the information on the form is correct then electronically sign the form.

If you find something that your student has entered incorrectly, you can return the form to the student for revision before you submit the form.

You can do so by clicking the Return for Revision option at the very bottom of the form you are working on. It is located right beside the Submit button.

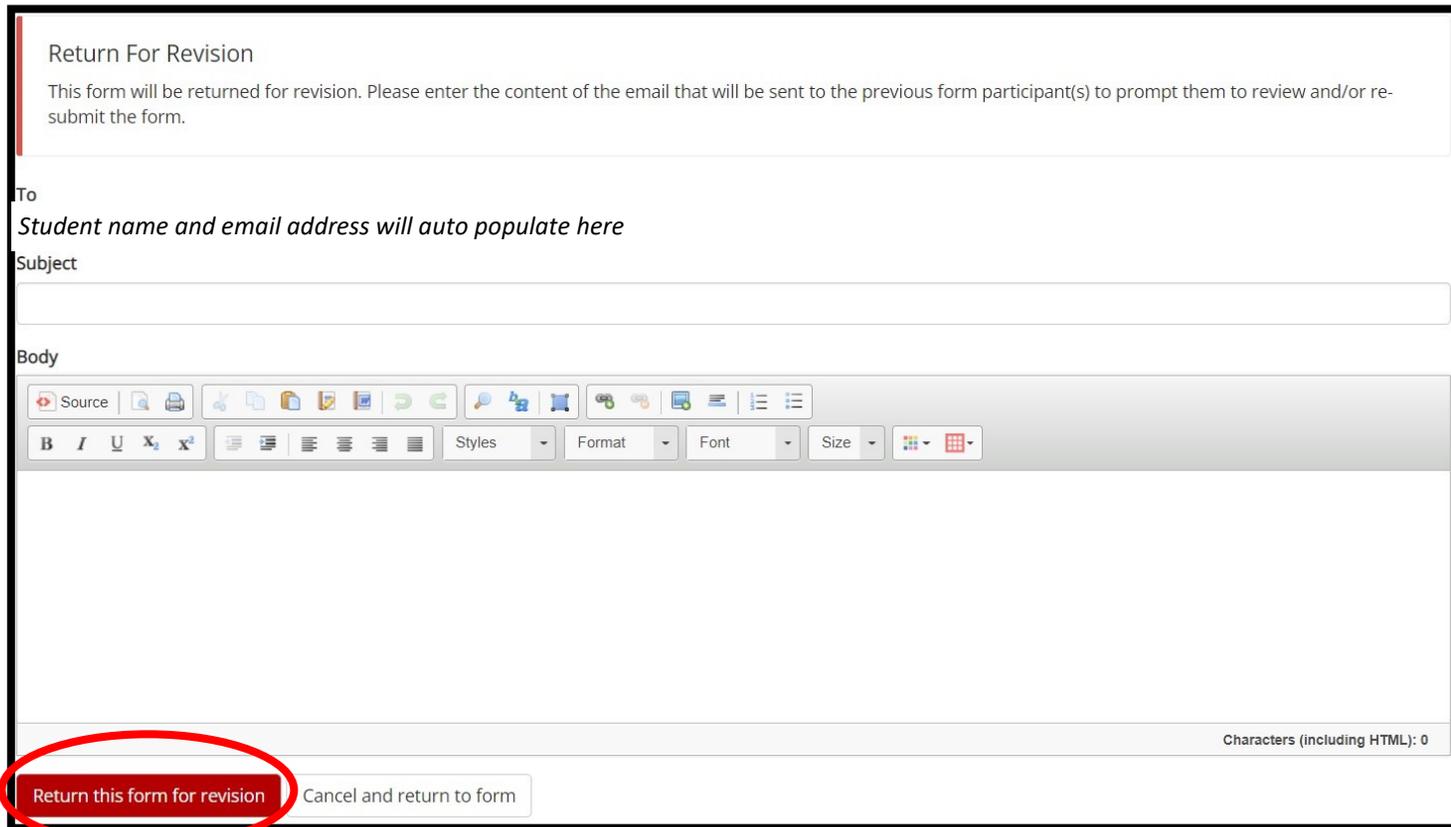


The screenshot shows a form with a signature line and a date line. The signature line is labeled "Parent Signature" and the date line is labeled "Date". Below the signature line, there is a note that says: "Remember to hit the Submit button when you have completed and signed the form." and "The Save feature is only if you want to save your input progress to complete the form at a later date." At the bottom of the form, there are three buttons: "Save Progress", "Return for Revision", and "Submit Form". The "Return for Revision" button is circled in red.

Once you click this option, another screen will pop up in an email format to the student.

The email screen will ask you to enter a Subject and Body of text. This is where you need to explain to the student what needs corrected.

This is what the email screen will display:



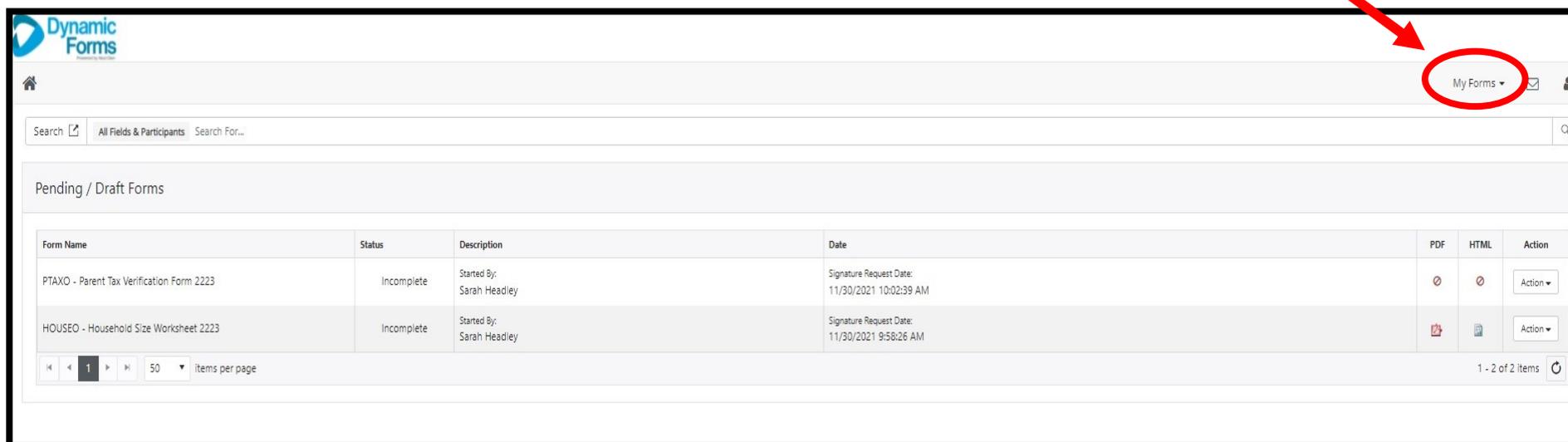
The screenshot shows an email composition interface. At the top, the title is "Return For Revision". Below the title, a message reads: "This form will be returned for revision. Please enter the content of the email that will be sent to the previous form participant(s) to prompt them to review and/or re-submit the form." The "To" field contains the text "Student name and email address will auto populate here". The "Subject" field is empty. The "Body" field is large and empty, with a rich text editor toolbar above it. The toolbar includes icons for source, print, undo, redo, link, unlink, insert link, insert image, insert video, insert audio, insert table, insert code, and list. Below the toolbar are dropdown menus for Styles, Format, Font, and Size. At the bottom right of the body field, it says "Characters (including HTML): 0". At the bottom of the form, there are two buttons: "Return this form for revision" (highlighted with a red circle) and "Cancel and return to form".

Once you've described what needs changed on the form to the student in this email body, click the "Return this form for revision" button to send it.

If you decide that the form doesn't need revision, hit the cancel and return to form to be directed back to the form.

Once the student submits their corrections, you will get a new email with the link to complete your section of the form again.

If you want to view a recently submitted form, you will need to select My Forms option at the top of the Dynamic Forms inbox page. This will display the different inboxes you have.



The screenshot shows the Dynamic Forms interface. At the top left is the 'Dynamic Forms' logo. In the top right corner, there is a navigation bar with a home icon, a search bar, and a 'My Forms' dropdown menu. A red circle highlights the 'My Forms' dropdown, and a red arrow points to it from the right. Below the navigation bar is a search bar with the text 'All Fields & Participants' and 'Search For...'. The main content area is titled 'Pending / Draft Forms' and contains a table with the following data:

| Form Name | Status | Description | Date | PDF | HTML | Action |
|---|------------|------------------------------|---|-----|------|----------|
| PTAXO - Parent Tax Verification Form 2223 | Incomplete | Started By: Sarah Headley | Signature Request Date: 11/30/2021 10:02:39 AM | | | Action ▾ |
| HOUSEO - Household Size Worksheet 2223 | Incomplete | Started By: Sarah Headley | Signature Request Date: 11/30/2021 9:58:26 AM | | | Action ▾ |

At the bottom of the table, there is a pagination control showing '1' of 50 items per page and '1 - 2 of 2 items'.

You will want to click on Forms History if you are looking to find all your recently submitted forms.

This will display the Forms History inbox which has all the forms you have submitted that have already been processed.

You can sort the forms by clicking on the heading "Form Name" or clicking on "E-Signed Date" to sort by date you submitted the form.

You can also view the submitted form by clicking on the PDF symbol to the right of the form.

You can not change a form once it has been submitted. If you have questions about this, please contact our office.

We hope these detailed instructions help you with your UCA Dynamic Forms. If you have additional questions or concerns, please feel free to contact us.