FinalForms Playbook

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Manage > Student

Student Documents

Uploading documents to Student (such as Physician Physical forms or permission slips) can streamline processes, reduce burden, and ensure documents are accessible and organized.

Quick Reference:

- Uploading Documents
- Editing Uploaded Documents
- Managing Documents (Additional Options)

Managing of Student Documents is available to Staff with Administrative Privileges.

Uploading Documents

1. Click ▤ **Manage** > **Students**.
2. Click the 📂 icon in the student's row, under **Actions**.
3. Select the "Document Type" from the dropdown and click 📂**Upload Document** to navigate to file.
   - Alternatively, you can drag-and-drop the file if you already have it available.
4. Once completed, you will presented with the message:
   "*FirstName LastName*'s document "filename.filetype" was successfully uploaded."
5. Click Close to exit the window.

Editing Uploaded Documents

1. Click ▤ **Manage** > **Students**.
2. Click the 📂 icon in the student's row, under **Actions**.
3. Click the ☑ Edit button for any given document.
4. Modify the *Edit Document* fields and settings, as necessary.
5. Click Save when finished.

Aaron Abbott Documents

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Upload New Documents (Drag-and-drop uploading is supported)

-- Select Document Type -- ▾   📁 **Upload Document**

Uploaded	Medical Action Plan Documents (These documents will be linked on the ECard)	
8/22/2022	📄 Asthma Action Plan.png	📄 ✏️ 🗑️

Edit Document

Filename: Asthma Action Plan   PNG

🔗 View Document · Last uploaded Aug 22, 2022 - 2:54pm

Category: Medical Action Plan   ▾

Manage Categories

Permissions: ☑ 👤 - Let parents view this document.

☑ 👤 - Let non-admin staff view this document.

☑ 👥 - Let parents rename / overwrite / delete this document.

Archived: ☐ 🗃️ - Archive this document.

Reviewed: ☑ 📂 - This document has been reviewed

Marking this document as reviewed will automatically remove the ability for parents to rename / overwrite / delete this document.

Save   Show History   Show Versions

Show Deleted Documents   Download All   Close

Document Options

- **Filename:** Revise the name of an uploaded file (helpful when someone uploads an image from a mobile device).
- **Category:** Select from our standardized categories or click Manage Categories to add additional selections.
- **Permissions**: access-based restrictions that can be set per-document.
  - Let Parents view a document.
  - Let non-admin Staff view a document (Coaches, Teachers).
  - Let Parents rename/overwrite/delete a document.

  > *IMPORTANT:* Unless an Admin restricts a documents access, a student's document can be viewed by the student's parents and the student's coaches.

- **Archive:** Archived documents, by default, don't appear in the default listview of Documents.
  - At the start of a school year, all documents over a year old are marked *archived*.
  - Click the Show Archived Documents (1) link to access archived documents.
- **Reviewed:** Marking a document as *reviewed* will automatically remove the ability for parents to rename/overwrite/delete the document.
- Show History **and** Show Versions buttons:
  Show Editor/Date and Action(s) taken and File Versions overwritten.

Managing Documents (Additional Options)

1. Click 📋 **Manage** > **Students**.
2. Click the 📂 icon in the student's row, under **Actions**. Once opened, you can:
   - Click 📥 to replace/overwrite the latest file version.
   - Click 🗑 to delete the document.

   > *IMPORTANT:* Documents are not 100% deleted, they are instead retained in
   >
   > Show Deleted Documents

   - Click Download All to receive a .ZIP of all current, non-deleted Documents.

Aaron Abbott Documents

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Upload New Documents (Drag-and-drop uploading is supported)

-- Select Document Type -- ⌄   📂 **Upload Document**

Uploaded	Medical Action Plan Documents (These documents will be linked on the ECard)	
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Show Deleted Documents   **Download All**   **Close**