

Create a New Document

You may create new documents for:

- Students you have access to, and
- Forms you have "Is Owner" permission for

Your student and form permissions are set at an administrative level based on your user role and building(s). If you do not see a student you have an educational interest in returned when searching students, or a form you need to create from the **Students/create new** dropdown described below, contact a user with administrative access within your district.

Document creation

Steps *To create a new document:*

1. Click **Students / create new** in the left menu.
2. Search for the student you wish to create a document for. Click the student name. You will land on their **Documents** tab and see their documents you have access to.
3. Click the **Create new** dropdown and select the form you would like to create.
4. Click the **Create** button. You will automatically be redirected to the new document.

Q Tip For many form types, the system will not allow multiple documents of the same form type to be open for a student at a given time. For example, if an IEP is incomplete for Billy, another IEP cannot be started for him until the current one is marked complete. If you try to create a new IEP for Billy, you will see a message stating there is already an incomplete document using the form. Depending on your access to documents for this student, you may or may not be able to see the incomplete document. If you require access to the document already in progress, you can request document access

Bulk creation

Steps *Steps to create documents in bulk:*

1. Navigate to the **Students / create new** page.
2. Select the students you wish to create a document for.
 - You can search by a list of student IDs to search for multiple students at once or you can use any of the filters to help narrow down your search.
3. Select all students you wish to create documents for. If you want to select all listed students, click on the select all checkbox in the top left corner.
 - If there are more than 50 students listed, you will need to click **Select all (#) students** at the top of the screen.
4. Click on the **Actions** menu and select **Create Document**.
5. In the **Bulk Create Documents** popup, choose which document to create.
6. Click **Create (#) Documents**.

After you create the documents, there will be a message at the top of the screen informing you how many documents were created and if there were any errors. Potential errors include:

- The student already has an incomplete document of the selected type
- The user does not have permission to create the selected document in the student's building

Tip It can be helpful to use the **Deadlines** filter to search for students to bulk create a document for.