University of South Carolina Programs Involving Minors
Dynamic Forms Setup and Preparation

Forms for Programs Involving Minors are available through Dynamic Forms, an online platform approved by USC for completing electronic forms, collecting e-signatures, and storing form data. Activated forms can be completed by anyone using a web browser. Areas posting forms for programs involving minors must use **only** the officially approved forms.

The process for acquiring and preparing forms for distribution in Dynamic Forms is described below. In summary, the steps are:

1. Set up Dynamic Forms
2. Prepare Organizations (in Dynamic Forms)
3. Prepare Users
4. Obtain the Forms
5. Prepare the Forms
6. Copy the Forms
7. Activate the Forms
8. Share the Forms

Forms are copied as templates into individual organizations within Dynamic Forms, where they are activated for use. Program directors and their associates are granted access to view submitted forms for specific Organizations. Users may only view submitted data for the organizations to which they are assigned.

Form users complete forms electronically, then e-sign and submit them. Users may save their progress and return later to complete and submit the form. Alternatively, users may opt out of e-signing and save the form as a PDF for completion by hand.

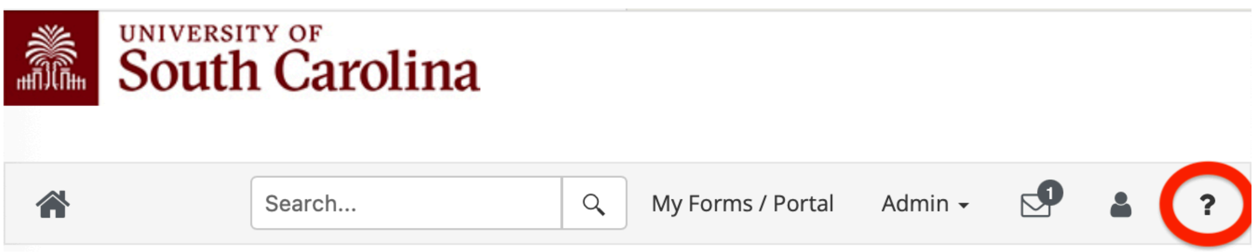
Each area distributing forms through Dynamic Forms must designate a Dynamic Forms Administrator. This person is responsible for completing the steps outlined below.

Set up Dynamic Forms

1. The Dynamic Forms Administrator should obtain a license from USC Software Distribution ($0).
   https://my.sc.edu/software/work/workSoftware.php?softwareID=266&versionID=1666

2. The Dynamic Forms Administrator can then log in to the Dynamic Forms Admin Portal using their USC Network ID.
   https://dynamicforms.ngwebsolutions.com/casAuthentication.ashx?InstID=abef1d20-7cf9-4537-9149-b3df24e1e772&targetUrl=https://dynamicforms.ngwebsolutions.com

3. Use built-in Help to learn about Dynamic Forms.

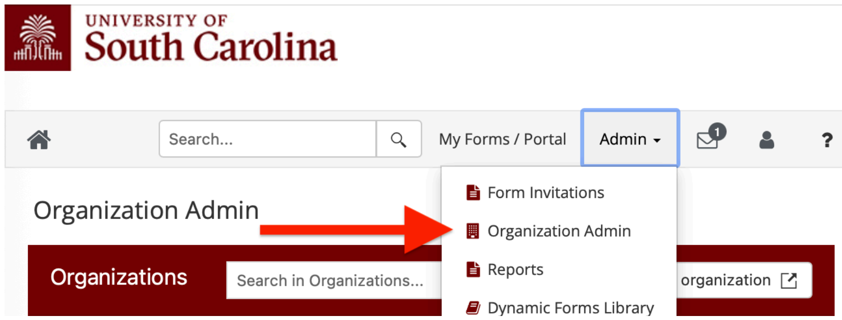


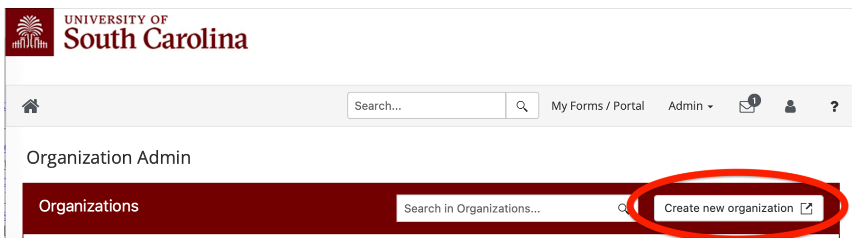
4. The following topics are recommended before moving on, to become acquainted with the admin portal and the various Dynamic Forms features.
   What is an Organization?
   Adding & Editing an Organization
   Organization admin settings
   Creating User Accounts
   Multifactor Authentication
   User Permissions
   Organization Admin Page Overview
   Organization Admin Home Page Video
   Reviewing/Processing Forms as an Admin
   Admin Queues
   Viewing Warehoused Forms

5. To learn more about creating new forms and editing existing forms, review all topics under the **Building Forms** and **Form Page Items** sections in the built-in Help.

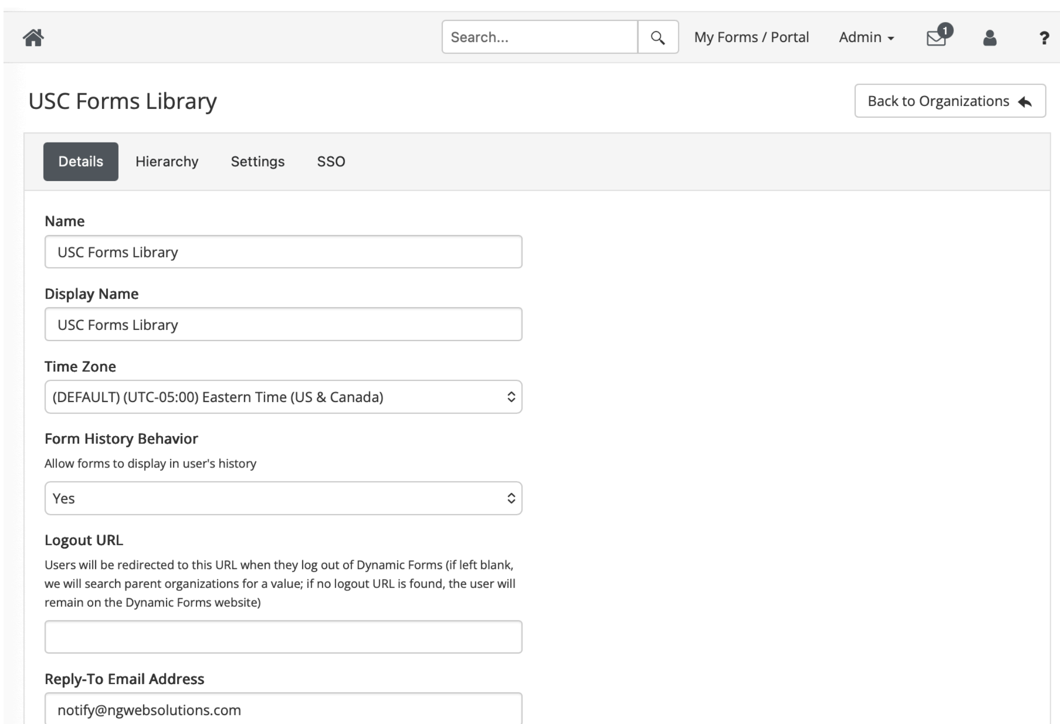
Prepare Organizations

1. Create an Organization for each Program that needs to collect forms for a program involving minors. Admin menu > Organization Admin > Create new organization button. You must have Organization Admin rights for the organization you select as the Parent Org.





2. Edit each Organization created.



1. **Name and Display Name** –Be consistent with organization names. A recommended naming convention is “*USC – Area Name, Program Name*.”

2. Confirm the Time Zone is accurate, update if needed.

3. "Allow forms to display in user's history" should be set to Yes.

4. Consider entering the area’s website in the **Logout URL** field. If this field is left blank, users remain on the Dynamic Forms logout screen when exiting the system. If an area website is entered, users are redirected to that site upon logout. If your area posts URLs for active forms, enter the URL of the corresponding webpage.

5. Enter an email address in the **Reply-To Email Address** field. Do not leave this field blank; otherwise, form users will be unable to reply to email notifications generated by form submissions. You may wish to create an email-enabled resource account specifically for this purpose (for example, area_forms_support@email.sc.edu).

Prepare Users

1. Create user accounts and assign access rights for each organization where users need access to submitted form data. Most areas will require one Dynamic Forms organization for each program involving minors. Program directors and their associates should be granted **Form Review** access to their respective organization. Users who will edit forms must also be granted **Form Design** access (see User Permissions under Help).

2. Create Users and assign permissions by clicking Admin menu > User Admin. See "Creating User Accounts", "Multifactor Authentication", and "User Permissions" under Built-in Help.

Obtain the forms

1. If a **Forms Library** organization does not already exist, create one named "**USC – *Area_Name* Forms Library.**" Then, send a request to Greg Cherry (CHERRYG@mailbox.sc.edu) to add Jason Trenary (jtrenary@sc.edu) and Ryan Webber (RWEBBER@mailbox.sc.edu) as administrators for this organization.

2. Request the programs-involving-minors forms from Jason and Ryan. They will copy the forms into the "**USC – Area_Name Forms Library**" organization for your area.

3. There are three available forms
   Programs for Minors - Consent, Waiver, Disclosure and Attestation Form
   Programs for Minors - Off-Campus Activities Form
   Programs for Minors - Participant Code of Conduct Form

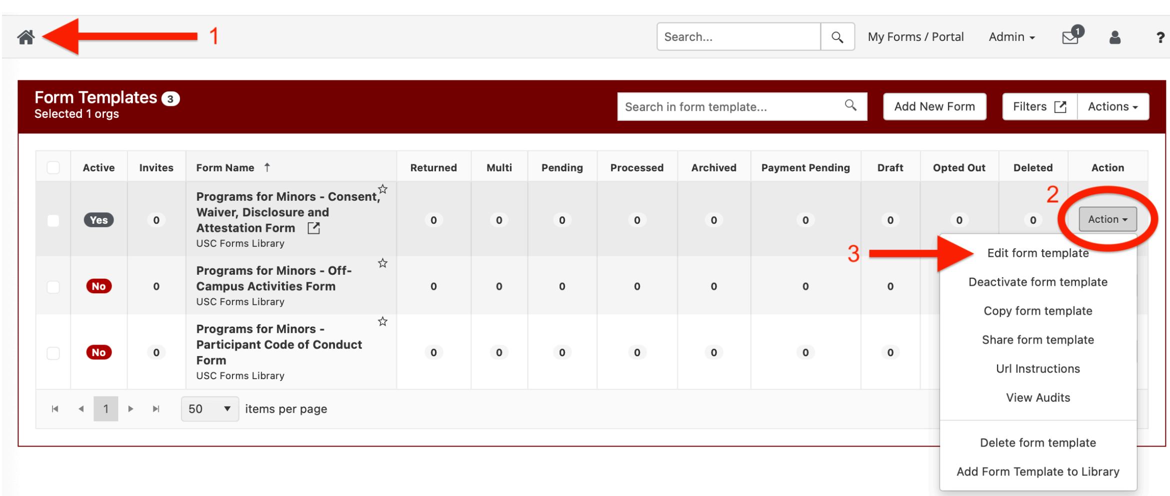
Prepare the Forms

Determine whether it is best to complete steps 2 & 3 **before** or **after** copying the forms to individual organizations. If each organization will be managed by different people, complete steps 2 & 3 after copying. If a single group—or even a single individual—is responsible for all organizations, complete steps 2 & 3 before copying.

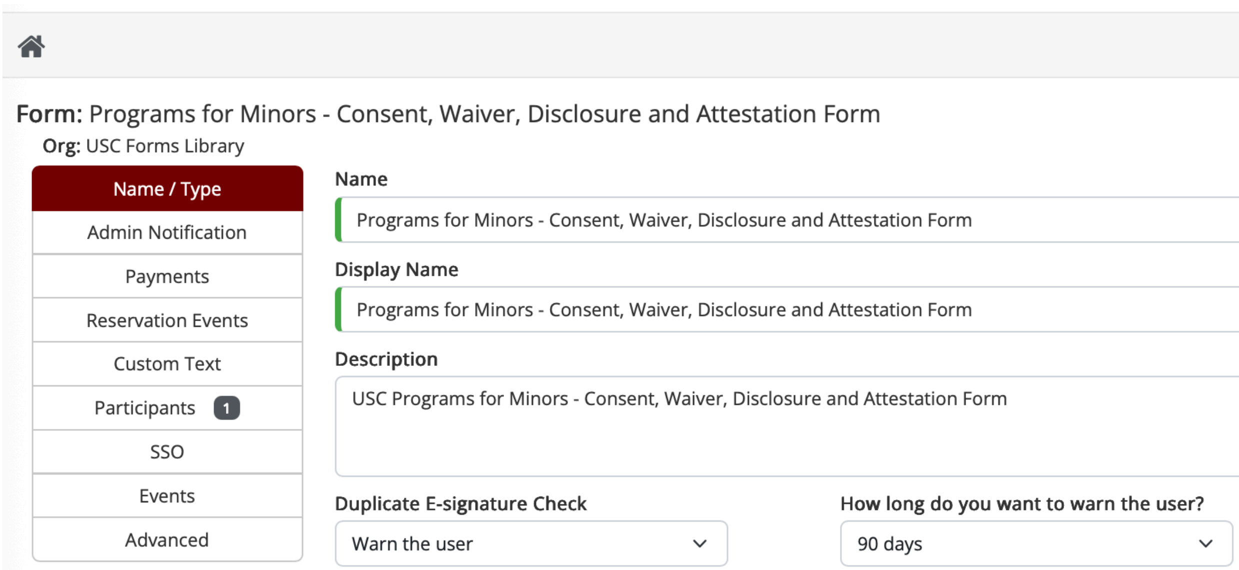
Regardless of your decision, **Steps 1 & 4** must be completed **after** copying.

Click the **Home** button (top left) to view the forms. If you do not see the copied forms, click the **Filters** button, select the "**USC – Area_Name Forms Library**" organization, and click **Apply**.

Click the Action button > "Edit form template".



Use the navigation buttons to make the following edits.



1. **Name/Type** - Update Form Name
   Update the Name, Display Name, and Description to reflect the specific local program. The Display Name is used in all email notifications.
   Example: "*USC String Project – Participant Code of Conduct Form 2026*"

2. **Admin Notification** - Update Notification email recipients
   Enter the email address of the person or group that should receive notifications when the form is submitted. This email should reach those responsible for viewing and processing submitted forms.
   Reminder: Users must be created and assigned appropriate permissions before they can log in and view submitted forms (see Prepare Users above).

3. **Participants Tab** (OPTIONAL)
   When form users submit the form, they receive an automated email notification. You may customize this email to include local contact information.

   1. Click the **Edit** button for the **Owner**. (The Code of Conduct form has two participants, so edit both the **Owner** and the **Participant**.)

   2. In the Edit box, locate the following text
      "PLEASE NOTE: This message was automatically generated. Do not respond to this email address; it is used only by an automated system and is not monitored for responses."

3. Replace it with:
   "PLEASE NOTE: This message was automatically generated. For assistance, please contact FirstName LastName <person@domain.edu>."

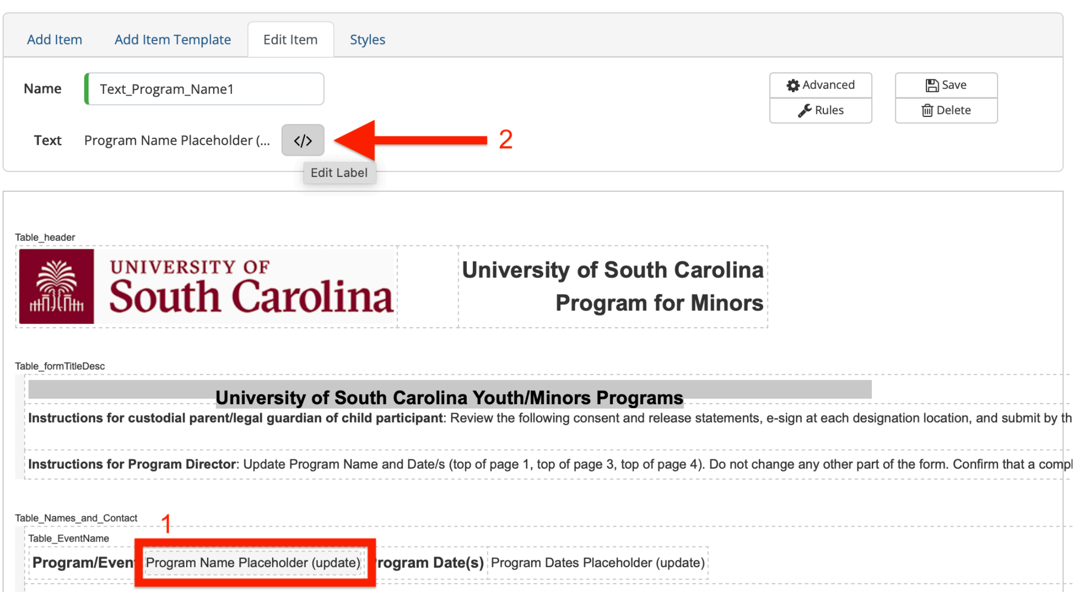
4. **Update Form Pages**
   Each form requires a few minor edits before it is ready for activation. Required edits are listed at the top of each form in the header section titled “Instructions for Program Director.” To edit a form, the logged-in user must have Form Design access rights.

   After completing the required edits, delete all text in the “Instructions for Program Director” section to ensure a professional presentation.

   Use the Page 1, Page 2, etc. buttons to navigate through the form.
   Do not alter form pages in any way other than what is specified in the Program Director instructions.

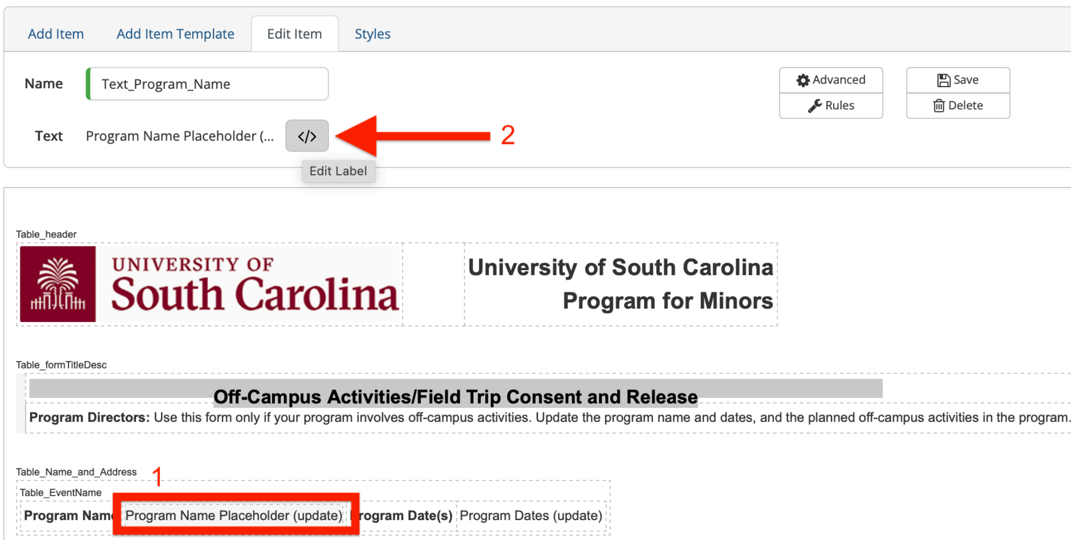
   1. Consent, Waiver, Disclosure and Attestation Form
      Required Edits

      1. **Update Program Name and Date/s - Pages 1 and 3**
         To make these edits, click Page 1/Page 3
         Click the text inside the table that reads
         "Program Name Placeholder (update)" or "Program Dates Placeholder (update)"
         Click the "Edit Label" button.
         Update the text and click Save



2. Off-Campus Activities Form
   Required Edits

   1. **Update the program name and dates, and the planned off-campus activities in the program.**
      To make these edits, click Page 1
      Click the text inside the table that reads
      "Program Name Placeholder (update)" or "Program Dates Placeholder (update)"
      Click the "Edit Label" button.
      Update the text and click Save

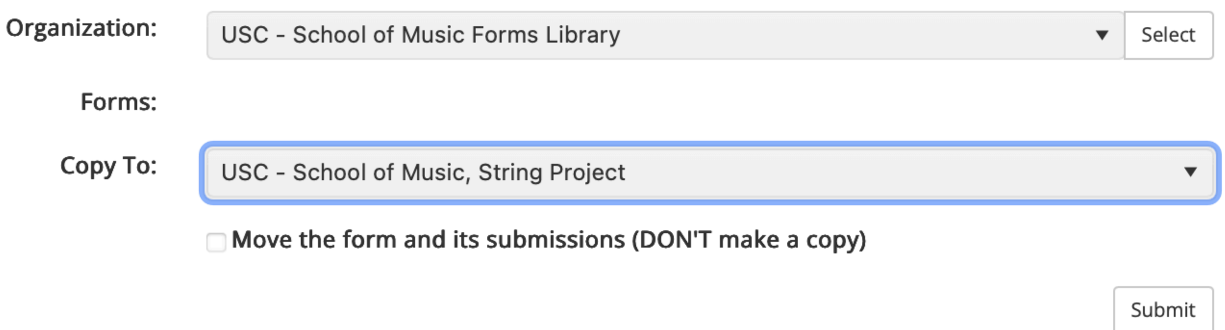


3. Participant Code of Conduct Form
   Optional Edit
   At the top of Page 2, there is a field for entering the program name. As configured, this field can be completed by form users, or it may be removed and replaced with static text.

Copy the Forms

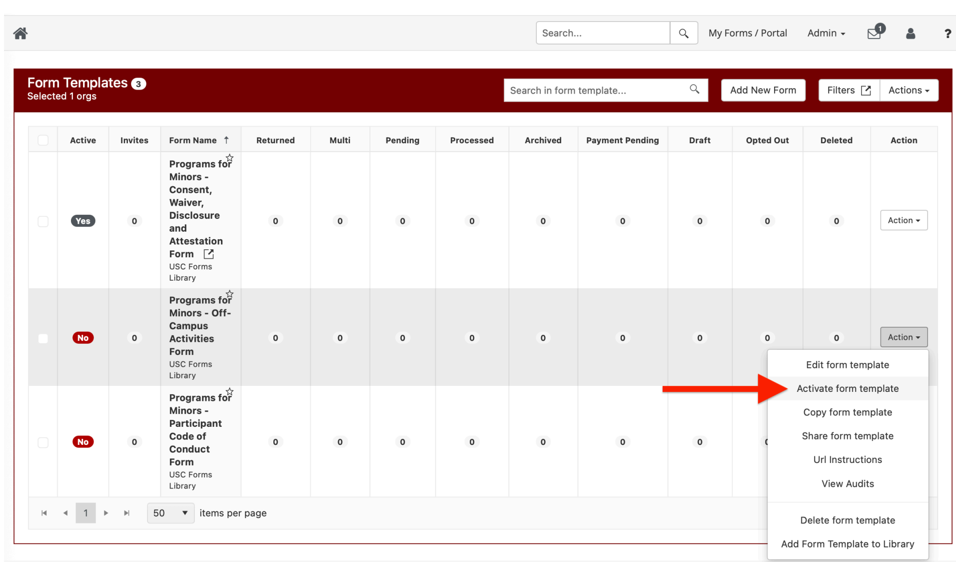
Keep in mind that each form must be prepared before it is activated. Determine whether it is best to complete steps 2-3 listed above **before** or **after** copying the forms. Steps 1 & 4 must be completed after.

Click Admin menu > System Admin > Form Migration
Select the "USC - *Area_Name* Forms Library" under the Organization menu
Select the desired Organization under the "Copy to" menu.
Do NOT click "Move the form..."
Click Submit
(repeat as needed)



Activate the Forms

Once the forms have been edited and copied to the organizations where they will be hosted, they must be activated within each organization. Use the **Filters** button to display forms within the appropriate organization. To activate a form, click **Activate Form Template** under the **Action** button. This step must be completed individually for each form.

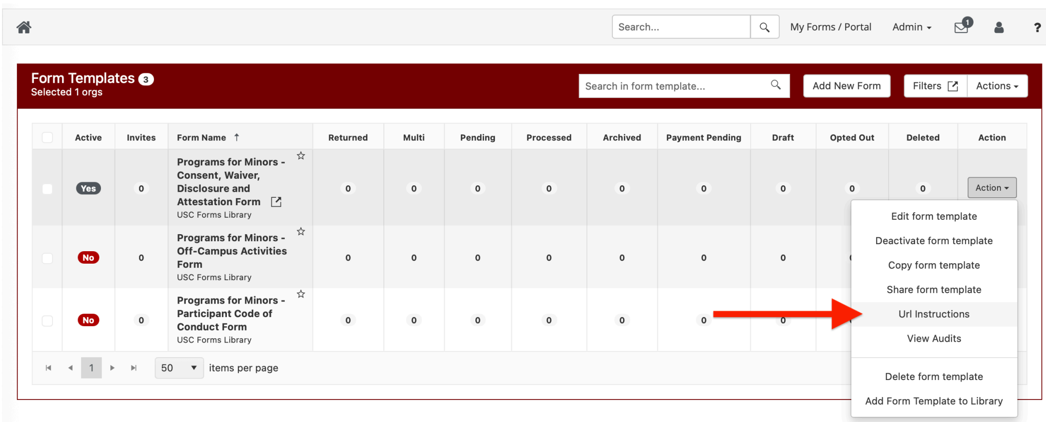


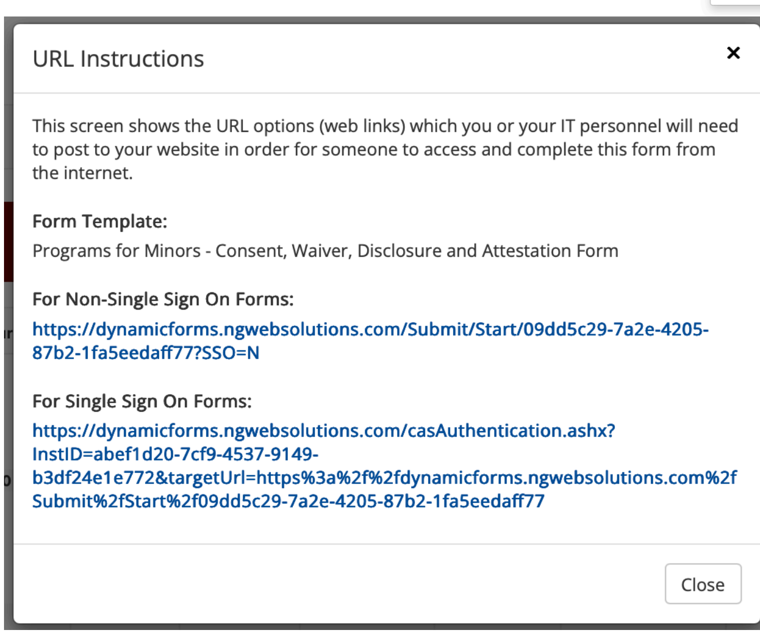
Share the Forms

Forms are shared by providing either an **SSO URL** or a **non-SSO URL** to form users who must complete the form. These URLs may be posted on a website or shared directly via email, as needed. Dynamic Forms also offers additional options for inviting specific individuals to complete a form (see **Invitation** in the built-in Help).

How a user accesses a form determines the required login method. **SSO URLs** are accessible only to the USC community and require a USC Network ID. Users without a Network ID must use a **non-SSO URL** and log in with their personally created Dynamic Forms account.

Click **Action > URL Instructions** to view both URL types, then copy and paste them to the location you choose for sharing.





For assistance, contact Jason Trenary via email or Microsoft Teams (jtrenary@sc.edu).