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# Microsoft Forms Schools Guide

March 2021

V4.0

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## 1. Sign into Microsoft Forms

Create surveys, quizzes, and polls, and easily see results as they come in.

- Invite others to respond to your form using any web browser, and even on mobile devices.
- Use built-in analytics to evaluate responses as they're submitted.
- Export form data, such as quiz results, to Excel for additional analysis or grading.

**Click: Sign in** - using your Office 365 School credentials (Outlook.com)  
<https://forms.office.com/>

**Note:** Sign-in experience may be slightly different between users and even for the same user on different days. Sometimes you will be auto-signed in (for instance if you are already using other Microsoft applications) and on other occasions you may be asked you to select which account you wish to use first or be asked to sign in from scratch

## 2. Accessing a linked shared form template

You can create a form from a link to a pre-existing form template. The Training and Support Team have created two versions of a New Starter Form for you to work from:

### Simple version

[https://forms.office.com/Pages/ShareFormPage.aspx?id=s46aQhAyGk6qomzN4N2rxTOcgF2-IL5KICrnrL-Eo\\_pUQkiWMEQzMU9KQzNBTTBRMDIOODVSU0q0Qi4u&sharetoken=TvdqToY4MaNC6MaJe1ai](https://forms.office.com/Pages/ShareFormPage.aspx?id=s46aQhAyGk6qomzN4N2rxTOcgF2-IL5KICrnrL-Eo_pUQkiWMEQzMU9KQzNBTTBRMDIOODVSU0q0Qi4u&sharetoken=TvdqToY4MaNC6MaJe1ai)

### Branched (more complex) version

[https://forms.office.com/Pages/ShareFormPage.aspx?id=s46aQhAyGk6qomzN4N2rxTOcgF2-IL5KICrnrL-Eo\\_pUMzZJUFE2N0pITEVSWFpHMu5TNU8wMUZKOC4u&sharetoken=V2G7ivj3DQJSGITb1yvn](https://forms.office.com/Pages/ShareFormPage.aspx?id=s46aQhAyGk6qomzN4N2rxTOcgF2-IL5KICrnrL-Eo_pUMzZJUFE2N0pITEVSWFpHMu5TNU8wMUZKOC4u&sharetoken=V2G7ivj3DQJSGITb1yvn)

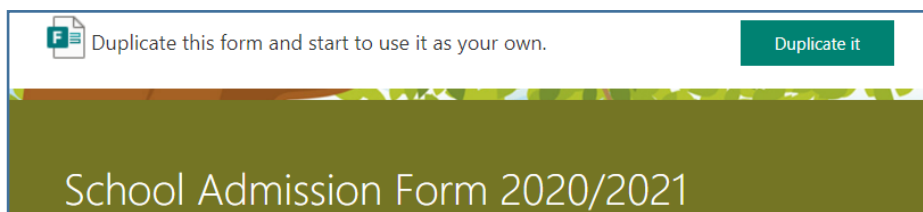
The forms linked here are generic and will need to be copied and **created specifically for your needs**.

**Please check the questions carefully.** Some questions may not be appropriate for your school and can be deleted, other questions may be added. More care is needed for the Branched version of the questionnaire as changes to the questions may change how it works.

- Parental consents should either be deleted, added to or reworded to suit your school
- You might wish to re-word the FSM question to encourage parents to claim

Please don't hesitate to contact the School Training and Support Team for further assistance

To make your own, new version of the linked form – **click on ‘Duplicate it’**



The form will open

- As soon as you start to make any changes, for example click into the title and change the title, then click down into the next question - you will see at the top of the page the form has saved...

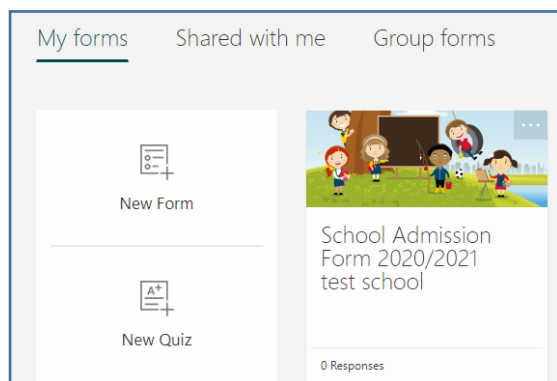
School Admission Form 2020/2021 test school - Saved

You need to

- **Check all the questions/question format are relevant** to your school and
- **Add your own school website links** for privacy notices and policies etc.

At top left of the page you can see the word **Forms**

- If you click on this now you will not see your saved form, but if you close out of Office Forms then go back in again you can see the form saved on screen, under My Forms which is where Forms opens up:



You can make changes to this form as you wish, and this is what schools will need to do with the New Starter form – the way to do this is similar to creating a Form from scratch; it is a very simple process.

- **Hover over a question you wish to change – it goes blue – click on it**

You can then overtype a question to change the wording, and change whether it is mandatory or not by clicking on the radio button 'required' or you can click on the Dustbin icon to delete it, and use the arrows to change its position in the set of questions but this can be problematic.

You cannot change the type of question it is here – i.e. from 'Text', to 'Choice', (more info below) you would just delete this existing question and add a new question.

- To **Add a new question**, follow the guidance in section 3
- If you wish to amend the **Parental Consents** question with options **see Appendix 3**

**Note:** Each form must be unique; for each admission round in this example the school must copy and rename the form to ensure the responses are kept separate, year by year.

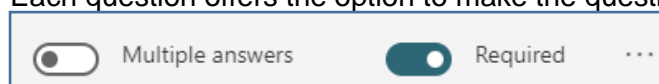
- **At the end of the admission process you need to save the final excel sheet with the year stated for data retention purposes.**

### 3. Create a new Form

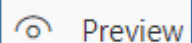
Once you have signed into Microsoft Forms, top right click on the chevron next to



- Overwrite Untitled Form with a Title for your form. You can also enter an optional subtitle or description for it below.
- Select **+ Add New** to add a new question to the form. If this is not your first form, it may 'recommend' questions from previous forms. Click on the X to close this if you wish.
  - You can choose to add **Choice**, **Text**, **Rating**, or **Date** questions, or click on the chevron for further options (explained in Appendix 3). In all options enter the text you want to display for the question first then
    - Choice:** Add each of the choices under option 1, 2 and more if required (this how the ethnicity question is populated).
    - Text:** provides a free text box for completion
    - Rating:** provides a star or number option, 0-10 for selection
    - Date:** provides a calendar or text option to enter a date
- Each question offers the option to make the question mandatory '**Required**'

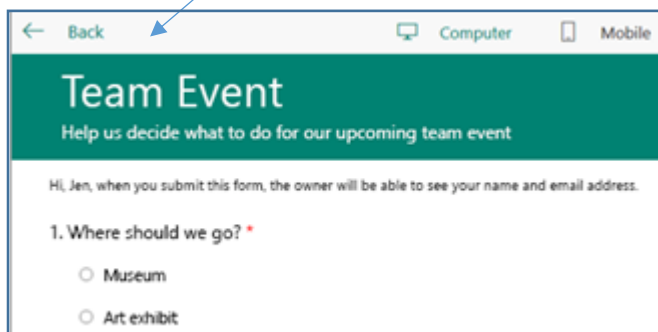


- Set to On (green) if you wish the question to be mandatory.
- **Multiple answers** enables responders to select more than one option if set to green.

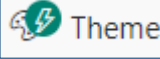
- d. Select  top right to see how your form will look

**Check views on both a computer and mobile device** by clicking to change view top right

- Click **Back** to return to the form to make changes




The form is saved to your account once you start to create it. If you want to stop working on it and return to it later simply exit Microsoft Forms. When you next log in your form will be saved for you to continue working on it, under **My Forms**.

- **Background Theme:** To add or change a background theme click on  top right. Scroll through the available themes and click to select
- To **delete a question**, click into the question and click on the Dustbin Icon
- If you wish to add a new question with options, such as the **Parental Consents** question **see Appendix 3**
- **Branching** i.e. *the next question changes according to the responses to the initial question; questions only appear if they are relevant. If the questions don't apply, the responder is redirected to a different question or will skip a set of questions altogether.* If you wish to use Branching for some questions **see Appendix 4**

**Please note, if you decide to share your version of a MS Form with another school so they can use it too, you MUST use the 'SHARE as a TEMPLATE' LINK and NOT the 'Send and collect responses' link. If you shared the send and collect responses link in error, all the responses from that school would return into your database and this would constitute a data breach.**

## 4. Delete a Form

If you want to **delete a form** – Click on **All My Forms** (bottom right of screen)

- On the Unopened Form you wish to delete – click on the three dots
- Click on the Dustbin 

The Form tile will be visible under the Deleted Forms Tab but cannot be opened

- Click on the left facing arrow, or **All Forms** top left to return to **My Forms**

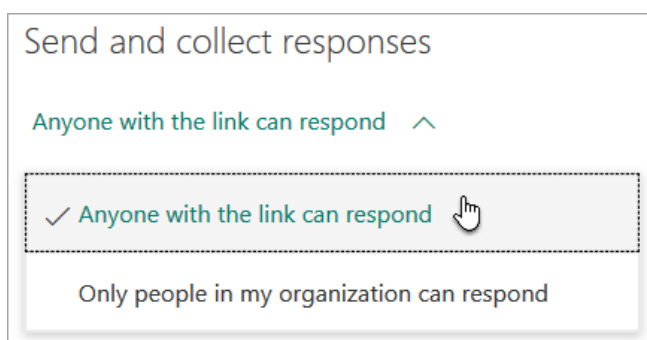
## 5. Share a form link to recipients for completion of questionnaire (i.e how a school will share the form with parents)

- In the form - Click 

By default, only people within your organization can submit responses to your form; under the header 'Send and collect responses' it defaults to 'Only people in my organization can respond'

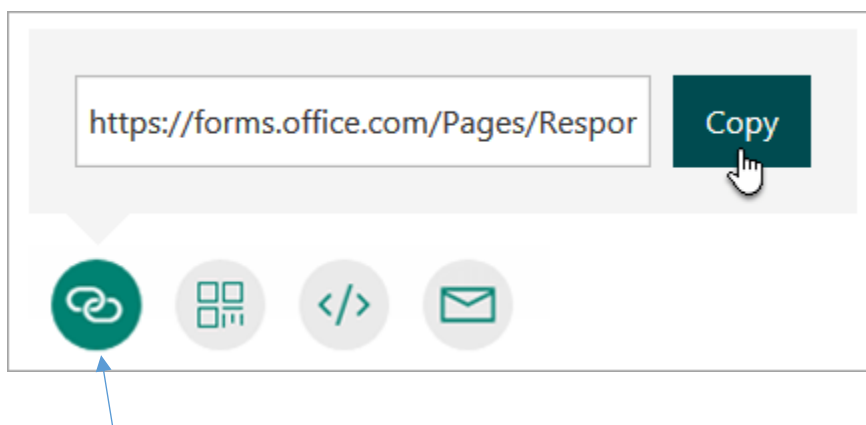
If you want to allow anyone to submit responses:

- Select from the drop-down 'Anyone with the link can respond'
- **Note:** Anyone with the link address will be able to see and complete your form. Be sure you're comfortable sharing the contents before changing this default option.



The screenshot shows a dropdown menu titled "Send and collect responses". The current selection is "Anyone with the link can respond" with an upward arrow. Below it, there are two options: "Anyone with the link can respond" (which is selected and has a checkmark and a hand cursor) and "Only people in my organization can respond".

- **Send the form link to others for completion** - There are various options available to send the form to parents for completion



The screenshot shows a text box containing the URL "https://forms.office.com/Pages/Respor" and a "Copy" button. Below the text box are four icons: a link icon (selected), a grid icon, a code icon, and an email icon. A blue arrow points to the link icon.

The **Link** button is selected by default, which gives you access to COPY the link:

- Click **Copy** next to the text box that displays the URL for the form. Paste this link wherever your intended audience can see and select it to gain access to your form

**This link could be sent via the school text messaging system if pre-admission students are included in this or via email – other options can be seen in Appendix 2**

**Note:** The Microsoft account which the form is sent from is the account that will receive the replies. If they want more than one person to access the replies, Headteacher and Business Officer for example, they will need to share the form with the relevant staff member.



**The envelope button allows you to invite participants through email**

- Select the **Email** button - your default email application opens
- Enter the email addresses of the parent/guardians you want to complete your form

**Note: If the link is sent by e-mail the school should send the links to the school email address by double clicking in the To... box and then ONLY enter the parent email addresses in the BCC box to ensure the email addresses are hidden**

The email includes a brief note created by Microsoft Forms for the recipient in the email body so they have proper context for your invitation and a link to your form, but the school will probably wish to add their own dialogue to this

- When you're ready to send your form link, select **Send**

The email has an automatic title line: **Please fill in “*name of Form*”**

**Note:** Anyone who receives the form link through email will be able to forward that email to other people where they can see and complete your form. Be sure you're comfortable sharing the contents before sending the link

**You could use the Communicate option in RM Integris to send the email link:**

**See Appendix 1** for guidance on sending the link by email through **RM Integris Communicate**

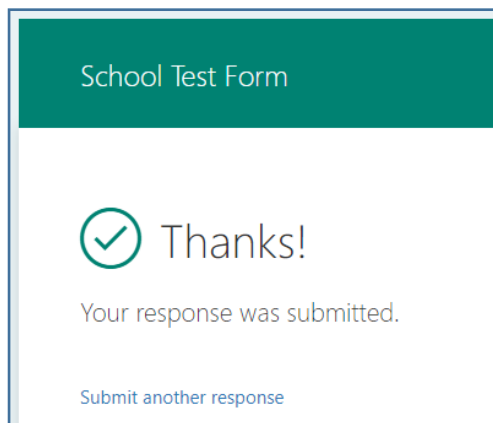
- ✓ **If RM Integris Communicate is used, the recipient email addresses are automatically hidden**

When the recipient/parent receives the link, and clicks to open it they can go through the questions and click **Submit** at the end:

- ✓ It is easy to complete on a mobile or PC
- ✓ They cannot submit until all mandatory questions are answered

When the recipient completes the form, they get an acknowledgment:





And you get a notification a response has been received.

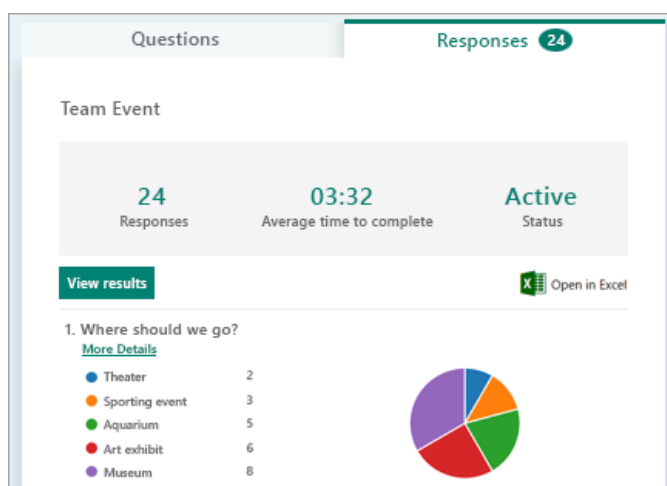
## 6. Share a form with other colleagues who need to see the data, or would like input to the creation of the form

- Open the form you wish to share
- Click **Share**, top right
- Scroll down to '**Share to Collaborate**'
- Click on **+Get a link to view and edit**
- **Click Copy** – the link is now available to paste into an email to a colleague
- 

## 7. View results in Microsoft Forms

Log back into Microsoft Forms Sign in with your Office 365 School credentials

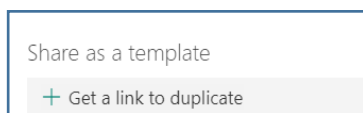
- Open the form for which you want to review the results
- Click to select the **Responses** tab
- Select **View results** to see individual details for each responder – You can select individual responders via the drop down list.
- To easily view all of the response data for your form in Microsoft Excel, select **Open in Excel**.



- Select the **More Details** link under each question to see the name of each responder in a table, and his or her answers for each question.
  - Click the **X** to close this information window
- **Print Responses** – Click the three dots between 'Active' and 'Ideas' on the Responses tab – click Print **Summary**

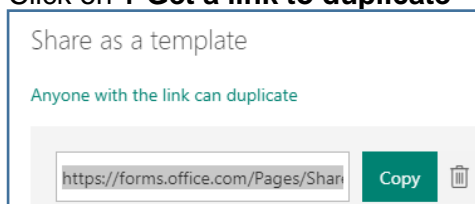
## 8. Share a form you have created to another school for them to amend and use as their own

From the form – **click Share**

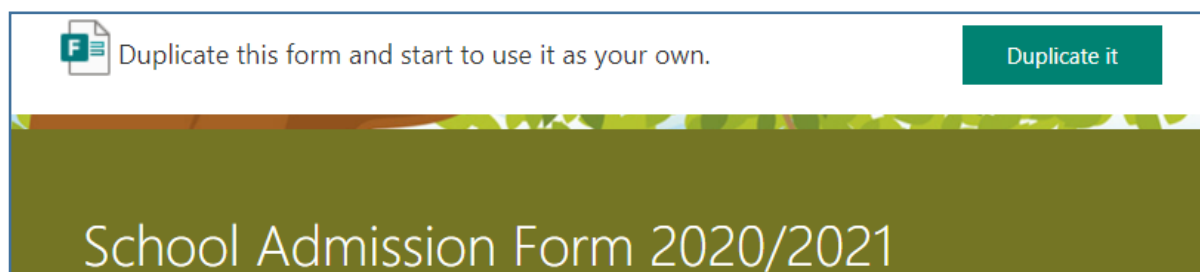


**Under Share as a template**

- Click on **+ Get a link to duplicate** – new window opens below:



- Click on **Copy**
- The link is now ready for you to paste into an email
- Send to the school (or other recipient)
- When the recipient clicks on the link it looks like this



- When they get the link, the school need to **duplicate** and create a copy. They then need to
  - **Check all the questions/question format are relevant** to them and
  - **Add their own school website links** for privacy notices and policies etc.

***You could also use this option to share a form you are working on with the Training and Support Team if you require help.***

## 9. Appendices

### Appendix 1 – Sending the link by email through RM Integris Communicate

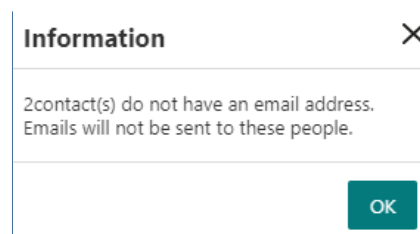
If you have imported your ATF listing your new students and have email addresses for the parents held in RM Integris you can send the URL link using communicate in RM Integris:

Go to **Modules | General | Student Details**

- Click **Find**
- Change **Roll status** to **Admissions**
- Click **Find** – you now have a list of all students on your admissions Roll
  - If you want to send the form to all these students **click Select and Yes**
  - If you only want to send the form to some of these students, use the **Ctrl Key** to highlight those individuals, **then click Select**

You now have a 'browse set' of selected student records

- Click **Communicate** (action bar top right)
- Click the radio button **'Create an Email'**
- Leave the radio button selected to **'Create Communications for all students in the browse set'**
- Click **Next**
- Click into the message panel and move the Cursor to the next line below **'Dear Salutation'** (The recipient name will be picked up from this field in the contact record)
- Type the content of your email here then **paste the URL link to the form too, using Ctrl and V keys** to paste.
- You do not need a reply to address for the responses to the questionnaire, but you may wish to put a reply to address in for any queries arising.
- Select Recipient – **Parent/Guardian 1** is selected by default and this is the field that will have been completed when the ATF was imported
- Click **Generate emails**
  - If any of the contacts do not have an email address you will receive a warning advising of this:
- Click **OK**
- A new window will then show you which contacts have not received the email – you can print this if you wish



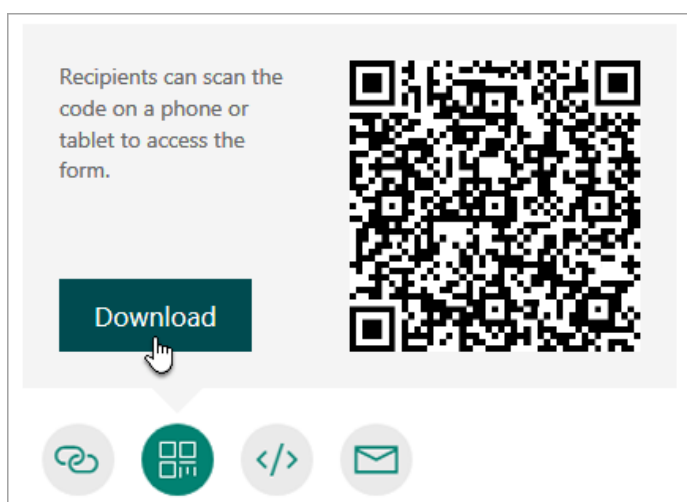
SAM may not always show an email address for the parent, and some parents may not respond and require follow-up by a phone call. Whilst this is hard initially Staff should not get disheartened because it is worth the time later when they want to send other email correspondence. Parents usually happily provide emails for admissions when they might otherwise refuse! If schools resend the same link after the initial email the response will still go to the same form.

## Appendix 2 - The other two options for sharing the link, alongside the Link Button, are:



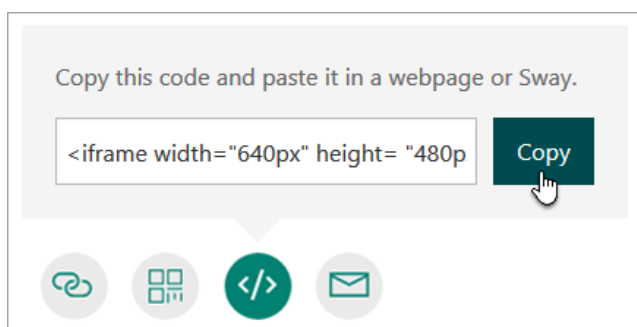
**QR code** – rather than a URL you could copy a QR code to send to participants

1. Click the **QR** button
2. Select **Download**, depending on which browser you are using the QR Code link will save to your PC. **Copy** and paste this link wherever your intended audience can scan it with a QR code scanner, such as a mobile device, to gain access to your form.



### Embed in a webpage

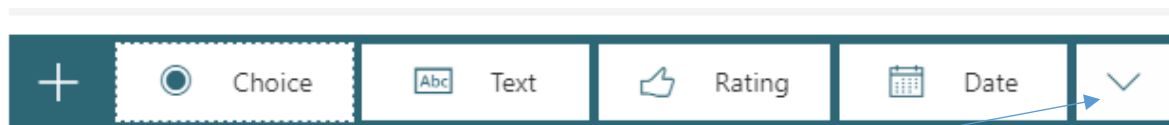
1. Select the **Embed** button.
2. Click **Copy** next to the text box that displays the embed code, and then type or paste this embed code into a blog or web page to embed your form within the document.



Consider this will be available to anyone who views your webpage, not just your intended audience.

## Appendix 3 – Adding / amending a question with options e.g. Parental Consents

As covered in section 3, when adding a new question, you get a pop-up window:



Click on the down arrow for additional options

A new window opens with additional options:

- **Ranking** – provides an option of giving something a star rating
- **Likert** - see below
- **File Upload** – 'A new folder will be created in SharePoint. Files uploaded by responders will be captured in this folder' Do you use SharePoint? – If you use this option do not set to 'Required'
- **Net Promoter Score** – Similar to Ranking, how likely are you to do something on a scale of ...
- **Section** – enables the separating of areas within the form
- Select **Likert**

**Likert definition:** a type of survey scale; a question with a series of answers to choose from, normally including a neutral option

	Option 1	Option 2	Option 3	Option 4	Option 5	+
Statement 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Statement 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

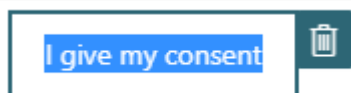
+ Add statement

- Type your 'question' in the space highlighted; this may in fact be a statement, as with parental consent:

54. Parental Consents  
You may amend or withdraw consent at any time by writing or by e-mailing the school.

These permissions should be read in conjunction with the school privacy notice and data protection PowerPoint available on the school website: <http://www.xxxxxxxxxxxxxxxxxxxxxx>

- Complete each Statement as required – e.g. Permission for child to leave school premises unaccompanied
- Complete the options as required; as you click on to each 'option' a text box opens



plus a dustbin icon to delete any unwanted options.

- There is a + icon at the end of the row of options to add additional if required
- + **Add Statement** enables you to add additional statements to the list

## Appendix 4 – Using Branching in Microsoft Forms

You can add branching to a survey so that it changes according to the responses to specific questions. In a survey that branches, questions appear only if they are relevant to the responder. If the questions don't apply, the responder is redirected to a different set of questions or will skip a set of questions altogether.

### Add branching to your form

Make sure all your questions are created initially. It makes it easier to decide where you want the branching to go.

For example, the question on the simple form asks for information on a second or additional contacts for the child, then lists many options for completion of contact data, which all responders must scroll through whether there are additional contacts or not.

Instead you could ask Do you wish to add additional contacts for your child – if yes it would take them to the boxes to complete further details and if no it would move on to the next question.

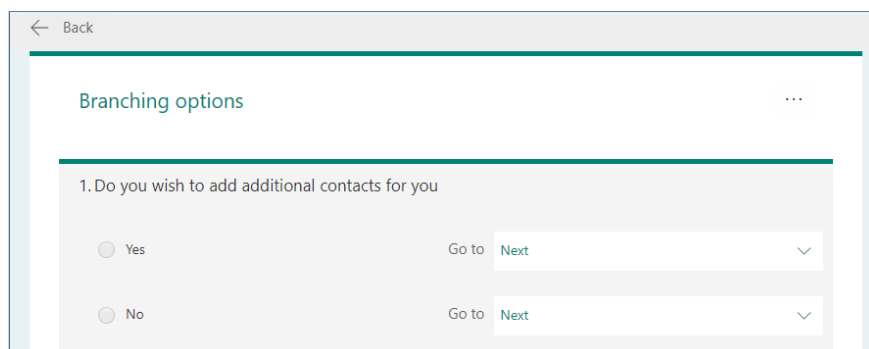
You therefore need to think about the wording for the branching question, which also needs to be Mandatory.

You may already have the question: 'Do you wish to add additional contacts for your child' or you may need to add it in before the optional questions.

- The question will need to be a **Choice** Question in this instance
- It requires two options for an answer – **Yes** and **No**
- **Required** must be set to **on**
- Multiple answers set to off

- Click on the three dots '**More settings for question** ...'
- Select **Add Branching**, from the dropdown list

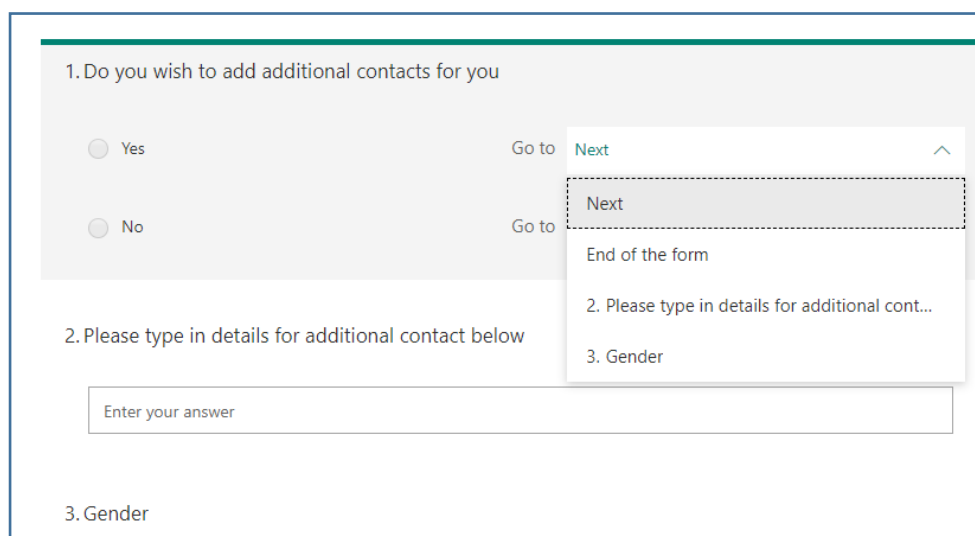
The question now goes to the Branching option page:



You can see both answers have a 'Go to' option, and the dropdown arrow enables you to select where the next question would be depending on the answer given by the responder

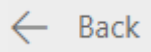
### Select the question that you want to branch to

- In this example, if a responder answers **Yes** to the first question, you send them to go on to the next question 2.
- However, if the responder answers **No** to the first question, you would branch, or skip, to question 3.

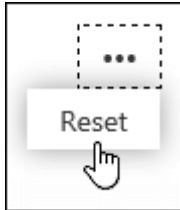


Once you have completed the branching for this question, to continue with your questionnaire

- **Click Back** – top left



If you want to completely reset your form and remove branching, click **More options** **...** , and then select **Reset**.



**Note:** When your responder is completing the form, any branched question results in the responder not seeing the remaining questions until they have answered, hence the **branching question MUST be set to 'Required'**.