

# Parent/Student Portal Settings

**Path: Management > District Level > District/Site/Year Setup > Parent Student Portal Configuration**

## Overview

Meet with district staff to develop a strategy which serves as the foundation for portal implementation, then follow-up by completing the portal configuration.

## User Permissions

In the **SIS Utilities/Management** area, **Parent/Student Portal Configure and Notify** allows a user to maintain the **Parent/Student Portal Configuration and Notification** screen.

In the **Student Database** area, **View Portal for Student** allows a user to open a parent/student portal window from the **Student Contact Summary Information** screen in order to access the **Home**, **Attendance**, and **Grades** tabs if visible to parents or students.

## Develop an Implementation Strategy

Before you extend the privilege of online student records access, your district should establish a well thought out implementation plan.

1. Establish a portal implementation date. The start of a new school year and a semester or grading term are ideal times to open the Parent/Student Portal.
2. Determine the data areas you will activate. Recommended startup areas include: Attendance history, view demographic info, and term grades. To help you visualize what information displays, logon to your Sample instance which has all areas activated. User Name: joe@barker.com  
Password: parent.
3. Consider how your district handles FERPA compliance for student records access once a student reaches 18 years of age. You may use the Student Data Grid to pinpoint students, then manually cancel portal access and re-authorize parent access if the student signs an authorization release.
4. Determine if you will incorporate add-on features.
  - **Online Payments** – In the Lunch Setup and Lunch Accounting & POS folder see *Online Payment* located on The Tyler SIS support site.
  - **Update Household Data** – In the Parent/Student Portal folder see *Update Household Data* on The Tyler SIS support site.
  - **Student Participation** – Allow students to participate, logging onto the portal with a separate User ID and password from household parents. Students view the same student data as parents, with the exception that the information does not include other students in the household.

- **Course Requests** – Open a window of time for parent/student entry of course requests used by Tyler SIS Random Scheduling process to create next year’s schedules. Parents/students can select from a pre-determined group of subjects offered, eliminating the burden of school staff manually entering requests, plus the convenience to override these requests as needed.
5. Create your portal information packet and Acceptable Use Policy.
    - Use the **Parent Portal Navigation for Parents** Word® document located in the Parent/Student Portal folder on our support portal to create a customized navigation handbook and make it available on your district website.
    - Ask your School Board to review your district policies regarding online student records access.
  6. Establish a generic district email address for returned email when Tyler SIS auto-generates an email invitation to participate. Assign a staff member to contact parents/students with invalid email addresses.
  7. The normal login page for Tyler SIS has three tabs on it: **Staff**, **Parents**, and **Students**. To ensure ease of use for parents and students, we have links available that go directly to login screens with only the tab needed. This prevents the confusion which occurs when users try to login on the wrong tab, resulting in a message saying their username is not valid.
    - For the Parent Portal, the link is:  
**<https://sdm.sisk12.com/XX/parent>**  
 XX should be replaced with your district’s Tyler SIS district code, which may be 2 - 4 characters. Self-hosted clients can adapt their URL address by adding /parent to the end.
    - For the Student Portal, the link is:  
**<https://sdm.sisk12.com/XX/student>**  
 XX should be replaced with your district’s Tyler SIS district code, which may be 2 - 4 characters. Self-hosted clients can adapt their URL address by adding /student to the end.
    - If you wish to have a link to Tyler SIS on an internal site used by staff, link directly to the login screen with all three tabs on it. This allows staff members who are also parents to have access to both logins from one place. For that link, use:  
**<https://sdm.sisk12.com/XX>**  
 XX should be replaced with your district’s Tyler SIS district code, which may be 2 - 4 characters. Self-hosted clients should use their URL address.
    - Graphics for all three of these links are available on the Documentation page on our support site in **Parent/Student Portal > Graphics**.




8. Develop a support plan for portal usage using your district website. The key is to automate portal support to eliminate individualized handling. Here are some suggestions:

- Add portal information and forms, including your registration form with your Acceptable Use Policy which parents may print off, complete and return to school.
  - Create your registration form, including the Acceptable Use Policy, and make it available online.
  - Create a FAQ library to address repetitious questions.
9. Promote portal usage.
- Distribute information letters or brochures to district households. Tyler SIS can provide you with samples to get you started or contact another Tyler SIS district in your area already using the portal.
  - Host a registration drive – Back-to-School night, PTO meetings, Parent/Teacher conferences and extra-curricular events provide excellent opportunities to promote portal participation.
  - Incorporate Portal information and forms in your school enrollment packets.
  - Elevate community awareness by distributing a news release.

## Set the Portal Years to Display and Default Year

These settings control which district years are viewed in the Parent/Student Portal. There is no limit to the number of years you may include.

Designate one of the displayed years as the default. The default year displays when the parent or student first logs on to the portal. The *current* year is typically set as the default portal year.

1. Go to **Management > District Level > District/Site/Year Setup > Year Settings**.
2. Click the **Edit** icon  for a year you wish to be included on the parent/student portal.
3. Check the **Used on Portal** box.
4. Check the **Portal Default** box for the year you wish to set as the default display. Only one year may be set as the portal default.
5. Click **Done** to save and exit.
6. Repeat this process for each district year you wish to include on the portal.
7. Click **Apply** to save and continue or **Done** to save and exit.

## Email Notification tab

This tab contains the portal activation field, school email address designated to receive undeliverable parent emails, and the email message sent to portal participants confirming acceptance of their portal registration.

1. Click **Edit**.

The screenshot shows the 'E-Mail Notification' configuration screen. At the top, there are tabs for 'Data Access', 'Family Data Fields', 'User Defined Fields For Online Registration', 'Links', and 'Student Login'. Below these, there is a 'Pick an E-Mail' dropdown menu currently showing 'school@tylertech.com'. The main area is a text box labeled 'E-Mail message to parents' which contains the following text:

Dear Parents,

Our Parent Portal is ready for you to begin using. You will be given your own unique username and password. At this time you will be able to view schedules, attendance, and lunch accounts. We will be adding more options to the portal in coming weeks. To access the portal:

1. Go to our Website, www.educate.k12.tn.us
2. Click Parents on the navigation bar
3. Click SIS Parent Portal
4. Enter your unique username and password
5. Once you have successfully logged on, use the menu bar at the top select your child and the area that you would like to view.

2. Type the Return E-Mail address. This address is used for all emails that are undeliverable. This address may or may not be your district SIS tech coordinator. Consider creating a generic school email address and assign a school staff member to monitor it. Parents who list undeliverable email must be notified of their invalid email address.
3. In the **E-Mail message to parents...** text box, type your introductory message to parents. This is a generic acceptance message with instructions to access the portal. It should include the school website or URL for the portal and instructions for accessing the portal. The field has a maximum of 1,000 characters. If you wish to provide more comprehensive instructions, distribute this separately.
4. When you are ready to publish your data, check the **Send e-mail to parents for Portal access** box. This enables you to send notification emails to parents every time a new family record is created with the fields **Email Address** and **Parent Portal Agreement Date** completed on the **Family Registration Primary Parent** tab or **Family Alternate Parent** screen.

The screenshot shows the configuration for the 'Send e-mail to parents for Portal access' option. The 'Email Address' field is set to 'joe@barker.com'. The 'Parent Portal Agreement Date' is set to '9/12/2006' and the 'Portal Notify Date' is set to '1/10/2007'. The 'Re-Notify Parent' and 'Cancel Agreement' checkboxes are unchecked.

5. Click **Apply** to save and continue or **Done** to save and exit.
6. On the **Family Registration** screen, you may resend the email by checking the **Re-Notify Parent** box or disable parent access by checking the **Cancel Agreement** box.

- To notify multiple families or resend the email to multiple families simultaneously, go to **Utilities > Student > Re-Notify Parents for Portal** and enter criteria for re-notification.

**Start Notification**

Agreement Date    Less Than   

Notify Date    Less Than   

Notify All Parents with Agreement Date but without Notify Date

---

Keep Current Passwords (if Parent has already been assigned a Password)

Generate a New Password for everyone in this Notification group

---

**E-Mail Message:**    To change this message go to Management > District Level > District /Site / Year Settings >Parent Student Portal Configuration.

Dear Parents,

Our Parent Portal is ready for you to begin using. You will be given your own unique username and password. At this time you will be able to view schedules, attendance, and lunch accounts. We will be adding more options to the portal in coming weeks. To access the portal:

1. Go to our Website, [www.edwards.k12.mo.us](http://www.edwards.k12.mo.us)
2. Click Parents on the navigation bar
3. Click SIS Parent Portal
4. Enter your unique username and password.
5. Once you have successfully logged on, use the menu bar at the top select your child and the area that you would like to view.

## Data Areas tab

Access by parents/students to the different areas is controlled by the school district.

Access areas include:

- |                                              |                                                                                                        |
|----------------------------------------------|--------------------------------------------------------------------------------------------------------|
| ▪ Home – Course Schedule                     | ▪ Discipline                                                                                           |
| ▪ Homework                                   | ▪ Report Card Grades                                                                                   |
| ▪ Grade Book                                 | ▪ Objective Marks                                                                                      |
| ▪ Grade Book Summary                         | ▪ Transcripts and Credits                                                                              |
| ▪ Course Change History                      | ▪ Lunch Account                                                                                        |
| ▪ 4-year Plan                                | ▪ Lunch Meal Planner                                                                                   |
| ▪ Course Requests                            | ▪ Awards                                                                                               |
| ▪ Update Household Data                      | ▪ Activities                                                                                           |
| ▪ Parent Contact access by Students          | ▪ Medical                                                                                              |
| ▪ Documents for Students and Families        | ▪ Fines & Fees                                                                                         |
| ▪ Programs and Services/ Alerts              | ▪ Assessment                                                                                           |
| ▪ IEP Alert – Display to Parents or Students | ▪ Transportation (You must have Versatrans Integration Service with Direct Access to use this feature) |
| ▪ Attendance                                 |                                                                                                        |

- If you are not already in edit mode, click **Edit**.
- Check the boxes in the rows for the data areas to be turned on. Check the **P** column to allow parents access to the information in past school years, check the **C** column to allow parents

access to the information in the current school year, and check the **F** column to allow parents access to the information in future school years.

For example: Do not check **Home – Course Schedule** on for future school years until you are ready for parents to see students’ finalized schedules. Turn **Course Requests** on for future years only.

Area	P	C	F
Home - Course Schedule	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Attendance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Report Card Grades	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Course Change History	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Course Requests	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**NOTE:** For the Assessment area, you must select which assessments and sub-tests are available in **Management > District Level > Assessment Templates**. For Grade Book, assignments display on the portal by default. The teacher may uncheck the option in the Assignment details if he/she wishes to suppress it from the portal.

3. Click **Apply** to save and continue or **Done** to save and exit.

## Family Data Fields tab

This tab allows parents to submit changes and corrections to family demographic information. Checking the box in the **Auto Accept** column indicates changes made to this data do not require review. When parents submit changes, if the only fields changed are ones marked as auto accept, the entries are automatically accepted, and the data is updated without requiring any interaction by district staff. (Note that this feature is only available when parents are using Student 360). For more information on this topic see *Review Household Data Updates from Portal* on The Tyler SIS support site. There are also options to allow parents to add new records for Household Parent 2, Nonresident Parents and Emergency Contacts.

1. If you are not already in edit mode, click **Edit**.
2. Check the boxes in the **Select** column to indicate each family data field that will be accessible to parents. Fields can be selected separately for **Existing** students or **New** students.

Area	Field Name	Select for		Auto Accept
		Existing	New	
New Family	Self-Registration			<input type="checkbox"/>
Student	Add New (Using Online Registration)	<input checked="" type="checkbox"/>	Y	<input type="checkbox"/>
Student	Re-Enroll (Using Online Registration)	<input checked="" type="checkbox"/>		<input type="checkbox"/>
Student	First Name	<input checked="" type="checkbox"/>	Y	<input type="checkbox"/>
Student	Middle Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Student	Last Name	<input checked="" type="checkbox"/>	Y	<input type="checkbox"/>
Student	Suffix	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. Click **Apply** to save and continue or **Done** to save and exit.

## User-Defined Fields for Online Registration tab

1. If you are not already in edit mode, click **Edit**.

Field Name	Description	Select
Accp-Use Comments	Accp-Use Comments	<input type="checkbox"/>
Accp-Use Current Status	AUP Current Status	<input type="checkbox"/>
Accp-Use Policy Signed Date	Accp-Use Policy Signed Date	<input type="checkbox"/>
Accp-Use Quiz Passed	Accp-Use Quiz Passed	<input type="checkbox"/>
Accp-Use ReActivation Date	Accp-Use ReActivation Date	<input type="checkbox"/>

2. Check the boxes in the Select column to indicate the fields you want to have available for use on online registration custom forms. For more information on this topic see *Online Registration Setup* on the Tyler SIS support site.

## Links tab

1. If you are not already in edit mode, click **Edit**

Description	Web Address	From Grade	To Grade	360 Tile
Assessments	http://www.tylertech.com/			
Online School Store	http://integrationtrain2.netrav.net			
Learning Management	http://www.tylertech.com/			
K-5 Kids	http://www.k-5-kids.com/			
Stara	http://www.scholastic.com/stara/school/			
Spelling City	http://www.spellingcity.com/			
Study Island	http://www.studyisland.com/			

2. Select Parents or Students from the drop menu. Enter a description and web address in the appropriate columns. Leave the From and To Grades blank for the entry to apply to all grade levels. If a grade range is entered for parents, then it is displayed if any student matches that grade range in the family.
3. Links have the ability to show up as a Tile in 360 for Parents and Students. You can edit the link and set it up with a specific color and graphic for the 360 Tile.

Link for Parents

Description:

Web Address:

Grade From:  To:

Display as Tile on the 360 Student Summary page

Tile Color:

Graphic:

4. Click **Apply** to save and continue or **Done** to save and exit.



## Student Login tab

1. If you are not already in edit mode, click **Edit**.

2. Check the **Allow Student Login** box to allow students access to the student portal. This creates a Students tab on the **User Login** screen. You may also create a link on your district website directly to the student link by using your regular URL/student. This option does not affect parent's ability to log into the portal.

The **In the Default Portal Year (xxxx) or any Future Year students must** option is checked to limit students' and parents' ability to login to the portal. If selected, parents must have at least one student that meets the criteria of the next selected option in order to log into the portal. The student must meet the next criteria selected in order to log into the portal.

**NOTE:** The login options chosen here impact a parent's ability to login to re-enroll withdrawn students. If a family from a previous school year returns, the parent may not be able to login unless the returning student(s) are marked as New.

3. When the **In default Portal Year** option is checked, the **Be active** option requires that at least one student in the family be enrolled in a school in the year noted or future for the students and parents to log into the portal.



4. When the **In default Portal Year** option is checked, the **Have any active or withdrawn enrollment** option requires that at least one student in the family have an active or withdrawn enrollment record in the year noted or future for the students and parents to log into the portal.
5. Check **Students can change their own password and use the Forgot Password link on 360** to allow students to manage their own passwords. This setting is ignored if alternate authentication is configured on **District Settings > Integration Services** tab.
6. Select the appropriate student **Login ID** option. To import a custom external ID and password, go to **Management > Import and Export > Import Student Login ID and Password for Portal**.
  - The import file must be tab delimited text with columns for **ID**, **Portal ID**, and **Password**.
  - Without importing a password, the default password is student's birth date, formatted as mmddyy.
7. Check the **Set all passwords to Birth date** box to reset the default password for every student.
8. Check the **Force change password after next login** box to force students to set their own passwords. Students cannot choose to change their own password any other time.
9. Click **Apply** to save and continue or **Done** to save and exit.

## Viewing the Portal for a Student

Many users wish to view the Parent/Student Portal, to review information to be posted.

From the student's **Contact Summary Information** screen, click **Actions > View Portal for Student**. The student's portal opens in a new window. Only the sdmadmin user sees all data areas parents see. All other users see only the **Home**, **Attendance**, and **Grades** tabs.

Another option is to view the portal from the parent's point of view. From the **Family Registration > Household Parents tab**, use the **Impersonate** button. The portal opens with this parent's settings displayed.

The screenshot shows the 'FAMILY REGISTRATION' interface for the 'Family of Dr and Mrs Joe Barker' at '236 W BROADWAY Boulevard #3B, Ed'. The 'Household Parents' tab is active. The 'Parent 1' section includes a red-bordered 'Impersonate' button. Other fields include 'Proper Mailing Name', 'Language Spoken at Home' (Spanish), 'Prefix' (Mr), 'First Name' (Joe), 'Middle Name' (Robert), 'Last Name' (Barker), 'Suffix', 'Head of Household' (checked), 'State ID', 'Home Tel-1' ((555) 314-2828), 'Home Tel-2' ((555) -), 'Cell Phone' ((555) 314-6541), and 'Pager'.

© 2020 Tyler Technologies, Inc. All rights reserved