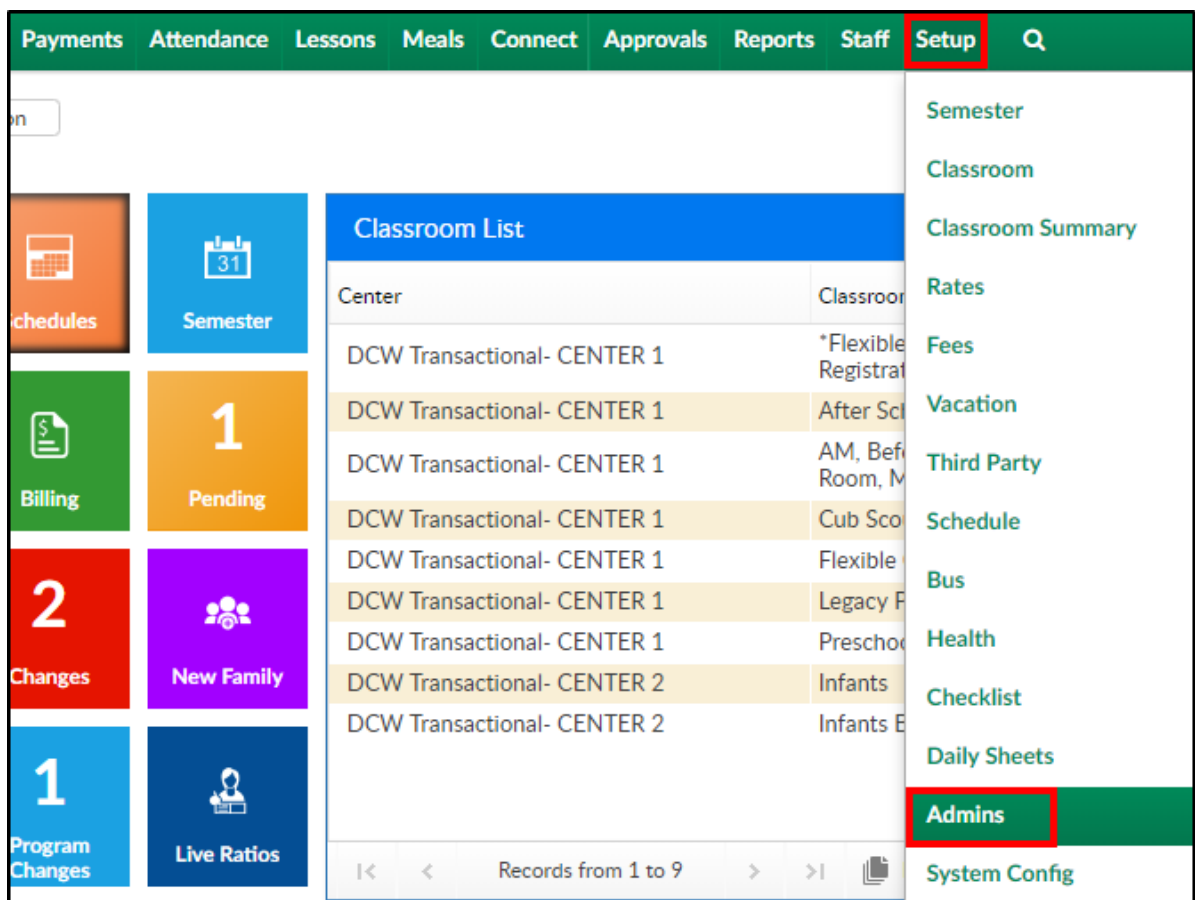


How to setup the Parent Portal Role

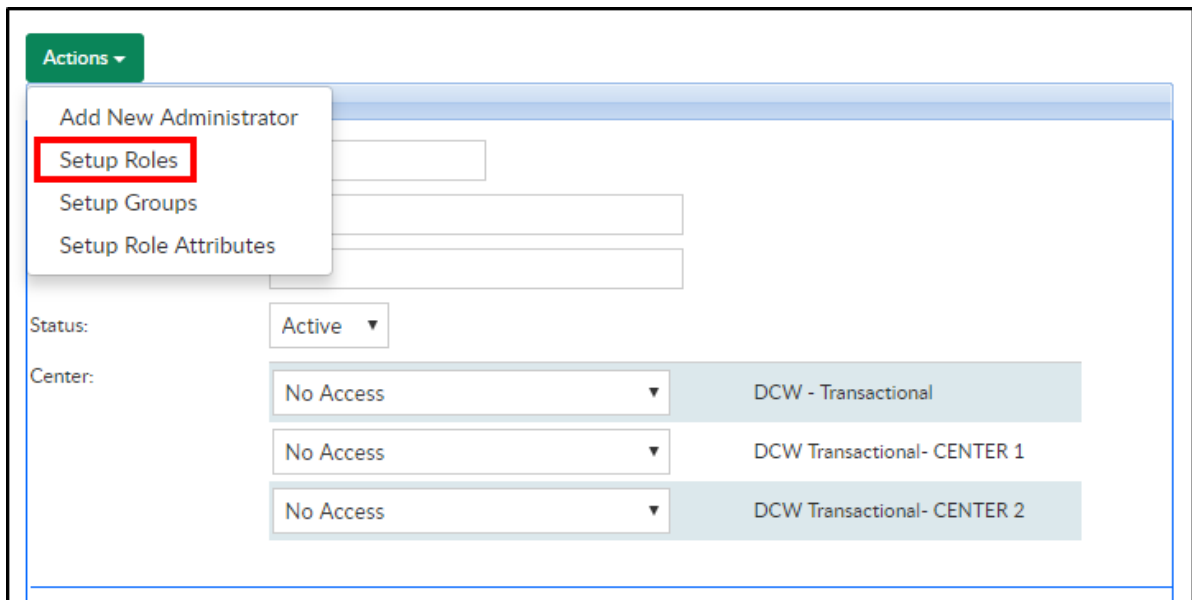
Last Modified on 02/15/2019 11:50 am EST

Setting up parent roles allows administrators the ability to determine what tabs on the main toolbar parents will be able to view in the Connect Portal.

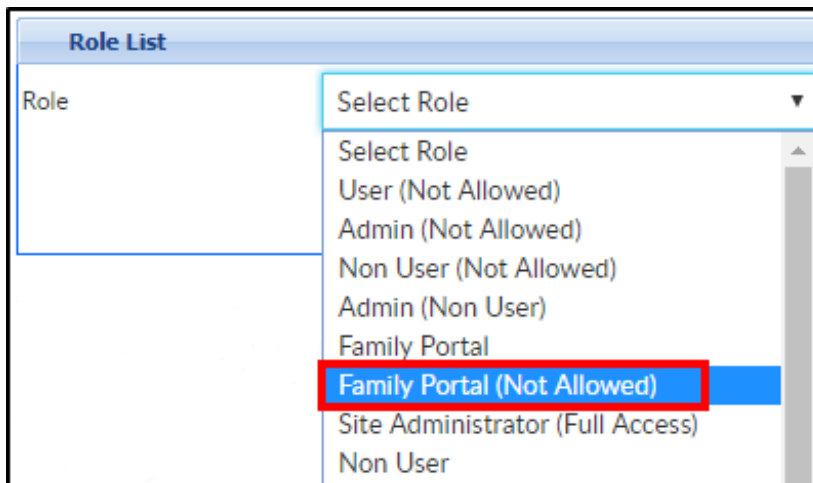
1. From the Setup menu, click Admins



2. Click Actions, then select Setup Roles



3. From the Role drop-down, select Family Portal (Not Allowed). Please Note: "Not Allowed" implies this role is for parents only, not for administrators



4. Select the permission for each Activity ID
 - No Permission - this activity/field is hidden from parents
 - All Permissions - parents have the ability to view and edit this activity/field
 - Read Only - parents can only view this activity/field, but unable to make changes

Connect Portal Activity IDs

Below is a list of all Activity IDs associated with the Connect (Parent) Portal

Activity ID	Title	Description	Navigation
845	Attendance Menu	Allows the Attendance tab to display. This tab displays a student's schedule, attendance, and where parents pick days for parent managed classrooms	Home screen
846	Personal	Allows the Personal tab to display. This tab displays the student, guardian(s), and emergency contact information	Home screen
847	Registration	Allows the Registration tab to display. This is where parents register for programs and events via the Connect Portal	Home screen
848	Camps	Allows the Camps tab to display. This is where parents register for camps via the Connect Portal	Home-screen
849	Calendar	Allows the Calendar tab to display. This tab allows parents to view online calendars and events setup by administrators	Home screen
850	Communication	Allows the Communication tab to display. This tab displays documents, links,	Home screen

and staff profiles

851 Auto-Pay

Allows the Auto-Pay tab to display. This allows parents to register for auto-pay and view auto-payment methods and details

Home screen

886 Payment Notes

Determines if parents are able to leave notes for one time payments - these notes will not display on the admin side

Make Payment > Pay Now

909

Registration Search

Determines if parents are able to search for programs during registration. Selecting No Permission will hide the search feature for registration. Parents will be required to pick the program by selecting a category then program

Registration

925

Attended Previous Summer Program

Displays the field - Attend Previous Summer Program

Personal > Update Information

926

Attended Previous After School Program

Displays the field - Attend Previous After School Program

Personal > Update Information

927

Is child allergic to food or other substances

Displays the field - Is child allergic to food or other substances and provides a free text field

Personal > Update Information

Displays the field - Is child

928	Is child usually susceptible to infections	usually susceptible to infections and if so, what precautions need to be taken and provides free text field Displays the field - Is child	Personal > Update Information
929	Is child subject to convulsions	subject to convulsions and what should be our procedure if one occurs and provides free text field	Personal > Update Information
930	Is there any physical condition	Displays the field - Is there any condition that we should be aware of and what precautions should be taken (heart trouble, foot problem, hearing impairment, hernia, etc.) and provides free text field	Personal > Update Information
931	Accommodations	Displays the free text field - Accommodations	Personal > Update Information
932	Consent for the child photograph	Displays the field - Do you provide consent for the child photograph to be released	Personal > Update Information
933	Booster Seat	Displays the field - State statues require any child under the age of 8 years old and under 80 lbs. be transported in a booster seat while in any vehicle with seat belts. My child weighs less than 80 lbs.	Personal > Update Information
		Displays the field - Insect	

934	Insect Repellent	Repellent: Center will provide Cutter All Family Pump Spray, 7% Deet. I authorize Center to apply insect repellent to my child	Personal > Update Information
935	Sunscreen	Displays the field - Sunscreen: I authorize my child to self-apply sunscreen to the extent possible, and for Center staff to provide assistance to my child in applying sunscreen as necessary to ensure adequate coverage	Personal > Update Information
936	Swim Level	Displays the field - Child swim level with a drop-down	Personal > Update Information
937	Swim Concerns	Displays the field - Any swim concerns and a free text field	Personal > Update Information
938	Pickup Notes	Displays the field - Pickup Notes and a free text field	Personal > Update Information
939	Extra T-Shirt	Displays the field - Request Extra T-Shirt	Personal > Update Information
940	Food/Milk Allergy	Displays the field - Is child allergic to Food/Milk and a free text field	Personal > Update Information
941	Special Food Needs	Displays the field - Have special food needs and a free text field	Personal > Update Information
942	Medical Allergy	Displays the field - Is child allergic to any Medications	Personal > Update Information

943	Environmental Allergy	Displays the field - Does child have any Environmental allergies	Personal > Update Information
944	Other Allergy	Displays the field - Does child have any Other allergies	Personal > Update Information
945	EPI Pen	Displays the field - Child will have an epi-pen at site	Personal > Update Information
946	Asthma	Displays the field - Does you child have asthma and use an inhaler and provides a free text field	Personal > Update Information
947	Motor Disorder	Displays the field - Does child have cerebral palsy/motor disorder. See Activity ID 977 to display a free text field	Personal > Update Information
948	Diabetes	Displays the field - Does child have Diabetes and provides a free text field	Personal > Update Information
949	Seizures	Displays the field - Does child have Epilepsy/Seizures - See Activity ID 976 to display the Date field	Personal > Update Information
950	Chickenpox	Displays the field - Has child had chickenpox and provides a Date field	Personal > Update Information
951	Glasses	Displays the field - Does child wear Glasses or Contacts	Personal > Update Information
952	ADD/ADHD	Displays the field - Does child have ADD/ADHD and provides a free text field	Personal > Update Information
		Displays the field - Does child	

953	Autism	have Autism Spectrum and provides a free text field	Personal > Update Information
954	Behavioral Issues	Displays the field - Does child have any Behavioral Issues and provides a free text field	Personal > Update Information
955	Other Special Care	Displays the field - Does child have any other conditions that may require special care and provides a free text field	Personal > Update Information
956	Additional Support Services	Displays the field - Does child receive additional support services or one-on-one support during the school year and provides a free text field	Personal > Update Information
957	One-on-one support	Displays the field - Does your child receive additional support services or one-on-one support during the school year and provides a free text field	Personal > Update Information
958	Medications	Displays the field - Medications (prescribed and over-the-counter) your child takes regularly between program times. Please list the name of medication and the time of day to be administered	Personal > Update Information
		Displays a free text field - I	

959	Participation Restrictions	feel my child can participate in program activities without restrictions (if no, my child can participate with the following restrictions or accommodations). (See Activity ID 979 for Yes/No response)	Personal > Update Information
960	Triggers	Displays the field - Specify triggers that may cause problems and steps staff should follow	Personal > Update Information
961	When to call parents	Displays the field - When to call parents regarding symptoms or failure to respond to prescribed treatment	Personal > Update Information
962	Special Training	Displays the field - Identify any program staff to whom you have given specialized training/instructions to help treat symptoms	Personal > Update Information
976	Seizure Date	Displays a Date field next to the question: Does child have Epilepsy/Seizures	Personal > Update Information
977	Motor Disorder Information	Displays the free text box next to Does child have cerebral palsy/motor disorder (Activity ID 947)	Personal > Update Information
	Cognitive	Displays the field - Have	Personal > Update

978 Information Detail cognitive/learning disabilities and a free text field Information

979 Participation Restrictions Indicator Displays Yes/No/Not Answered indicator for I feel my child can participate in program activities without restrictions (if no, my child can participate with the following restrictions or accommodations). Activity ID 959 must be turned on for this field to display Personal > Update Information

980 Medications Indicator

981 Other Medication Indicator Displays the field - My child will have other medications at site and provide a free text field Personal > Update Information

982 Other Medication Detail

983 Reassessment Information Displays the field - When to consider that the condition requires emergency medical care or reassessment Personal > Update Information

987 Summer School Displays 3 questions - My child will go directly to his/her summer school program from home, My child will depart their summer program to attend their summer school Personal > Update

program, and My child will arrive at their summer program from their summer school program. Each question has a Yes, No, N/A indicator and a Time field

Information

988	Student Email	Displays the field - Email	Personal > Update Information
989	Student ID	Displays the field - Student ID	Personal > Update Information
990	Custody Papers	Displays the field - Custody papers have been provided	Personal > Update Information
991	Insurance	Displays the fields - Insurance Covered (Yes, No, N/A), Insurance Company field, and Health Policy Number field	Personal > Update Information
992	Hospital	Displays the fields - Hospital Preferred, Hospital Address, and Hospital Phone	Personal > Update Information
993	In an Emergency Call First	Displays the field - In an Emergency Call First	Personal > Update Information
994	First Release	Displays the field - First Release with a drop-down menu including guardians and contacts	Personal > Update Information
995	May not remove my child	Displays the field - The following person(s) may not remove my child from the facility and provides 2 text	Personal > Update Information

		boxes	
996	Date of Last Tetanus	Displays the field - Date of Last Tetanus	Personal > Update Information
997	Additional Comments	Displays the free text field - Additional Comments	Personal > Update Information
998	Special Instructions	Displays the free text field - Special Instructions	Personal > Update Information
999	Percentage Paid	Displays the field - Percentage Pay	Personal > Parents/Guardians > Update Information
1000	Sponsor Indicator	Displays the field - Sponsor (Yes/No)	Personal > Parents/Guardians > Update Information
1001	Employee Indicator	Displays the field - Employee (Yes/No) and a free text field	Personal > Parents/Guardians > Update Information
1002	Employer/School Information	Displays 7 fields - Employer/School Name, Location, Address, City, State, Zip, Phone	Personal > Parents/Guardians > Update Information
1003	Release Limitations/Notes	Displays the field - Release limitations/notes	Personal > Contacts (Add new or Update Information)
1004	Contact Type	Displays the drop-down - Contact Type (Emergency Release, Doctor, Do Not Release, etc.)	Personal > Contacts (Add new or Update Information)
1128	Allow Recurring Setup	Displays the drop-down - Recurring and First Payment Date field	Auto-Pay > Add New Payment Method
		Allows parents to click View	

1149	View Statement Details	Details under each Fee line item	Statements > View Details
1151	Custom Auto Pay Message Agreement Checkbox	Adds a checkbox above the Save button to agree to the charges	Auto-Pay > Add New Payment Method
1163	Summary Year End	Allows parents to pull a PDF version of the year end tax statement	Statements > Summary Year End
1164	Scholarship		
1180	Show Credit Card as Autopay Payment	Allows parents to setup a credit card for auto-payments. If no permissions is selected, only ACH can be setup	Auto-Pay > Add New Payment Method or Change (on existing) > "Payment Type"
1181	Recurring Option - Full Amount	Allows parents to select full amount as an option to have recurring payments made	Auto-Pay > Add New Payment Method or Change (on existing) > Recurring
1182	Recurring Option - Weekly	Allows parents to select weekly as an option to have recurring payments made	Auto-Pay > Add New Payment Method or Change (on existing) > Recurring
1183	Recurring Option - Bi Weekly	Allows parents to select bi weekly as an option to have recurring payments made	Auto-Pay > Add New Payment Method or Change (on existing) > Recurring
1184	Recurring Option - Monthly	Allows parents to select monthly as an option to have	Auto-Pay > Add New Payment Method or Change (on existing) >

		recurring payments made	Recurring
1195	Resides With	Displays the field - Resides With	Personal > Update Information
1196	Telephone Authorization Code	Displays the field - Telephone Authorization Code	Personal > Update Information
1197	Doctor Name	Displays the field - Doctor Name	Personal > Update Information
1198	Doctor Address	Displays the field - Doctor Address	Personal > Update Information
1199	Doctor Phone	Displays the field - Doctor Phone	Personal > Update Information
1200	Asthma/Inhaler	Displays Field - If child has asthma, will the child have inhaler on site	Personal > Update Information
1201	Upload Picture	Displays the field - Picture: click to upload a picture	Personal > Update Information
1202	Information Record	Allows parents to view the student's information record in PDF format	Personal > Information Record
1203	Vacations	Allows parents to request vacation days	Personal > Update Information > Vacations
1204	Display Daily Log	Allows parents to view the Daily Log	Personal > Update Information > Log
1228	Print Student Class Schedule	Allows parents to print a student's schedule	Schedule > Print Student Class Schedule
1231	Custom One Time Payment Message Agreement Checkbox	Places a checkbox above the Submit Payment button. The wording can be updated.....	Make Payment > Pay Now

1235	Export Calendar	Allows parents to export the student's monthly schedule into a PDF calendar format	Schedule > Export Calendar
1236	School Attending	Displays the field - School Attending with a drop-down including all the centers at the location	Personal > Update Information
1237	Export Statement to Excel	Allows parents to pull a statement for selected dates in Excel format	Statements > Statement > Export to Excel
1238	View Statement link (PDF Statement report)	Allows parents to view the current statement in PDF format	Statements > View Statement
1241	Allow Auto-Pay Replace From One Time Payment Page	Adds "Replace Auto-Pay Account" drop-down	Make Payment > Pay Now
1242	Allow parent to deactivate/active Auto-Pay account	Allows parents to mark a payment method as active or inactive	Auto-Pay > Deactivate/Activate
1243	Allow parent to edit Auto-Pay account	Allows parents to edit the auto-pay account on file	Auto-Pay > Change
1244	Allow parent to delete Auto-Pay account	Allows parents to remove the auto-pay account on file	Auto-Pay > Remove
1251	Dentist Name	Display the field - Dentist Name	Personal > Update Information
1252	Dentist Practice	Display the field - Dentist Practice	Personal > Update Information

1253	Dentist Address	Display the field - Dentist Address	Personal > Update Information
1254	Dentist Phone	Display the field - Dentist Phone	Personal > Update Information
1255	Guardian E-Signature	After submitting registration, a signature option comes up	Registration > Submit Registration
1256	Add Linked Accounts	Allows parents to link accounts across multiple centers	Account > Linked Accounts
1257	Active Status	Allows parents to make a contact as Active/Inactive	Personal > Contacts (Add new or Update Information)
1258	Appearance Attributes	Displays 4 fields - Height, Weight, Hair Color, and Eye Color	Personal > Update Information
1259	Add New Student	Allows parents to add a new student to the family	Personal > Add New Student
1260	Display Absent/Vacation	Allows parents to view attendance list and vacation/absent list by student in a table format	Schedule > View Attendance
1261	Health Table Label	Displays the section title "Health" on the student's Information Summary	Personal > Update Information
1262	Picture	Displays the field - Picture: Choose File	Personal > Parents/Guardians > Update Information
1263	Save pymt details as registered pymt method Tempus	Displays a checkmark next to Save payment method to my account	Make Payment > Pay Now
		Card Connect clients only -	

1264	Show Manage Pymt Methods Link (Tempus)	allow parents to adjust payment methods when multiple cards are on file	Make Payment > Pay Now
1268	Display Uneditable Reconfirmation Text		
1271	Display Security Questions	Allows parents to setup security questions, which can be used if they need to reset their password on their own using the Password Reminder link on the login screen	Account > Security Questions
1278	Statement Tile (Metro View)	Allows the Statements tile to appear on the home screen. This screen is where parents can view statement details, year end summary, etc.	Home screen
1282	Grade	Displays the drop-down field Grade	Personal > Update Information
1283	Register New Student	Allows parents to register a new student	Personal > Student drop- down > Add New Student
1284	Does your child have an IEP	Displays the field - Does your child have an IEP	Personal > Update Information
1285	Upload IEP Document	Allows parents to upload an IEP	Personal > Update Information
1287	In District	Adds an "In District" indicator	Personal > Update Information
		Displays the field - Primary	Personal > Update

1288	Primary Language	Language	Information
1289	Secondary Language	Displays the field - Secondary Language	Personal > Update Information
1290	Interpreter Needed	Displays the field - Interpreter Needed (Yes, No, N/A)	Personal > Update Information
1291	Interpreter Language	Displays the field - Interpreter Language	Personal > Update Information
1292	Attended Previous Preschool, Pre-K, or K program	Displays 2 fields - Attended Previous Preschool, Pre-K, or Kindergarten Program and If yes, where	Personal > Update Information
1295	E-Signature	Displays the field - Electronic Signature on the guardian profile	Personal > Parents/Guardians > Update Information
1296	View Daily Sheets		
1312	Pre-screening for early entrance GPS	Displays the field - "Has your child been pre-screened for early entrance into kindergarten at any GPS location this school year?"	Personal > Update Information
1313	School Attending for Kindergarten	Displays the field - School your child will be attending Kindergarten	Personal > Update Information
1327	Display program child is attending		
1328	Display semester child is enrolled in		
1330	Room Change Request (Calendar	Adds the Calendar tab on the Schedule screen	Schedule > Calendar

	Tab)		
1350	Immunization Dates Link	Allows parents to add/edit immunization dates	Personal > Update Information > Immunization Dates
1367	Daily InSite Tile	Allows parents to view the Daily InSites tab	Home screen
1395	Set Guardian 2 to N/A	Add a button to set guardian 2 as N/A instead of requiring information be added	Personal > Parents/Guardians > "Set Guardian 2 to N/A"
1431	Preferred Statement Method	Displays the field - Preferred Statement Method with a drop-down on the guardian profile	Personal > Parents/Guardians > Update Information
1521	Home Room Teacher	Displays the field - Home Room Teacher with a drop-down to select the staff member	Personal > Update Information
1522	Immunization Waiver For Religious Reason	Displays the field - For religious reasons this child should not be immunized	Personal > Update Information
1523	Immunization Waiver For Personal Conviction	Displays the field - For personal conviction reasons this child should not be immunized	Personal > Update Information
1527	Profile Section	Allows parents to view staff profiles	Communication > Profile
1545	Show Prepaid Deposits	Allows parents to view prepaid deposits	Statements > Show Prepaid Deposits (top right)
		Add or remove the text next to the Recurring Amount	Auto-Pay > Add New

1550	Recurring Amt Text Leave blank to pay full balance	field "Leave blank to pay full balance" on Payment Method setup	Payment Method or Change (on existing) > Recurring
1551	Auto Pay Do Not Exceed Balance	Turns on "Do not exceed balance" Yes/No field on Auto-Pay screen	Auto-Pay > Add New Payment Method
1560	Room Change Request Edit/Delete Button change	Adds the option for parents to request a schedule	Schedule > Edit icon to the left of program details
1593	Sleep Position	Allows parents to select the sleep position of the student	
1596	Birthday	Allows the guardian birthday to display	Personal > Parents/Guardians > Update Information
1614	Recurring Option - Bi Monthly	Allows parents to select bi monthly as an option to have recurring payments made	Auto-Pay > Add New Payment Method or Change (on existing) > Recurring
1616	Store	Allows parents to view the Store tab	Home screen
1617	Volunteer	Allows parents to view the Volunteer tab	Home screen
1659	Edit Immunuzation Link	Adds an Edit Immunization link on the Cart screen during registration. This allows parents to enter immunization dates	Registration > Enroll > Edit Immunization
1669	Other	Displays the free text field - Other	Personal > Update Information
			Personal >

1670	Best Phone	Displays the field - Best Phone for parent/guardian	Parents/Guardians > Update Information
1671	Best Location	Displays the field - Best Location for parent/guardian	Personal > Parents/Guardians > Update Information
1672	Hours of Employment	Displays the field - Hours of Employment for parent/guardian	Personal > Parents/Guardians > Update Information
1673	Cell Phone	Displays the field - Cell phone for Contacts	Personal > Contacts (Add new or Update Information)
1674	Employer/School ID	Displays the field - Employer/School ID for parent/guardian	Personal > Parents/Guardians > Update Information
1713	Change User ID	This option allows parents to change their user name	Account > Change ID
1743	Address 2 field	Displays the field - Address 2 for parent/guardian	Personal > Parents/Guardians > Update Information
1744	Address 2 field	Displays the field - Address 2 for student information	Personal > Update Information
1745	Relationship Status	Displays the field - Relationship Status with a drop-down	Personal > Parents/Guardians > Update Information
1760	Race	Displays the field - Race with a drop-down	Personal > Update Information
1761	Ethnicity	Displays the field - Ethnicity with a drop-down	Personal > Update Information
1762	Communicable Diseases	Displays the field - Has Communicable Diseases	Personal > Update Information

1763	Immunizations Up To Date	Displays the field - Are Immunizations up to date	Personal > Update Information
1767	Annual Income	Displays the field - Annual Income on the guardian profile	Personal > Parents/Guardians > Update Information
1768	Household Size	Displays the field - Household Size on the guardian profile	Personal > Parents/Guardians > Update Information
1794	Marital Status	Displays the field - Marital Status with a drop-down on the guardian profile	Personal > Parents/Guardians > Update Information
1795	Ethnicity	Displays the field - Ethnicity with a drop-down on the guardian profile	Personal > Parents/Guardians > Update Information
1796	Race	Displays the field - Race with a drop-down on the guardian profile	Personal > Parents/Guardians > Update Information
1809	Select/De-Select All Parent Managed Days	Select/Deselect all available parent managed days for the student and month displayed for a particular registration room	Schedule/Attendance icon
1815	Family (combined) Income Level	Displays the field - Family (combined) income Level with a drop-down	Personal > Parents/Guardians > Update Information
1821	Child Document Link	Allows parents to upload documents to the student's record	Personal > Child Documents