

Parent Portal

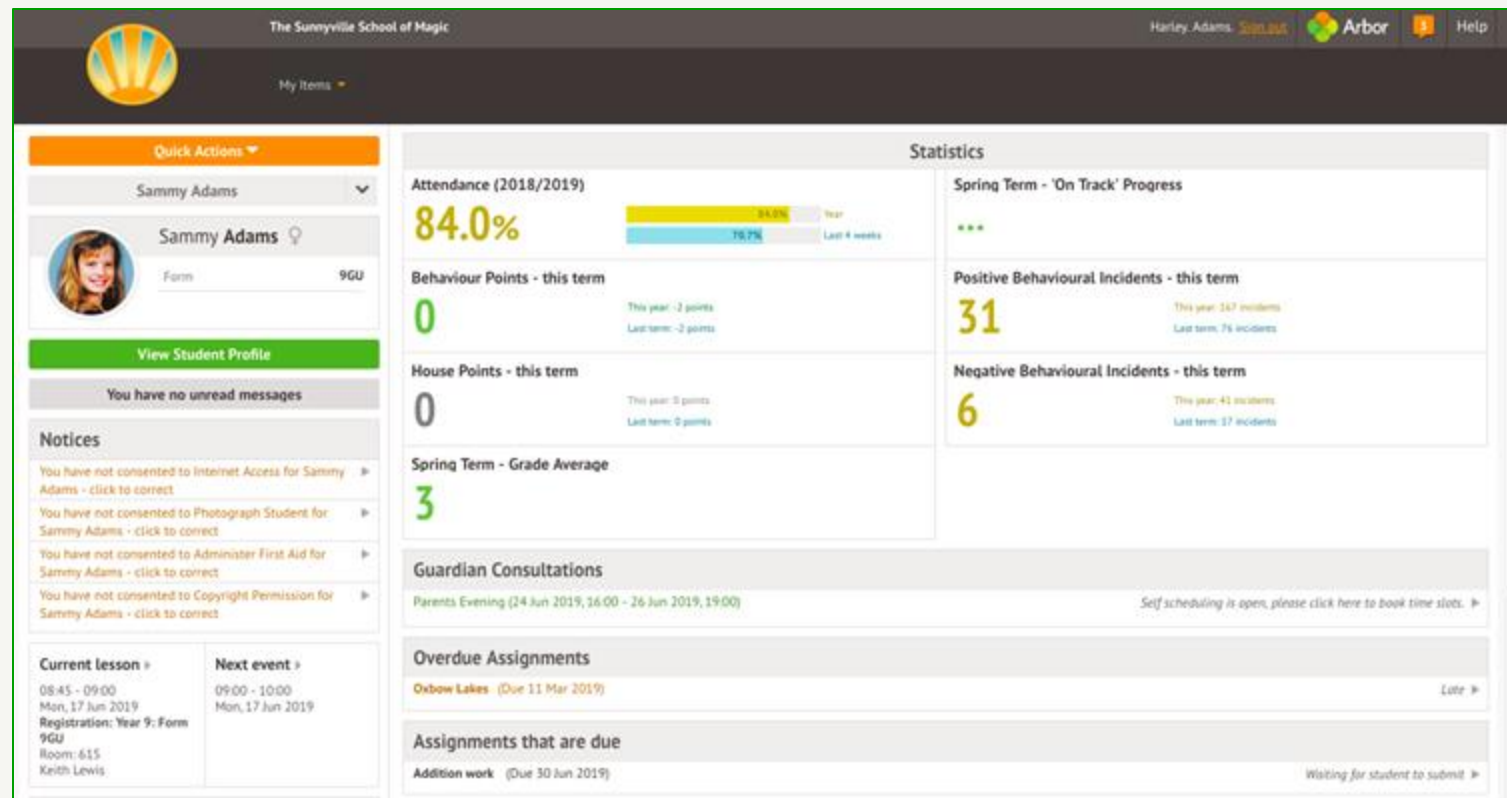
Agenda for the Session

1. Overview
2. Setup
3. Enabling parent access
4. Providing access
5. In App Message Setting and Sending In App Messages
6. Consents
7. Changes

Overview

Your child's dashboard

On a desktop computer, the **dashboard** is the first screen that the Parents will see. This gives a quick glance of the student's daily timetable, behaviour points, meals, notices, current attendance and progress.

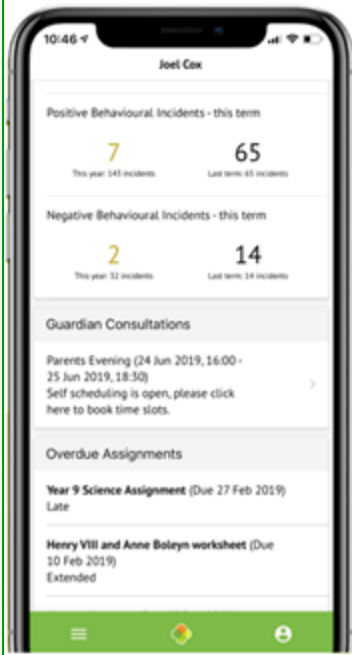


The Arbor App

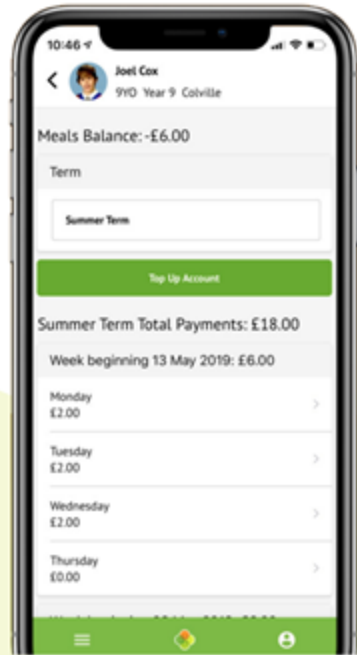


The Arbor App

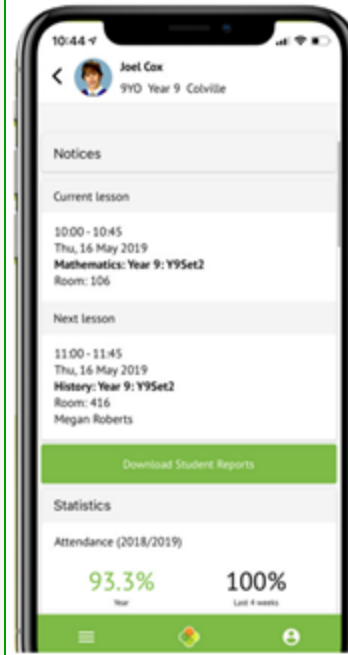
Get live updates
from the school



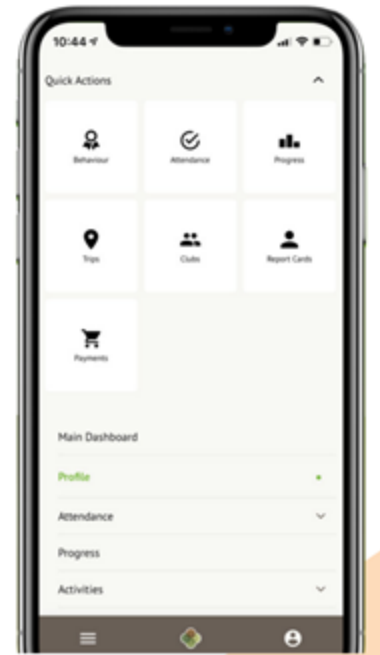
Make payments
on the go



Check on your child
from anywhere



Access all of your
info in one place



Setup

Check your Student and Guardian details

- Ensure all Student and guardian profiles exist.
 - Make sure that all students you want guardians to be able to view on their Parent Portal have been added to your Arbor site.
- Resolve duplicate profiles
 - If you have a guardian with more than one profile, the Parent Portal will not know which profile to show when logging in and will show an error.
- Check email addresses
 - Check all Primary Guardians have an email address on their profile. This information can be found and any gaps filled in by going to [Students > Parents & Guardians > Bulk Update > Guardian Contact Details](#).
 - This is particularly important, as the email address functions as the username guardians use to log into the Parent Portal.

Decide on your Parent Portal settings

- Consents

- We have lots of out-of-the-box consents that you can choose to request from guardians through the parent portal. To set which consents should be collected through the parent portal, or to add new consents, [click here](#).

- Payment Settings

- You'll want to make sure parents are able to pay for all the different accounts you need.
- Take a look at our [Payments Guide](#) for how to set up payments in Arbor.

- Parent Portal Settings

- Decide what you want to show on the Parent Portal. Work through each section in [this article](#) choosing your settings. These settings are very important to get right, as they determine everything guardians can see.

Enabling parent access

Enabling Control

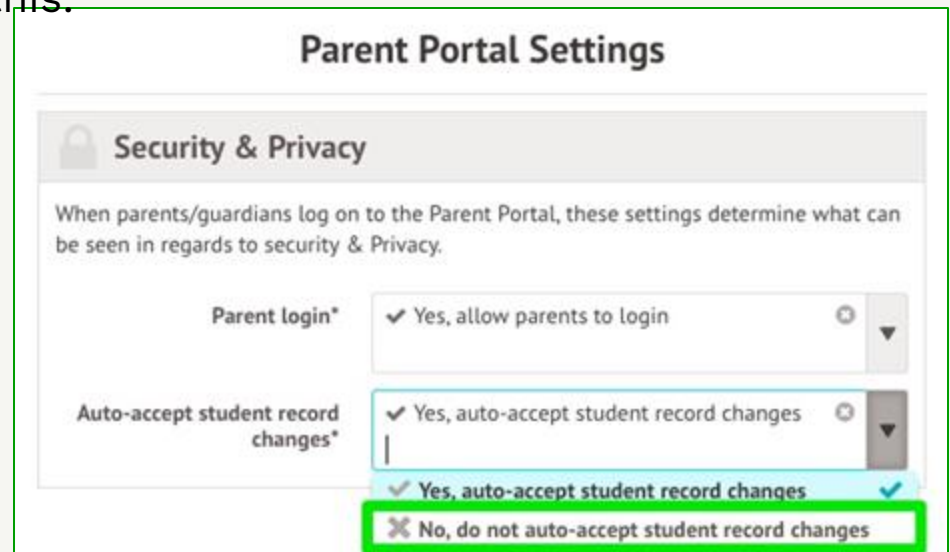
You need to enable the feature - this is done by going to [Students > Parents and guardians > Parent Portal settings](#)

The below setting needs to be changed to NO to ensure you have control over your school's data:



Security & Privacy	
Parent login	✓ Yes, allow parents to login
Auto-accept student record changes	✓ Yes, auto-accept student record changes

To change this setting, click on the small arrow at the end of the row of text to see a slide-over where you can change this:



Parent Portal Settings

Security & Privacy

When parents/guardians log on to the Parent Portal, these settings determine what can be seen in regards to security & Privacy.

Parent login*

✓ Yes, allow parents to login

ⓘ ▼

Auto-accept student record changes*

✓ Yes, auto-accept student record changes

ⓘ ▼

✓ Yes, auto-accept student record changes

✓ No, do not auto-accept student record changes

Providing access

School Information

Students > Parents & Guardians > Parent Portal > Parent Portal Usage

Parent Portal Usage

Parent Portal Usage

Students whose parents have logged on at least once

0%

Logins Per Week

Year to date (2018/2019)

0

Current Students

Future Students

Showing 399 results

Download

☐ 	Student	Year Group	Reg. Form	Guardians	Last Login	Last Login By
☒	Resend guardian login details	Year 5	Form 5ZE	Barry Adams and Amanda Adams		
☐	Email Guardians	Year 4	Form 4CW	Callum Adams, Rebecca Adams, Amanda Adams and Ba...		
☐	Adams Nicole	Year 6	Form 6LJ	Graham Adams		
☐	Adams Tom	Year 2	Form 2HE	Brandon Adams and Phoebe Adams		
☐	Allen Alexander	Year 6	Form 6QT	Andy Allen and Lexi Allen		
☐	Allen Freddie	Year 3	Form 3ZD	Finley Allen and Tracy Allen		

When the parent portal is enabled, to send out all logins please navigate to the page above.

Here, you can select all guardians, click the pencil at the top of the column and 'resend guardian login details'. This will send all those in the list an email with the link to sign in.

In App Messages Settings

In App Message Settings

Navigate to:

[School](#) > [Communications](#) > [Setup](#) > [In App Settings](#)

When Guardians download the App they will be asked if they want to enable push notifications. For those Guardians who chose not to enable push notifications or do not download the app, the system can send an email instead to advise them of your in app message. You can even set the system to send a text message in the in app message is not read.

Sending In-App Messages

Guardian's notification Notifications are set up, click for details

Notify recipient by... ☒ Email

☒ Push notification on mobile app

Send SMS message to recipient if they didn't read in-app message within...

Do not send SMS message

You have the option of whether or not Guardians can reply to text messages and who to notify if they do; [Communications](#)>[Set Up](#)>[In AppSettings](#)>[Receiving In App Messages](#)

Receiving In-App Messages

Accept messages from guardians Yes

New in-app message notification Notifications are set up, click for details

Sending In App Messages

Sending in-app messages

Navigate to:

School > Communications>In-App Messages>New Mail Merge In-App Message

New Mail Merge In-App Message

Please make sure you're only working on one mail merge in-app message at once

Currently, Arbor can only support a Mail Merge In-App Message being created within a single browser tab. Working on multiple Mail Merge In-App Messages across multiple tabs can disrupt the sending of your messages.

Thank you for working on only one message at a time!

What kind of messages should be send via in-app messaging channel?

Remember that some guardians might not have a mobile app installed or do not log in to Parent Portal regularly - they will not be able to read your message immediately or read it at all. Thus we recommend not sending critical or very time-sensitive messages via this channel. Please also visit [this page](#) to set up guardians' notifications for in-app messages sent to them.

From*

Sunnyville All Through School

To

Combine messages?

One message per household, for each student

A

T

E

E

Merge Fields

 Arbor

Consents

Adding Consents

Go to **Students > Parents and Guardians > Parental consents.**

Here you will see a list of out-of-the-box consents Arbor have provided for you.

Parental Consents		Add New Consent Type
Consent Types		
Administer First Aid	Manually requested from guardians ▶	
Contact Dentist	Manually requested from guardians ▶	
Contact Doctor	Manually requested from guardians ▶	
Copyright Permission	Manually requested from guardians ▶	
Data Exchange	Manually requested from guardians ▶	
Internet Access	Auto-requested from guardians ▶	
Medical Form	Manually requested from guardians ▶	
Photograph Student	Auto-requested from guardians ▶	
School Visit Permission	Manually requested from guardians ▶	
Sex Education	Manually requested from guardians ▶	
Specific photo consent	Auto-requested from guardians ▶	

To add a consent, click **Add New Consent Type** on the right-hand side of the page.

Add Consent Type

Consent type*

Description

Automatically request from guardians? ☐

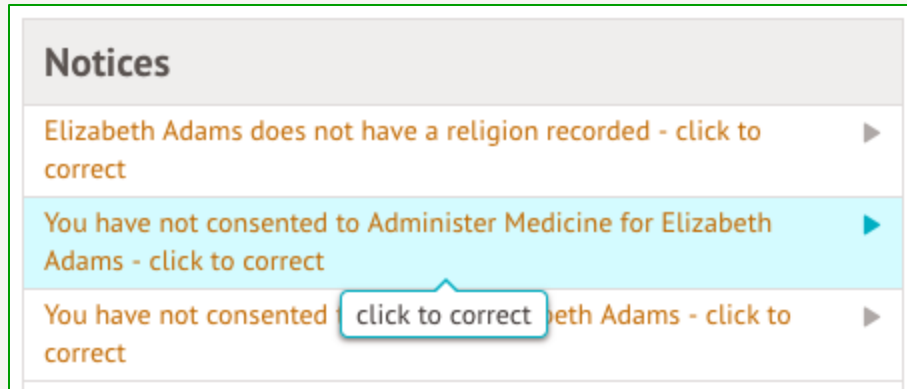
[Cancel](#) [Add Consent Type](#)

Consent Type - This is the Parent Consent Form Title.

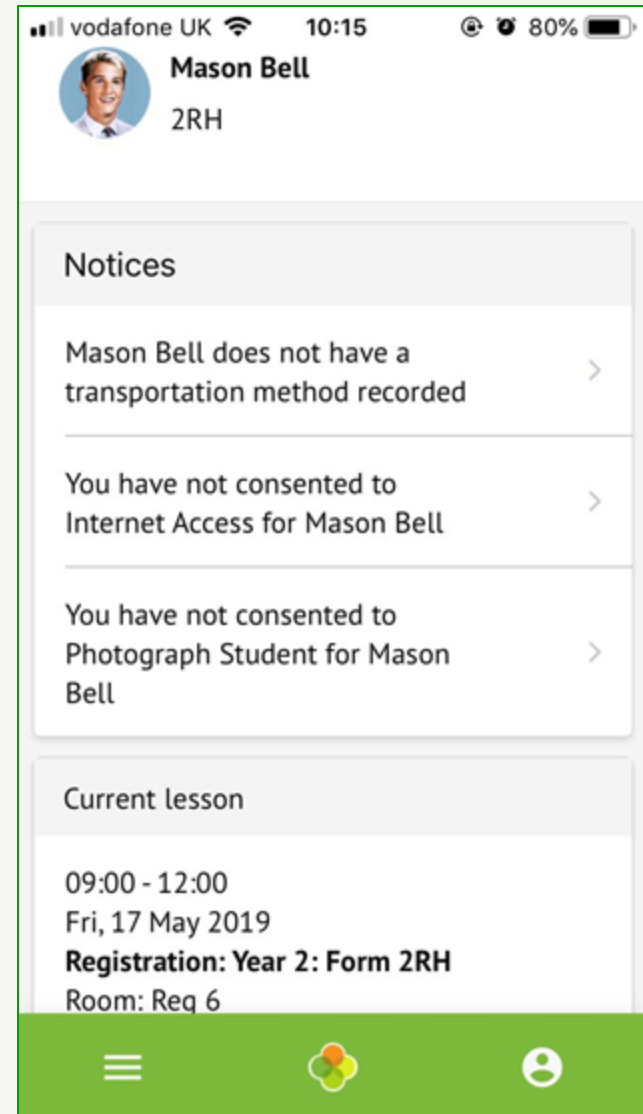
Description - This wording is shared with the parent/guardian when they received the consent form.

Automatically Request from Guardian? - If the user leaves this option unticked, they will have to manually select which parent will receive the consent form.

Consents on the Arbor App



Selecting 'Automatically Request from Guardian?' will automatically make the consent visible to every guardian to approve on the **Parent Portal** or in the **Arbor App**.



Updating, Declining and confirming Consent

Clicking on the consent form will lead you to an [Overview page](#).

The top section gives you a breakdown of 'Consent Details' which can be edited by clicking on the consent name.

[« Back](#)

Sex Education

Consent Details

Consent name	Sex Education	►
Description		►
Auto-request from guardians?	No, consents must be requested specifically.	►
User defined	No	

Academic Year2018/2019▼

Registration FormWhole school▼

Consents For Students Enrolled In 2018/2019

[+ Add](#)

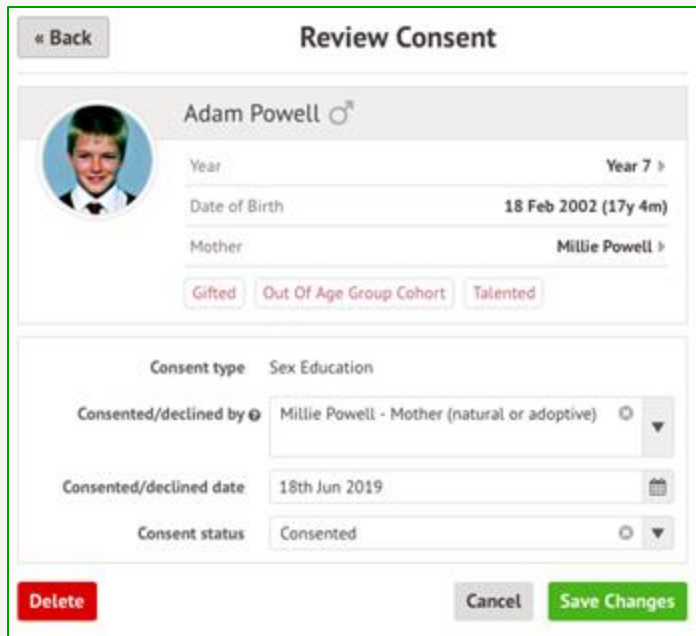
Showing 16 resultsDownload▼

☐	Student	Status	Response date	Respondee	Guardian Notes
☐	Johnson Abigail	Consented	18 Jun 2019	Johnson Toby	
☐	Powell Adam	Pending			
☐	James Callum	Declined	18 Jun 2019	James Evelyn	
☐	Wright Gavin	Consented	18 Jun 2019	Wright Connor	
☐	Pupil Guest	Pending			
☐	Suzumiya Haruhi	Declined	18 Jun 2019	Suzumiya Dad	
☐	Roberts Heather	Declined	18 Jun 2019	Roberts Ken	

If you have chosen to specifically request consents from certain guardians, select these guardians by clicking [+Add](#).

Updating, Declining and confirming Consent

To **Confirm or Decline Consent Forms**, click the student's name, a slide-over will appear for you to select the relevant information i.e. Who confirmed/declined the consent and the consent status.



The 'Review Consent' form for Adam Powell shows a profile picture, name, and gender. It includes fields for Year (Year 7), Date of Birth (18 Feb 2002), and Mother (Millie Powell). There are tags for 'Gifted', 'Out Of Age Group Cohort', and 'Talented'. The 'Consent type' is 'Sex Education'. The 'Consented/declined by' field shows 'Millie Powell - Mother (natural or adoptive)'. The 'Consented/declined date' is '18th Jun 2019'. The 'Consent status' is 'Consented'. At the bottom are 'Delete', 'Cancel', and 'Save Changes' buttons.

Consents For Students Enrolled In 2018/2019			
Showing 210 results			
☐	Student	Status	Response date
☒	Mark as Consented	Declined	07 Feb 2019
☒	Mark as Declined	Declined	07 Feb 2019
☒	Request again	Declined	07 Feb 2019
☒	Powell Adam	Declined	07 Feb 2019
☐	Hunt Adrian	Declined	07 Feb 2019

You can also bulk update consent form statuses or request the consent again by selecting multiple students, clicking on the blue pencil, and selecting the right status.

Changes

Approving Changes

To approve changes made by parents go to the [School > Data > Data Quality Dashboard](#). From the left-hand menu select [Student Record Changes > Pending](#) to see the list of pending requests.

Pending Student Record Changes

Students Apply

Showing 7 results Download

Student	Change Type	Change Request	Requested By	Request Date	Resolution
Aardvark Annabel	Update	Update guardian postal address	Anna Aardvark	02 Oct 2017	Pending
Aardvark Annabel	Create	Add Guardian	Anna Aardvark	02 Oct 2017	Pending
Aardvark Annabel	Delete	Delete telephone number	Anna Aardvark	02 Oct 2017	Pending
Potter Harry	Update	Update Ethnicity	James Potter	25 May 2018	Pending
Tets Bettie	Delete	Delete telephone number	Summayyah Mail	18 Jul 2017	Pending
Tets Bettie	Update	Update Religion	Summayyah Mail	05 Sep 2017	Pending
Tets Bettie	Update	Update Ethnicity	Summayyah Mail	18 Oct 2017	Pending

Click on the pending request you wish to action and approve or reject accordingly.

« Back **Accept/Reject Student Record Change**

Student: **Brea Ait**

Change: **Delete telephone number**

Affects: **Brea Ait** Student

Requested: **18 July 2017, 15:29, by Sumayyah Mail**
Mother (natural or adoptive)

Changes

Field	Old Value	New Value
Number	- Delete -	- Delete -
Extension number	- Delete -	- Delete -
Telephone number type	Mobile	- Delete -
Notes	- Delete -	- Delete -

Reason for Accept / Reject

Reject Changes Cancel Accept Changes

Approving Changes - Student Profile

You can also approve changes made on the parent portal by going to the student profile of the student the guardian has updated details for. Go to Change Requests from the left-hand menu.

Student Record Changes



Alison Allen ♀

Form SAK Year Year 5

Tutor Carole Richards

Showing 1 result [Download](#)

Change Type	Change Request	Requested By	Request Date	Resolution
Update	Update telephone number	Paul Allen	12 Sep 2018	Pending

[« Back](#)

Accept/Reject Student Record Change

Student Alison Allen

Change Update telephone number

Affects Paul Allen Guardian

Requested 12 September 2018, 15:20, by Paul Allen Father (natural or adoptive)

Changes

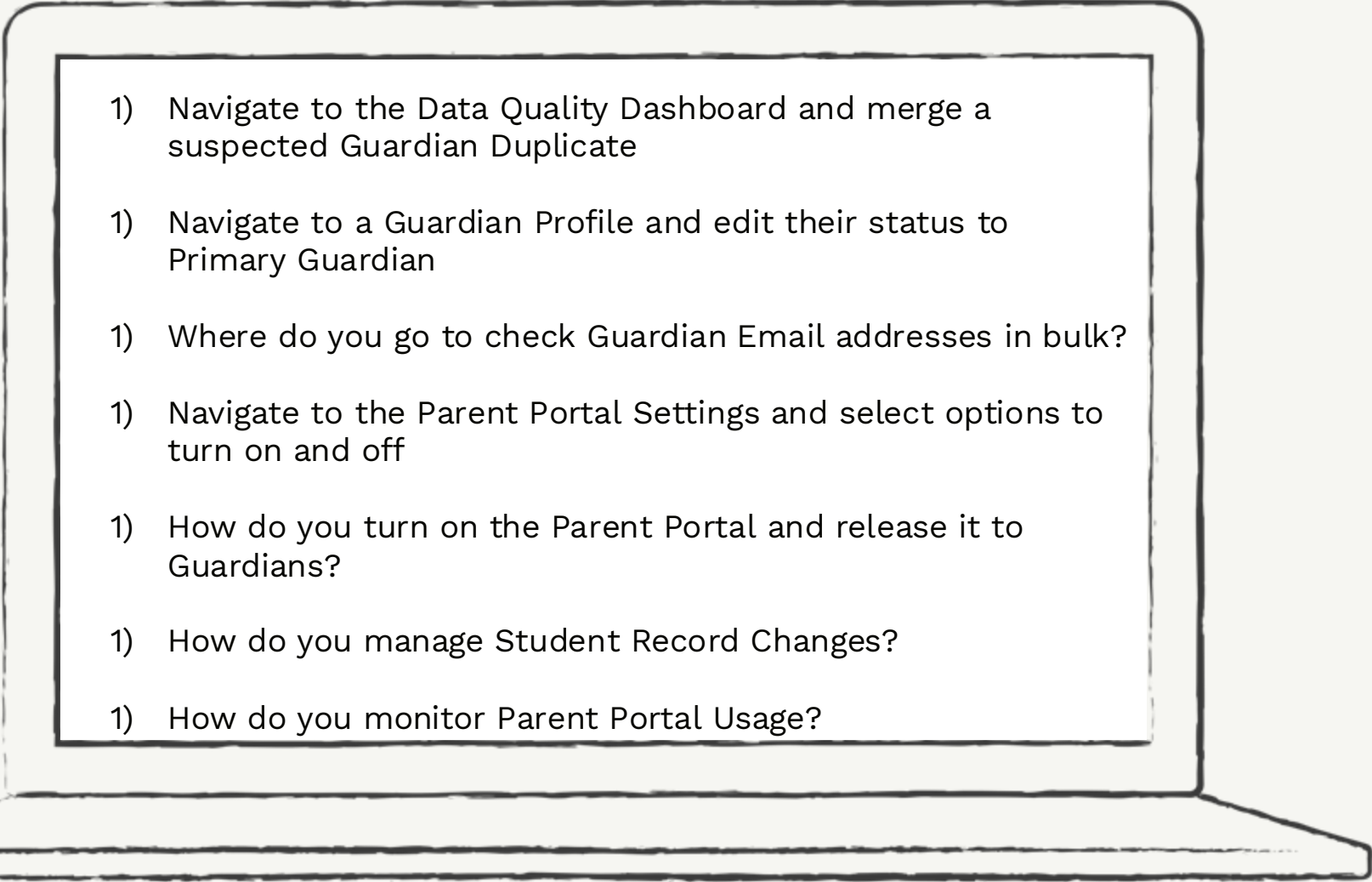
Field	Old Value	New Value
Number	+447000301641	+447413365566
Extension number		
Telephone number type	Mobile	Mobile
Notes		

Reason for Accept / Reject

[Reject Changes](#) [Cancel](#) [Accept Changes](#)

Click on the pending request you wish to action and approve or reject accordingly.

Parent Portal - Activity

- 
- 1) Navigate to the Data Quality Dashboard and merge a suspected Guardian Duplicate
 - 1) Navigate to a Guardian Profile and edit their status to Primary Guardian
 - 1) Where do you go to check Guardian Email addresses in bulk?
 - 1) Navigate to the Parent Portal Settings and select options to turn on and off
 - 1) How do you turn on the Parent Portal and release it to Guardians?
 - 1) How do you manage Student Record Changes?
 - 1) How do you monitor Parent Portal Usage?

Useful Links

[Parent Portal and the Arbor App](#)

[Guardian Details](#)

[Resolving duplicates](#)

[Settings](#)

[Reset / Resend Parent Logins](#)

[Logging in to Arbor App](#)

[Consents](#)

[Consents Video](#)

[Accepting and rejecting changes](#)

[Videos](#)

Interested in how Arbor can help?

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