

Printable checklist

Parent Portal – steps for Successful Rollout

The Parent Portal is a simple link which allows your **EXISTING** customers to log into their account via your website 24/7 and make updates to their account, such as – making payments, checking account balances, updating information, enrolling in classes or events, etc. (You control what the Portal allows).

Preparation: log into your database and also the Help Center under the Parent Portal section. There are several pages regarding Portal set-up and use. Read through each of the pages briefly, and be ready to set-up your Parent Portal!

I have found my ORG ID # and it is _____. (Found in your database under Tools>Online Web Registration). I understand my specific ORG ID # must be used in each link or html code to point to my specific database.

Task: Follow instructions on the Portal: Set-Up page (estimated time – 15 minutes to complete).

Task: Check your portal set-up by following the testing steps on the Portal: Testing and Link page.

Decision: Decide WHERE you want to place the portal link on your website pages. We recommend the Header or main Navigation bar so that it is accessible from every webpage.

Task: In your website editor, insert the link for your portal login page and save/publish/update your site. The link is found on the Portal: Testing and Link page.

Task: Ensure your staff is familiar with the portal, the email notification system, and how to handle payments and enrollments that come in via the portal.

Task: Notify your customers on how to start using the portal from your website (suggestions are on Portal: Customer Access page). Remember you can also insert a link to your portal in emails and newsletters.

Task: Use the information on the remaining Portal pages to USE your portal effectively on a daily basis.

Complete! Relax as your customers can now manage their account online and save your staff endless hours of phone calls and paper forms.