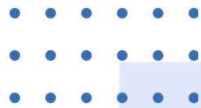# Good morning, Aeries!

Parent Data Confirmation – Part 1

Speaking today:

LESLIE STAWARZ | DIRECTOR OF TRAINING

LESLIES@AERIES.COM

MODERATORS | ELENA LOHR
CAROLE WILLIAMS

Good morning, Aeries!

- Keep topics to 30 – 45 minutes
- Show & Tell
- Casual
- Time for Q&A
- PPT & Recordings Posted

Parent Data Confirmation: Part 1

NEED TO KNOW

- Parent Data Confirmation vs Online Enrollment
- Have a plan
- Establish expected outcomes (gather documents, discuss with stakeholders)
- PDC Setup
- Parent Portal Account Requirements/Permissions
- Portal Options
- Options to use Electronic Surveys (Military, Foster, Residence, Income)
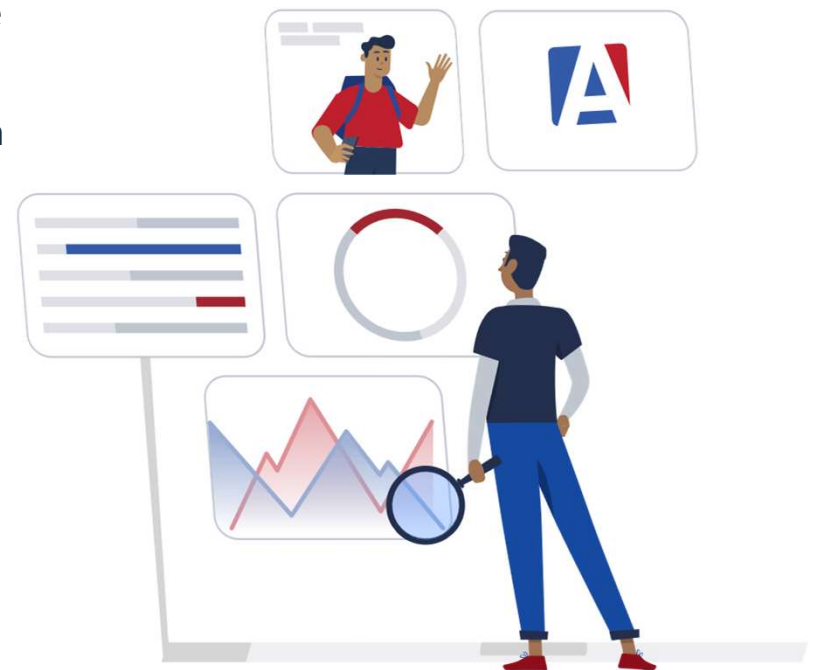- Income Survey locked once completed

Parent Data Confirmation: Part 1

NICE TO KNOW

- Language translations
- Low maintenance
- Fewer paper documents are needed to be returned
- Cost savings (time, postage, etc.)
- Immediate return of authorized data for the school year
- Ability to establish family restrictions

Parent Data Confirmation Setup

- If the option to limit Data Confirmation to **Ed Rights Holders** is enabled in [Contacts Options](#). Only those Contacts tagged with a code of **ERH = Y** can complete the Data Confirmation process.

- The **Change Details Email Address** field must contain a valid email address, but can contain multiple email addresses separated by commas

**Portal Options >
Parent Data
Confirmation >
General**

Determine Dates

Email Required

Ability to Translate

Customize Text

Recommend only gather

email from parent/guardian

Portal Options > Parent Data Confirmation > Family Information

Foster Survey Options

Military Survey Options

Residence Survey Options

| Attendance | Contacts | Grades | Gradebook | PFT | Scheduling | Miscellaneous | Parent Data Changing |

| General | Family Information | Income Survey | Medical | Authorizations | Data Confirmation | Documents | Financials |

The parent portal group must have **UPDATE** access to **PRS (Parent Response to Survey)** to access the surveys from this page.

☐ Disable Foster Survey

☐ Disable Military Survey

☐ Disable Residence Survey

Foster Survey Options ⌄

Military Survey Options ⌄

Residence Survey Options ⌄

Portal Options > Parent Data Confirmation > Family Information

Permissions – Requires Insert Permission to FRE

Enable/Disable

Use Guidelines for next year

Collects limited financial data

Portal Options > Parent Data Confirmation > Medical

Options defined in Code Table

Choose what parent views

Portal Options > Parent Data Confirmation > Authorizations

Choose date

Allow/Deny

Require a Response

Additional notes to parents

Portal Options > Parent Data Confirmation > Authorizations

Start Date-

When banner triggered

Ability for multiple dates

Lockout Mode

Thanks for joining us!

Where to Go

Parent Data Confirmation Setup

Aeries Demo Data

Aeries Academy

Parent Data Confirmation Videos

Additional Resources - Beverly Hills Unified School District

Please take a moment to complete the survey

https://survey.alchemer.com/s3/6899809/Good-Morning-Aeries-Survey

Watch for more upcoming webinars!

- End of Year Workshop

- New Year Kickoff – Pt. 1 – EOY Process

- New Year Kickoff – Pt. 2 – Checklist – Hosted

- New Year Kickoff – Pt. 3 – checklist – Non Hosted

- What To Do After Rollover

- Third Party Integrations

- New Student Enrollment

- So Many More!!!