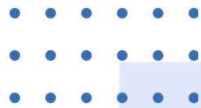


Good morning, Aeries!

Parent Data Confirmation – Part 1



Speaking today:



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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

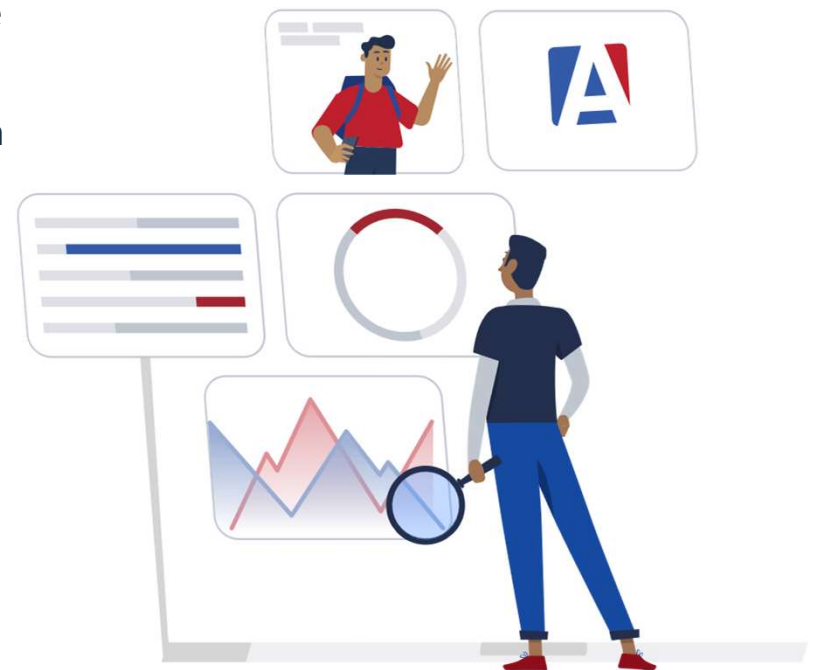
Parent Data Confirmation: Part 1

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: English

Attendance Contacts Grades Gradebook PFT Scheduling Miscellaneous Parent Data Changing

General Family Information Income Survey Medical Authorizations Data Confirmation Documents Financials

Parent Data Change Windows		More Options
Start Date	End Date	
07/15/2022	06/01/2023	Change Details Email Address: datachanging@example.
		Change Medical Details Email Address:
		General Parent Data Change Comment:

Before starting the fall registration process, please confirm your student (above) is assigned at the right school (in the banner above). If your student is enrolled in more than one school, click on the "Change Student" dropdown menu. Once you are on the right student and school, you may begin.

Portal Options > Parent
Data Confirmation >
Family Information

Foster Survey Options

Military Survey Options

Residence Survey Options

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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

The screenshot shows a web interface for configuring the 'Income Survey' section. At the top, there is a navigation bar with tabs: General, Family Information, Income Survey, Medical, Authorizations, Data Confirmation, Documents, and Financials. The 'Income Survey' tab is selected. Below the navigation bar, a yellow-bordered box contains the text: 'The parent portal group must have INSERT access to FRE (Free and Reduced) to access the survey from this page.' Below this box, there are three checkboxes: 'Disable Income Survey', 'Use eligibility guidelines for next year 2022-2023 instead of this year.', and 'Only show Income Survey if it has not been completed on or after this date.' The third checkbox is selected. Below the checkboxes, there is a text input field for a date, with a calendar icon to its right. The text above the input field reads: 'If left blank, the date used will be July 1 of the academic year that the parent is accessing.' Below the date field, there is a section titled 'Family Size Question' which contains a rich text editor. The rich text editor has a toolbar with various formatting options (bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, image, subscript, superscript, table, format dropdown) and a text area containing the question: 'How many people are in your household?'

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General Family Information Income Survey Medical Authorizations Data Confirmation Documents Financials

The parent portal group must have INSERT access to FRE (Free and Reduced) to access the survey from this page.

☐ Disable Income Survey

☐ Use eligibility guidelines for next year 2022-2023 instead of this year.

Only show Income Survey if it has not been completed on or after this date.

If left blank, the date used will be July 1 of the academic year that the parent is accessing.

Family Size Question

B I U abc [list icons] [link icon] [image icon] x₂ x² [table icon] Format

(inherited font) (inherited size) A [color icon] [background color icon] </>

How many people are in your household?

Portal Options > Parent Data Confirmation > Medical

Options defined in Code Table

Choose what parent views

Medical History/Conditions Options

Enable the following codes to be edited by parents:

Enable?	Code	Description
<input checked="" type="checkbox"/>	0A	overheats easily or running problem
<input checked="" type="checkbox"/>	0B	frequent nose bleeds
<input checked="" type="checkbox"/>	0C	severe headaches or migraines
<input checked="" type="checkbox"/>	0D	mild skin problem
<input checked="" type="checkbox"/>	0E	other non-life threatening problems
<input checked="" type="checkbox"/>	1A	sit in front to help focus
<input checked="" type="checkbox"/>	1B	sit in front to help see board
<input checked="" type="checkbox"/>	1C	sit in front to help hear
<input checked="" type="checkbox"/>	1D	sit in front - preference
<input checked="" type="checkbox"/>	1E	sit in front - Dr/Nurse request
<input type="checkbox"/>	2*	major eye problem see info sheet
<input checked="" type="checkbox"/>	2A	wears glasses all the time

*Codes on this page are defined in the code table. To modify descriptions or add/remove codes [click here](#), and select table MHS and field CD.

Portal Options > Parent
Data Confirmation >
Authorizations

Choose date

Allow/Deny

Require a Response

Additional notes to parents

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General

Family Information

Income Survey

Medical

Authorizations

Data Confirmation

Documents

Financials

Authorization and Prohibition Options

Display AUT Values Effective On or After this Date: 07/01/2014

Enable the following codes to be edited by parents:

Allow Parent to Mark...		Require a Response	Code	Type	Description	Additional Notes to display to parent
Allow [Text]	Deny [Text]					
<input checked="" type="checkbox"/> Allow	<input checked="" type="checkbox"/> Deny	<input checked="" type="checkbox"/>	A	1	Include in Student Address Directory Listing	
<input checked="" type="checkbox"/> Intere	<input checked="" type="checkbox"/> Not Ir	<input checked="" type="checkbox"/>	AI	1	Voluntary Student Accident Insurance	
<input type="checkbox"/> Allow	<input checked="" type="checkbox"/> Deny	<input type="checkbox"/>	I	1	Use the Internet	
<input checked="" type="checkbox"/> Allow	<input checked="" type="checkbox"/> Deny	<input checked="" type="checkbox"/>	M	1	Release Records to Military	
<input checked="" type="checkbox"/> Allow	<input checked="" type="checkbox"/> Deny	<input checked="" type="checkbox"/>	PH	1	Photo allowed in yearbook	Allow will ensure that the student photo is included in the school yearbook.
<input type="checkbox"/> Allow	<input checked="" type="checkbox"/> Deny	<input type="checkbox"/>	S	1	Surveys Permitted	
<input type="checkbox"/> Allow	<input checked="" type="checkbox"/> Deny	<input type="checkbox"/>	T	1	Release of Student Transcripts	
<input checked="" type="checkbox"/> Allow	<input type="checkbox"/> Deny	<input type="checkbox"/>	W	1	Use on District Website	

Portal Options > Parent
Data Confirmation >
Authorizations

Start Date-
When banner triggered

Ability for multiple dates

Lockout Mode

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General

Family Information

Income Survey

Medical

Authorizations

Data Confirmation


Documents


Financials


Parent Data Confirmation Start Dates


Each Date identified below will trigger parents to be prompted to go through the data confirmation process.


05/11/2022

















Parent Data Confirmation Lockout Dates


In lockout mode the parent can ONLY confirm data, and will not be able to navigate to other areas of the portal until that process is completed.


05/11/2022
















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!!!

