FAMILY PORTAL GUIDE

APRIL 7, 2023

Contents

1. Creating an Account – New Families/Students

The process below is for families or students who are **_not_** currently enrolled in this international student program. If the family already has a student enrolled in this international student program, see the *Creating an Account – Existing Families / Students* section of this guide.

Step 1:

Navigate to the Secure Family Portal page. This link will be provided by the international student program.

Step 2:

Click the **Parents Start Here** link (wording may be different depending on configuration).

Parent Start Here
For parent contacts of enrolled students or parents who are not working with an agency and wish to create and submit online student applications.

Step 3:

Click the **Create Account** link.

Reset Password

Create Account

Portal Home

Step 4:

Enter the required information in the **Account Details** screen.

Account Details

First Name: * Morticia ①

Last Name: * Addams ②

Email: * addams@email.com ✅ ③

Password Requirements:

- minimum of **8 characters** in length
- contain at least one lower case letter **(a-z)**
- contain at least one upper case letter **(A-Z)**
- contain at least one number **(0-9)**
- contain at least one of the following symbols: **!@#$&**

Password: * •••••••••• ④

Retype Password: * •••••••••• ⑤
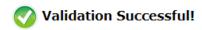
Back   Create Account   ⑥

An **Account Creation Successful** message will appear, notifying the user that an email has been sent. Check junk/spam folders if the email is not received within 15 minutes.

✅ **Account Creation Successful!**

Please check your email inbox for a validation email which require

Please note you have 24 hours to complete this process.

Return to Sign In page.

Step 5:

Check your inbox for a message with subject starting with "User Account Verification". **Click the link to complete the account creation**. You will get the following message:

Click the Sign In link to return to the sign in page.

Step 6:

Enter the email and password used to create the account and click the Sign In button.

Step 7:

Read the TRUE North Privacy Policy and click **I Accept and Agree** to proceed to the family portal.

Congratulations! You have created a family portal account!

2. Accessing Account – Existing Families/Students

The process below is for families with students **_already_** currently enrolled in this international student program. Parents/guardians of students already enrolled in the international student program must exist as a contact in the TRUE North database and have a valid email address. Contact the international student program for assistance, if needed.

If the family does not have a student currently enrolled in this international student program, see the *Creating an Account – New Families/Students* section of this guide.

<u>Step 1</u>:

Navigate to the Secure Family Portal page. This link will be provided by the international student program.

<u>Step 2</u>:

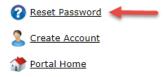Click the **Parents Start Here** link.

> **Parent Start Here**
> For parent contacts of enrolled students or parents who are not working with an agency and wish to create and submit online student applications.

Enter the email address **associated with the parent or student** and password.

If you do not know your password, proceed with steps 3 to 9.

## <u>Step 3</u>: Click the **Reset Password** link. **Only click this link once**. ## <u>Step 4</u>:	❓ Reset Password ⬅ 👤 Create Account 🏠 Portal Home

Enter your email address. **This must be the email address on file**. Click the **Reset Password** button. You will see a confirmation message that an email has been sent.

Reset Password

To request a password reset, enter your email address and press the Reset Password button. An email will be delivered with instructions.

Email Address: ★ angelinefowl@email.com ✅

[Back] [Reset Password]

✅ **Reset Password Request Received**

An email has been sent to angelinefowl@email.com with instructions on how to reset your password. Please note this request must be used within 12 hours.

Step 5:

Check your inbox for a message with subject starting with "Password Reset Instructions". If you do not see this message within five minutes, please check your junk/spam folder. **Click the link to complete the password request**. You will get the following message:

Reset Password Request Complete

An email has been sent to angelinefowl@email.com : with your new password.

Return to Sign In.

Step 6:

Return to your email inbox and locate a new message with subject which starts with "Your Reset Password for". **Copy the temporary password to your clipboard or make note of it for logging in**. Click the Sign In link from the message in Step 5.

Your Reset Password for Presentation

DO NOT REPLY TO THIS EMAIL

This is an automated message from Presentation. Please do not reply.

You are receiving this message because a reset password request for the Secure Family Portal has been completed.

Your sign in email is: angelinefowl@email.com

Your new temporary password is: wWr368kC$2aX

Login to the Secure Family Portal using the above credentials.

Step 7:

Login using your **email address** and **temporary password** copied from the email in Step 6.

Step 8:

Change your password by entering the "temporary" password from the email in Step 6, and a new password of your choosing. Click the **Change Password** button.

Click **Continue**.

Password Change Complete

Continue

Step 9:

Read the TRUE North Privacy Policy and click **I Accept and Agree** to proceed to the family portal.

Congratulations! You have created a family portal account!

3. Navigation Menus

The top menu bar provides access to topics of information for the family.

| Home | Application | Students | Invoices | Account | Signed in as Cake, Coco (parent) |

Home: Displays quick links for applications and invoices.

Application:

- View applications instructions for preparing an application.
- Create, view and edit applications.

Note: In **View Applications,** *pay attention to expired applications that indicate they will be auto-deleted! Once deleted, they cannot be retrieved.*

Students:

- Shows students associated with this family.
- Shows documents for students associated with this family.
- Allows the family to upload documents to the student record for the international student program.

Invoices:

- Invoices may be filtered by paid or unpaid using the **Invoice Paid** dropdown.
- View and print invoices shared by the international program. Many international student programs are now integrated with payment gateways and offer direct payment links for **Western Union** or **Flywire**. See *Student Invoices* section of this guide.

Account: Ability for the parent to view account details, change a password, set notifications, access online help and sign out of the family portal.

When moving between menus, or returning to a previous screen, use the "breadcrumb" trail, or the

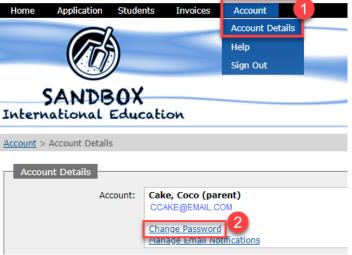Back button, rather than the internet browser back button.

Application > View Applications > Edit Application ⬅ breadcrumb trail
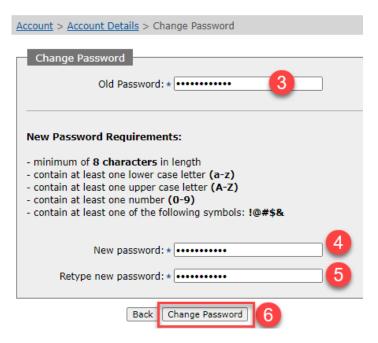
4. Changing Your Password

Once an account is created, you can change your password, set up notifications to be delivered by email when new information is available in the portal, and access online help information in the **Account** menu.

1. Go to **Account** > **Account Details**.
2. Click the **Change Password** link.

3. Enter the password you used to log into your account in the **Old Password** field.
4. Enter a new password in the **New password** field. Your new password must meet the *New Password Requirements* shown on the screen.
5. Enter the new password again in the **Retype new password** field.
6. Click the **Change Password** button to save the change.

5. Set Email Notification Preferences

Families can set up notifications to ensure communications or information from an international student program are not missed.

1. Go to **Account** > **Account Details**.
2. Click the **Manage Email Notifications** link.

3. Use the dropdown menu in **Portal Message Notifications** and **Other Portal Notifications** to select how often you want to be notified of new communications and information sent to the portal from an international student program.

4. Click **Update Notifications** to save the settings.

6. The Home Page

Date Sensitive Information: This area highlights items that require action by the family. Click the blue links to see the list of records associated with an action item.

Quick Links: Provides one-click access to commonly used menus in the portal.
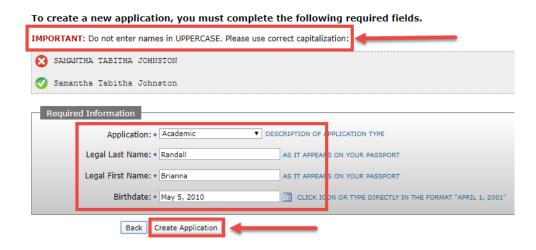
- **Application Instructions**: Provide guidelines and expectations for applying and outline documentation that must be submitted with the application. It is important to note that these guidelines and expectations can vary by international student program.
- **Create New Application:** Begin a new an application for a student.
- **View Applications**:   View existing applications in progress or submitted. ***This is an important screen to pay attention to!*** It provides: the status of applications, allows you to continue working on an application, as well as warnings about applications about to be deleted due to non-completion.
- **View Students:** Ability to view all students associated with the family.
- **View Documents**: Ability to view documents share to and from the family portal for students.
- **View Invoices:** Ability to view invoices, generate receipts, and initiate secure payment.

7. Creating an Application

1. On the **Home** page, click on and read **Application Instructions**. When done, click the [Back] button or click **Home** in the top menu bar to return to the Home page.
2. Click on **Create New Application**.
3. Select the application type (if more than one) and enter the student's legal last name, legal first name and birthdate.
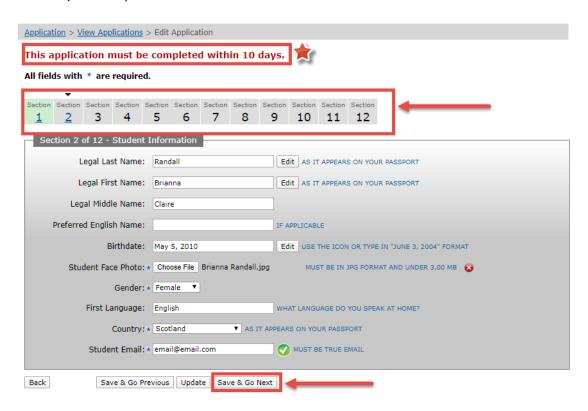4. Click **Create Application** to create a new student application record.

5. **Note that applications expire and may be auto-deleted after the expiry date!** Observe the number of days within which the application must be completed. Different buttons appear at the bottom of each section.
   - **Back**: Takes the applicant to *Applications > View Applications*. Once *Create Application* has been clicked in the application process, all in-progress and declined student applications appear here.
   - **Save & Go Previous**: Saves the information entered in the current section and returns to a previous section.
   - **Update**: Saves updated information in the current section.
   - **Save & Go Next**: Saves the information in the current section and moves forward to the next section.

6. Sections of the application will be displayed for completion. The number of sections and information requested can vary by international student program.

7. Complete the information in each section and use **Save & Go Next** at the bottom of the section to move to the next section. Once this is done, completed section numbers will turn green to show that they are complete.

8. In the final section, a **Save & Submit Completed Application** will appear. When this is clicked, no further changes cannot be made to the application.

Note: For international student programs using payment gateways (Western Union or Flywire), a secure payment link may appear for online payment of the application fee. Follow payment instructions indicated to submit the application payment.
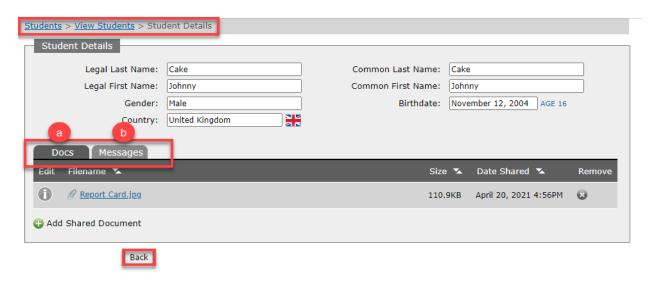
8. Students > View Students

1. In the **Students** menu option, select **View Students**.

2. Click the details icon of the student to be viewed.

3. Basic demographics will be displayed, along with:

    a. **Docs** tab: Displays documents shared between the famly and the international student program. Click the document link to view the document.
    b. **Messages** tab: Displays secure messages sent to the family from the international student program. Click the Message Details icon to view the message.

4. Click the **Back** button to return to the list of students.

Note: See the *Sharing a Document* and *Students > View Secure Messages* sections of this guide for additional information.

9. Sharing a Document

Families can now submit documents to an international student program through the family portal after an application has been approved.
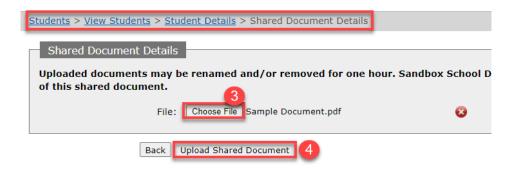
1. In the **Students > View Students** menu, click the **Details** icon for the student that needs a document added.

2. In the **Docs** tab for the student, click the Add Shared Document icon.

3. Use the **Choose File** button to select the document from your computer.

4. Click **Upload Document** to complete the submission. The document will appear on the student record. After 60 minutes, the file can not be replaced or removed. The international student program will receive a notification that a new document has been submitted.
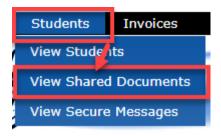
10. Students > View Shared Documents

This new function allows parents to go to one spot in the portal to view all documents shared with an international student program.

1. In the **Students** menu, select **View Shared Documents**.

2. Documents will be displayed in the list. The filters can be used to reduce the list of documents. Click on a filename to view the document.
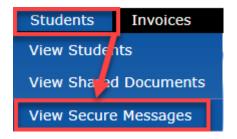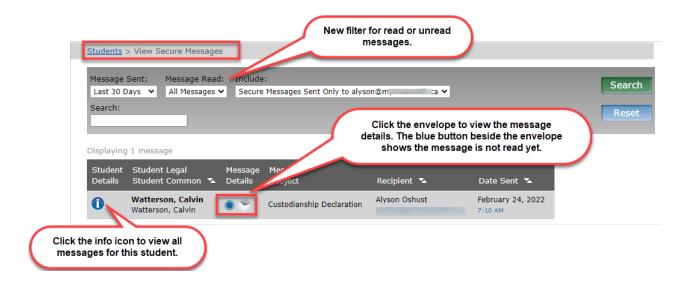
11. Students > View Secure Messages

This new function allows families to go to one spot in the portal to view all secure messages received from an international student program.

Messages received in the last 7 days can be viewed by clicking the *Secure Messages* link on the portal Home page. Messages older than 7 days can be viewed in *Students > View Secure Messages*.

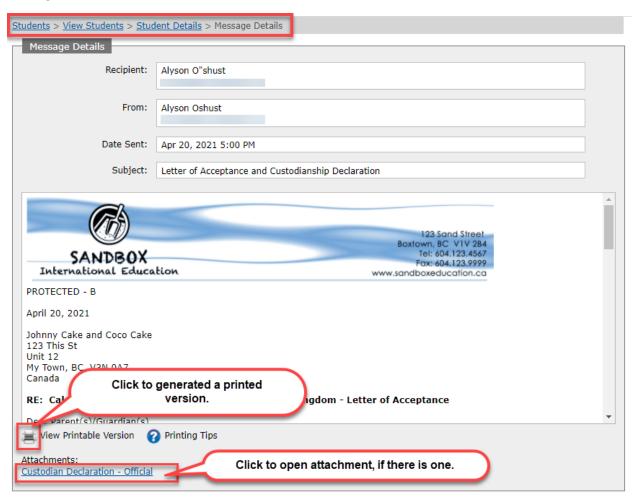1. In the **Students** menu, select **View Secure Messages**.

2. Use the filters at the top to define a period of time, and the type of messages to be viewed.
3. Click **Search** to find messages that match the filters selected.
4. Click the **Details** icon beside a student name will show a list of messages for that student.
5. In the list of messages, click the Envelope icon to view the details of a message.

In the details of a message, *View Printable Version* can be clicked to generate a printed copy of the message.
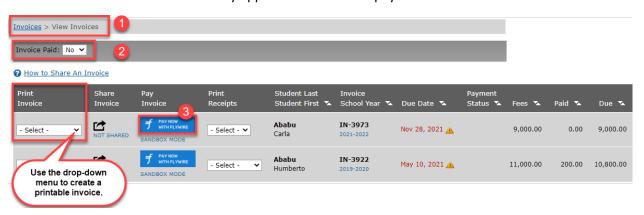
12. Viewing Student Invoices

Student invoices can also be viewed in the family portal. In cases where the international student program is using a payment gateway **such as Flywire** or **Western Union**, the user may also be able to pay the student fees online. See the *Using Payment Gateways* section of this guide for instruction.
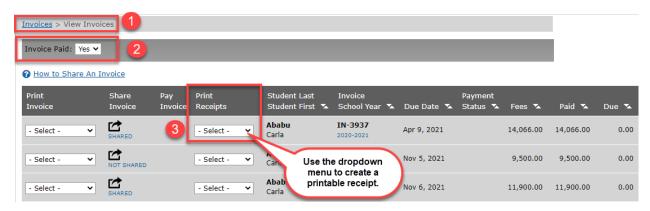
Viewing Unpaid Invoices

1. In the **Invoices** menu, select **View Invoices**.
2. In the **Invoice Paid** drop-down, select **No**.
   a. Use the **Print Invoice** dropdown to generate a pdf version of the invoice.
   b. Where the international student program is associated with a payment gateway, an additional button may appear for the user to pay the invoice online.

Viewing Paid Invoices and Printing Receipts

1. In the **Invoices** menu, select **View Invoices**.
2. In the **Invoice Paid** drop-down, select **Yes**.
3. Use the dropdown menu under **Print Receipts** to generate a pdf receipt.
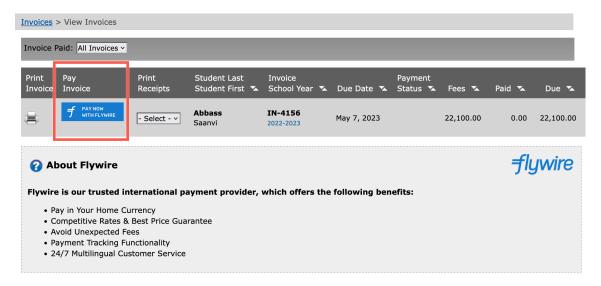
13. Using Payment Gateways

For international student programs that are integrated with a financial payment gateway such as Flywire or Convera, invoices can be securely paid directly from the portal.

1. In the **Invoices** menu, select **View Invoices**.
2. Click the **Pay Invoice** button to begin the payment process.

Flywire Integration:

Convera Integration: