



# FAMILY PORTAL GUIDE

APRIL 7, 2023

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## 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).

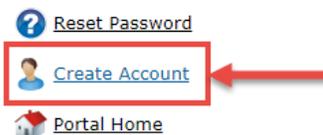


**Parent Start Here**

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.



### Step 4:

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

Account Details

First Name: \*  1

Last Name: \*  2

Email: \*  3

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**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

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 requires

**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:

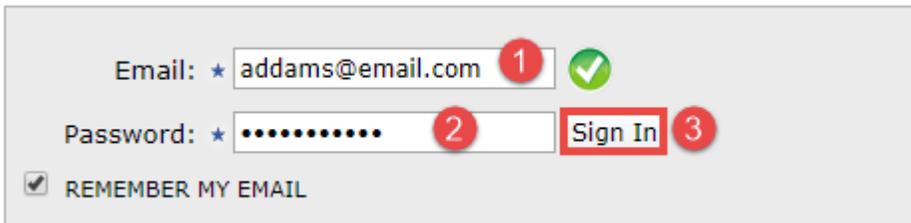
 **Validation Successful!**

Return to [Sign In](#) page.

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.



The screenshot shows a sign-in form with the following elements:

- Email field: \* addams@email.com (1) with a green checkmark icon.
- Password field: \* [redacted] (2) with a "Sign In" button (3).
- Checkbox:  REMEMBER MY EMAIL

### **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.

### **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.



**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.**

### **Step 3:**

Click the **Reset Password** link. **Only click this link once.**

 [Reset Password](#) 

 [Create Account](#)

 [Portal Home](#)

### **Step 4:**

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: \*  



**Reset Password Request Received**

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

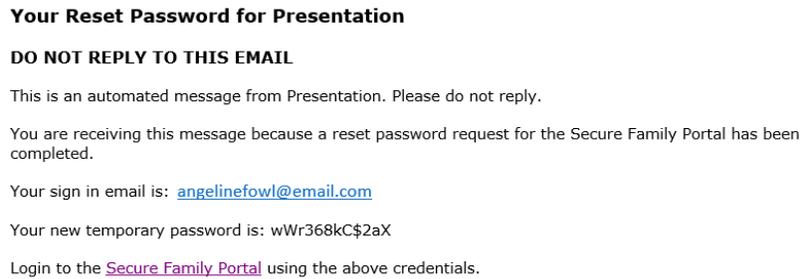
### **Step 5:**

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:



### **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.



### **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**.



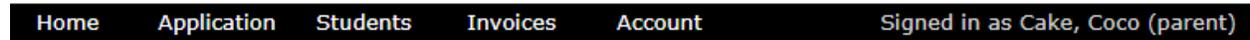
### **Step 9:**

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:** 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

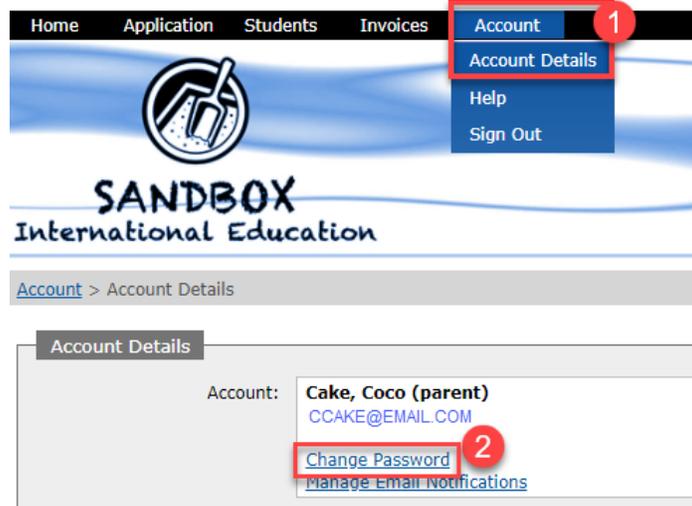
 button, rather than the internet browser back button.



## 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.

[Account](#) > [Account Details](#) > Change Password

**Change Password**

Old Password: \*  3

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**New 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: **!@#\$\$&**

New password: \*  4

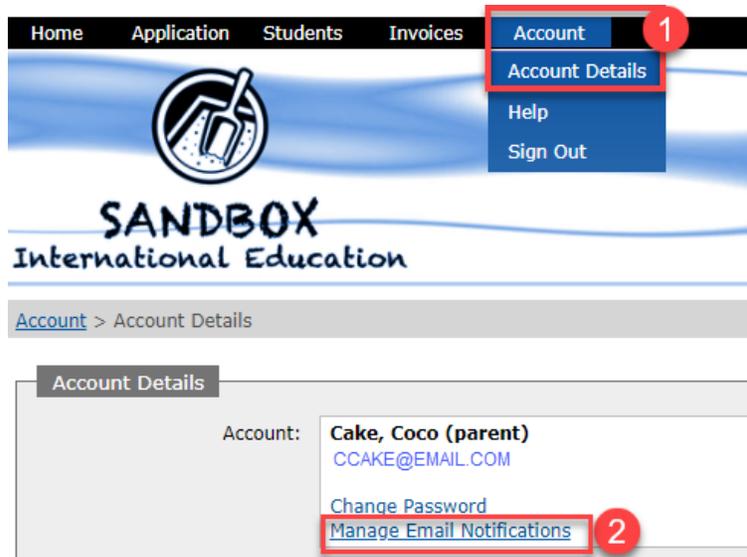
Retype new password: \*  5

6

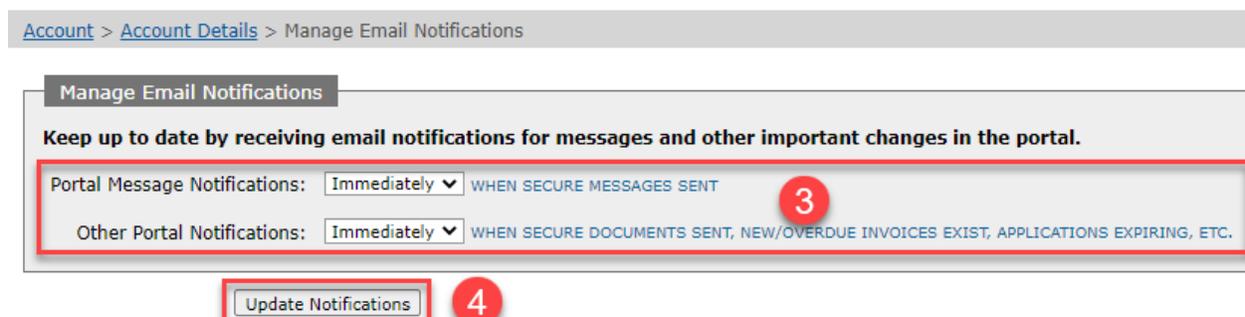
## 5. Set Email Notification Preferences

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.

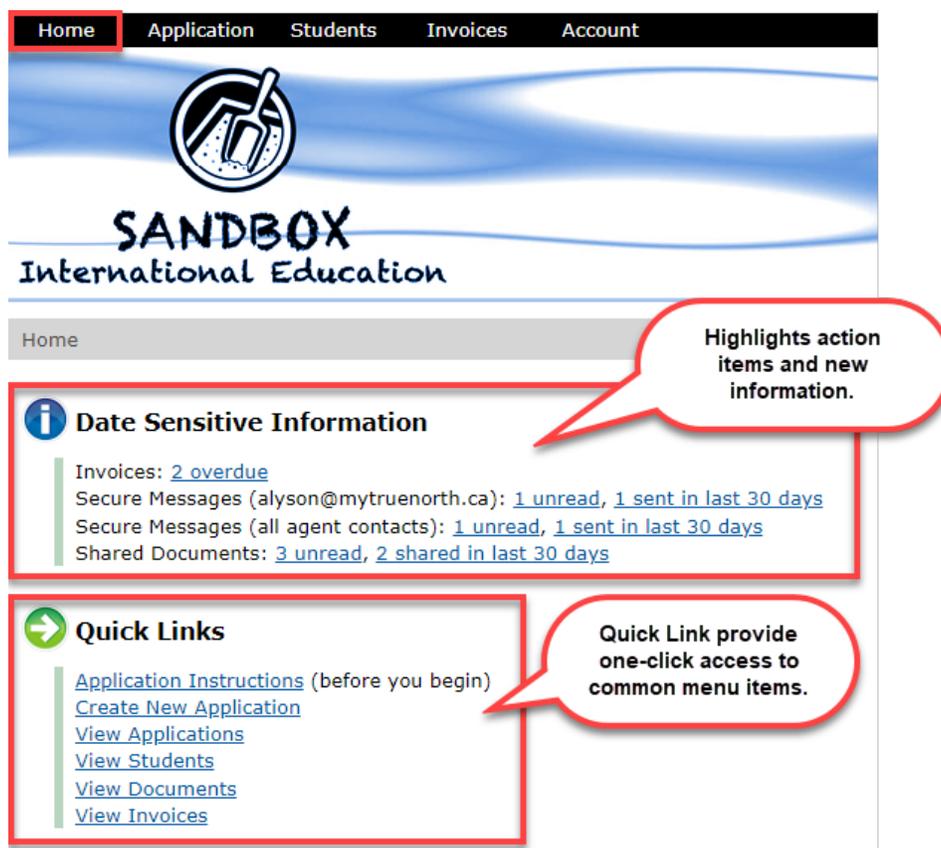


## 6. The Home Page

**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.



The screenshot shows the home page of the Family Portal. At the top, there is a navigation bar with links for Home, Application, Students, Invoices, and Account. Below this is a banner for 'SANDBOX International Education' featuring a logo of a pencil and paper. The main content area is divided into two sections:

- Date Sensitive Information:** This section is highlighted with a red box and a callout bubble that says 'Highlights action items and new information.' It contains the following information:
  - Invoices: [2 overdue](#)
  - Secure Messages (alyson@mytruenorth.ca): [1 unread](#), [1 sent in last 30 days](#)
  - Secure Messages (all agent contacts): [1 unread](#), [1 sent in last 30 days](#)
  - Shared Documents: [3 unread](#), [2 shared in last 30 days](#)
- Quick Links:** This section is also highlighted with a red box and a callout bubble that says 'Quick Link provide one-click access to common menu items.' It contains the following links:
  - [Application Instructions](#) (before you begin)
  - [Create New Application](#)
  - [View Applications](#)
  - [View Students](#)
  - [View Documents](#)
  - [View Invoices](#)

## 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.

To create a new application, you must complete the following required fields.

**IMPORTANT:** Do not enter names in UPPERCASE. Please use correct capitalization:

SAMANTHA TABITHA JOHNSTON  
 Samantha Tabitha Johnston

**Required Information**

Application: \* Academic DESCRIPTION OF APPLICATION TYPE  
 Legal Last Name: \* Randall AS IT APPEARS ON YOUR PASSPORT  
 Legal First Name: \* Brianna AS IT APPEARS ON YOUR PASSPORT  
 Birthdate: \* May 5, 2010 CLICK ICON OR TYPE DIRECTLY IN THE FORMAT "APRIL 1, 2001"

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.

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

Application > [View Applications](#) > Edit Application

**This application must be completed within 10 days.** ★

All fields with \* are required.

| Section |
|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| 1       | 2       | 3       | 4       | 5       | 6       | 7       | 8       | 9       | 10      | 11      | 12      |

**Section 2 of 12 - Student Information**

Legal Last Name:   AS IT APPEARS ON YOUR PASSPORT

Legal First Name:   AS IT APPEARS ON YOUR PASSPORT

Legal Middle Name:

Preferred English Name:  IF APPLICABLE

Birthdate:   USE THE ICON OR TYPE IN "JUNE 3, 2004" FORMAT

Student Face Photo: \*  Brianna.Randall.jpg MUST BE IN JPG FORMAT AND UNDER 3.00 MB ✖

Gender: \*

First Language:  WHAT LANGUAGE DO YOU SPEAK AT HOME?

Country: \*  AS IT APPEARS ON YOUR PASSPORT

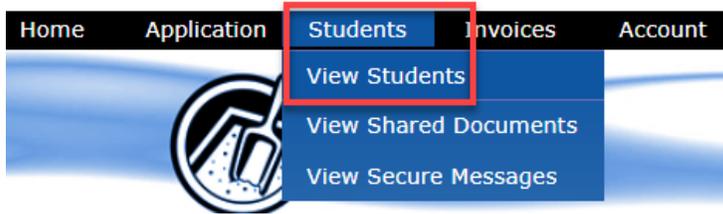
Student Email: \*  ✔ MUST BE TRUE EMAIL

- 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 family 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.

Students > View Students

Show:  Legal Last Name:  Legal First Name:

Current Students

Details	Student Legal Student Common	Birthdate	TRUE North ID	Latest Enrolment	Shared Files	Country
<b>i</b>	<b>Cake, Johnny</b> Cake, Johnny	November 12, 2004	6063	Sep 1, 2020 JUN 30, 2021	1	United Kingdom

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

Students > View Students > Student Details

Student Details

Legal Last Name:  Common Last Name:   
 Legal First Name:  Common First Name:   
 Gender:  Birthdate:  AGE 16  
 Country:

Docs Messages

Edit name Size Date Shared Remove

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.

Students > View Students > Student Details > Shared Document Details

Shared Document Details

Uploaded documents may be renamed and/or removed for one hour. Sandbox School D of this shared document.

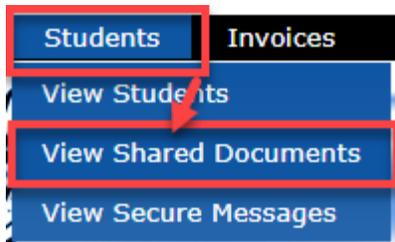
File:  Sample Document.pdf

**4**

## 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.

The screenshot shows the 'View Shared Documents' interface. A red box labeled '1' highlights the breadcrumb 'Students > View Shared Documents'. Another red box labeled '2' highlights the filter section, which includes 'Document Shared' (set to 'Last 30 Days'), 'Document Read' (set to 'All Documents'), and three search input fields for 'Document Name', 'Student Legal Last Name', and 'Student Legal First Name'. A third red box labeled '3' highlights a blue button next to the filename 'Bam Bam Family.jpg' in a table of documents. A callout bubble points to this button with the text: 'Click to view the document. The blue button indicates the document is not read yet.'

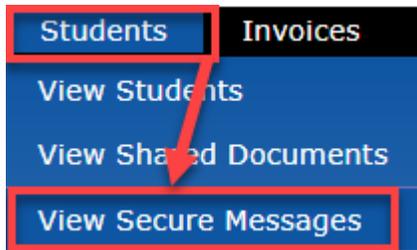
Student Details	Student Legal Student Common	Filename	Size	Date
	<b>Rubble, Baby</b> Rubble, Baby	<a href="#">Bam Bam Family.jpg</a> SHARED FROM TRUE NORTH	129.8KB	March 4, 2022 2:55 PM
	<b>Rubble, Baby</b> Rubble, Baby	<a href="#">Report Card.jpg</a> SHARED FROM TRUE NORTH	110.9KB	February 23, 2022 7:26 PM

## 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.

A screenshot of the 'Students > View Secure Messages' interface. The breadcrumb 'Students > View Secure Messages' is highlighted with a red box. The interface includes filter dropdowns for 'Message Sent' (Last 30 Days), 'Message Read' (All Messages), and 'include:' (Secure Messages Sent Only to alyson@m...ca). A 'Search' button and a 'Reset' button are also visible. Below the filters, it says 'Displaying 1 message'. A table lists the message details for 'Watterson, Calvin'. The table has columns for Student, Student Legal, Message, Message Subject, Recipient, and Date Sent. The message is titled 'Custodianship Declaration' and was sent to 'Alyson Oshust' on 'February 24, 2022' at '7:10 AM'. There are three callouts: 1. 'Click the info icon to view all messages for this student.' pointing to the info icon (i) next to the student name. 2. 'Click the envelope to view the message details. The blue button beside the envelope shows the message is not read yet.' pointing to the envelope icon (blue circle with white envelope) next to the message. 3. 'New filter for read or unread messages.' pointing to the 'include:' dropdown menu.

Student	Student Legal	Message	Message Subject	Recipient	Date Sent
<i>Details</i>	Student Common	<i>Details</i>			
<i>i</i>	Watterson, Calvin	<i>envelope</i>	Custodianship Declaration	Alyson Oshust	February 24, 2022 7:10 AM

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

[Students](#) > [View Students](#) > [Student Details](#) > Message Details

**Message Details**

Recipient: Alyson O'shust

From: Alyson Oshust

Date Sent: Apr 20, 2021 5:00 PM

Subject: Letter of Acceptance and Custodianship Declaration

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**SANDBOX**  
International Education

123 Sand Street  
Boxtown, BC V1V 2B4  
Tel: 604.123.4567  
Fax: 604.123.9999  
[www.sandboxeducation.ca](http://www.sandboxeducation.ca)

PROTECTED - B

April 20, 2021

Johnny Cake and Coco Cake  
123 This St  
Unit 12  
My Town, BC V3N 0A7  
Canada

**RE: Cal** Kingdom - Letter of Acceptance

Dear parent(s)/Guardian(s)

 [View Printable Version](#)  [Printing Tips](#)

Attachments:  
[Custodian Declaration - Official](#)

**Click to generated a printed version.**

**Click to open attachment, if there is one.**

## 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.

**Invoices > View Invoices** 1

Invoice Paid: No 2

[How to Share An Invoice](#)

Print Invoice	Share Invoice	Pay Invoice	Print Receipts	Student Last Student First	Invoice School Year	Due Date	Payment Status	Fees	Paid	Due
- Select -	NOT SHARED	PAY NOW WITH FLYWIRE SANDBOX MODE	- Select -	Ababu Carla	IN-3973 2021-2022	Nov 28, 2021 ⚠️		9,000.00	0.00	9,000.00
- Select -	NOT SHARED	PAY NOW WITH FLYWIRE SANDBOX MODE	- Select -	Ababu Humberto	IN-3922 2019-2020	May 10, 2021 ⚠️		11,000.00	200.00	10,800.00

Use the dropdown menu to create a printable invoice.

### 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.

**Invoices > View Invoices** 1

Invoice Paid: Yes 2

[How to Share An Invoice](#)

Print Invoice	Share Invoice	Pay Invoice	Print Receipts	Student Last Student First	Invoice School Year	Due Date	Payment Status	Fees	Paid	Due
- Select -	SHARED		- Select -	Ababu Carla	IN-3937 2020-2021	Apr 9, 2021		14,066.00	14,066.00	0.00
- Select -	NOT SHARED		- Select -	Ababu Carla		Nov 5, 2021		9,500.00	9,500.00	0.00
- Select -	SHARED		- Select -	Ababu Carla		Nov 6, 2021		11,900.00	11,900.00	0.00

Use the dropdown menu to create a printable 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:

[Invoices](#) > View Invoices

Invoice Paid: All Invoices ▾

Print Invoice	Pay Invoice	Print Receipts	Student Last Student First ▾	Invoice School Year ▾	Due Date ▾	Payment Status ▾	Fees ▾	Paid ▾	Due ▾
	PAY NOW WITH FLYWIRE	- Select - ▾	<b>Abbass</b> Saarvi	<b>IN-4156</b> 2022-2023	May 7, 2023		22,100.00	0.00	22,100.00

**About Flywire**

**Flywire is our trusted international payment provider, which offers the following benefits:**

- Pay in Your Home Currency
- Competitive Rates & Best Price Guarantee
- Avoid Unexpected Fees
- Payment Tracking Functionality
- 24/7 Multilingual Customer Service

### Convera Integration:

[Invoices](#) > View Invoices

Invoice Paid: All Invoices ▾

Print Invoice	Pay Invoice	Print Receipts	Student Last Student First ▾	Invoice School Year ▾	Due Date ▾	Payment Status ▾	Fees ▾	Paid ▾	Due ▾
		- Select - ▾	<b>Abbass</b> Saarvi	<b>IN-4156</b> 2022-2023	May 7, 2023		22,100.00	0.00	22,100.00

**Why choose Convera:**

**Convera is our trusted partner with secure online international payments, which offers the following benefits:**

- Students, parents, and sponsors can use this platform to pay deposits, tuition fees and more
- Avoid costly transaction charges from your bank
- Pay online via popular options including bank transfer, credit, or debit card or eWallet
- Compare payment options instantly and Convera holds the exchange rate for 72 hours
- If you find a cheaper quote from your bank, Convera will match it with their Price Promise Guarantee
- Track your payment status by SMS and email
- Multilingual platform available in 10 languages
- Access 24/7 live chat on the platform or contact our friendly team: studentsupport@convera.com
- A platform built with security in mind so that your money is protected
- Ability to initiate refunds easily should circumstances change
- Pay your fees via a global partner which has been helping students achieve their education dreams for over a decade