Supporting the Student's Contacts: Password Resets & Account Creation/Modification

Instructions for NHPS (school) Staff and Help Desk

*"**Contacts**" refer to Parents, Guardians, relatives or other Care Providers*
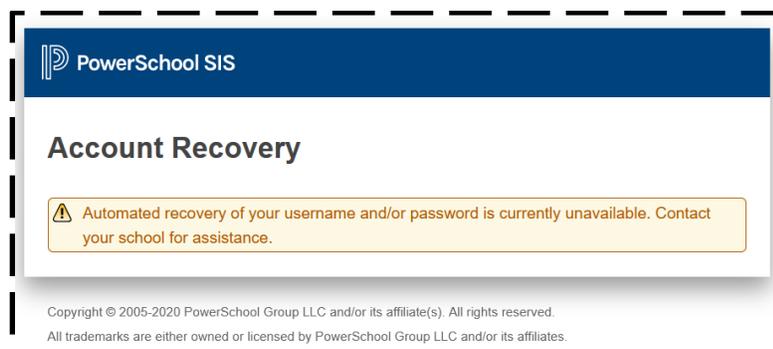**This is a draft/beta version released to several staff for testing and feedback. Jim Kopcik, 12/01/2020**

Following are notes and limited instructions to support the Student's Contacts information with focus toward PowerSchool Portal user accounts for persons allowed to sign-and access the Student's records. The relevant Student and Contact screens will be shown with descriptions/explanations, relationship to other screens/fields, the effect of missing data and some best-practice notes.

This is not intended to provide specific steps to address **all or even most** of the possible situations. Where applicable, task suggestions and sequence-sensitive steps will be provided.

The following support is best provided by school staff. 'At-School' Staff would have better awareness of family situations/concerns as compared to Central/District Office Staff. However, Central/District Office Staff may provide support per request or guidance of school staff.

Escalate unresolvable issues to the Help Desk.

Note: The "**Forgot Username or Password?**" option on the portal sign-in screen will not provide the expected result. It now returns the following response.

Contents

Common Issues:

- Parent needs their password reset.
- Parent hasn't created their account
- Parent has multiple user accounts for the same student/child.
- Parent has multiple user accounts for multiple students/children – linked
- Parent has multiple user accounts for multiple students/children – not linked

Helpful Screens:

New/Temporary Passwords (aka reset)

- Accomplished with the **<u>Contact Details</u>** screen.
  1) Search/Select Student's record.
  2) Select the **<u>Contacts</u>** option from the main menu. It's found in the **Information** section near the top of the menu.
  3) If more than one Contact is listed, select the Data Access record (the check-mark in the Data **Access** field (far right of record/screen). You may have to move the horizontal scroll bar to see it.
  4)

  i)

  5) Click the name/email address to access the **<u>Contact Details</u>** screen.
  6) If there isn't a contact record with Data Access enabled, refer to the Instructions to Create Portal Account section.
- If the **<u>Active</u>** box in the **Demographics** sectio is not **checked**, the contact will not be able to sign-in to the PowerSchool portal. If you're not sure why the account isn't active, consult the school's office staff or administration in case there is a reason.
- Similarly, if the **<u>Web Account Access</u>** is not **enabled** consult the school's office staff or administration in case there is a reason
  - A contact needs to be both active and enabled to access the student's information.
  - If the Contact doesn't have information in the Web Account Access (Username and Email), they will need to create a portal account. Refer to the Instructions to Create Portal Account section.

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- A Contact may have more than one Web Account. They may have created one earlier in the year or a prior year and forgot they had. Or they created one for another student and didn't realize they could link all their students to their one account. This is an opportunity to disable/deactivate an obsolete account.
- Before changing the Contact's password, confirm the spelling of the username and email address. The username and email address can also be made here
  - FYI: Usernames should be less than 20 characters. The can have uppercase, lowercase characters and number.
  - Passwords have more restrictions see below.

- After a password reset, the **new/temporary password** will need to be changed during the contact's first sign-in. The new/temp password (set by you/Staff) does not need to be unique, but it does need to be more than five letters/numbers. If possible, have the Contact change their password and sign in with their new/personal (360 day) password.

  1) PowerSchool will require them to change this initial password during their first sign-in. The password restrictions are length and prior use (360 days). They cannot use a former password. Their new password needs to be more than 8 characters long, uppercase/lowercase letters and numbers. Special characters and spaces are not recommended.

2) Immediately after they confirm their new/personal password, PowerSchool will disconnect their session. They will receive an error *"There was an error processing your sign-in request. Please try again. If this problem continues, contact your school directly for assistance."* This is a security feature to validate you and your new password, in case you are interrupted.
3) Next, they will sign-in using their new/personal password even if PowerSchool stated an error from the last step.

Siblings/Cousins in the District

If the parent/guardian has more than one student in the district, they may have different accounts for each student. Here lies the username/password confusion. Multiple students can be consolidated to a single parent/guardian account. This can become complex and should be referred to the Help Desk.

As-Needed References

The Student's Parents Screen

For the purpose of these instructions, this screen is used to verify requester/contact information. Do not make changes in this screen unless you are authorized to do so.

Family Screen

Use to determine if Parent/Contact may have an Access Account for another student in the district.
The Contact's portal account (via Contact Details) may need to be updated to add another Student.

Today is: 10/15/2020   Schedule: 20-21 Regular Schedule A (A)   School: Wilbur Cross Comprehensive High School   Welcome, James M Kopcik | Help | Sign Out
Term: 20-21 Year

PowerSchool SIS

Start Page > Student Selection > Family > Manage

SwiftK12 Alerting

Portal Overview
Contact Preferences
▸ Custom Screens
▾ Information
  Access Accounts
  Addresses
  Attachments
  Contacts
  Demographics
  Emergency/Medical
  Family
  Health
  Modify Info
  Other Information
  Student Email
  Parents
  Photo
  State/Province - CT
▸ Academics
▸ Administration
▸ Enrollment
▸ Scheduling
▸ PowerTools

Students with Shared Family Information

Doe, John DEE   10   22   Wilbur Cross   Counselor: Please choose one Guidance Counselor   Group: A   SASID: 12345678

Family Members

The following students have been linked as family members and share the family information specified. To remove a student from this link select the check box next to the appropriate student(s) and submit. To copy all of the specified information from one of these students to the current student, click on the Copy From button next to the appropriate student before submitting.

Copy From:	○	○
Remove from Family	☐	☐
Student Name	,,	Doe, Juan Pablo
Student Number	92	208614
School	Saturday Academy (8)	Dr. Reginald Mayo Early Learning Center (-2)
Enroll Status	Transferred Out	Transferred Out
Family ID		
Sibling Last Name	,,	Doe
Sibling First Name		Juan
Student Phone	x	x
Physical Address	x	x
Mailing Address	x	x
Mother's Name	x	
Father's Name	x	

Net Access Screen

Provides Sign-In history, if any, for Student and Parent accounts.

PowerSchool SIS

Welcome, James M Kopcik | Help | Sign Out
Today is: 10/15/2020   School: District Office   Term: 20-21 Year

Start Page > Student Selection > Net Access

SwiftK12 Alerting

Portal Overview
Contact Preferences
▸ Custom Screens
▸ Information
▸ Academics
▾ Administration
  District Specific
  Fee Transactions
  Incidents
  Log Entries
  Lunch
  Lunch Transactions
  Net Access
  SEOP Review
▸ Enrollment

Net Access

████████ 8 ██████   Conte-West Hills   Counselor: Group: SASID: ████████

Parent Access Summary

	Parent	Date	Time	IP Address	Duration (minutes)
1.	Sm██████	10/13/2020	08:27 AM	32.212.47.225	30.97
2.	Sm██████	08/28/2020	06:27 PM	32.212.47.225	7.74

Student Access Summary

No Student Access records found.

User Login Report

Provides Sign-In history, if any, for Student and Parent accounts. Image below indicates there weren't any sign-ins within the specified date range.

1) Navigate: Start Page: Main Menu: System Reports >> Custom Reports: Security section >> User Login Report
   a) Note, the Pause box is checked while setting search parameters.
2) Enter/Select the relevant search parameters, Date Range, Login Type and Student.
   a) Keep all other parameters as shown above. After obtaining successful search results, possibly too many or seeking a specific Logout situation, you can use any of the other parameters.
3) Uncheck the Pause Box. The search may take up to 45 seconds depending on system activity.
4) Choose the output/result format:
   a) **Show/Hide Columns** – eliminate irrelevant columns
   b) **Copy, CSV, Tab or PDF**
   c) If the **Copy, CSV, Tab or PDF** buttons look like the image below and/or do not function:

   d)

   i) Right-Click a button
   ii) Adobe Flash Player
      (1) Enable Flash
      (2) Allow
      (3) May have to re-enter parameters for Login search.
      (4) Result:

Example of a User Login Report with current Sign-ins.

Contact Details Screen Segments

The Contact Details sections can be expanded or collapsed as preferred.

Other sections on the Contact Details screen are:

- Students
- Phone Numbers
- Email Addresses
- Addresses (real estate)

Note the **Active** check mark.

Contact Details: Web Account Access Section

- This screen provides the Contact with access to the student's information, grades, attendance, etc.
- In the **Contact Details Demographics** section, if the **Active** box is not checked, the contact will not be able to sign-in to the PowerSchool portal. If you're not sure why the account isn't active, consult the school's office staff or administration in case there is a reason.

- Similarly, if the **Web Account Access** is not enabled consult the school's office staff or administration in case there is a reason
- A contact needs to be both active and enabled to access the student's information.
- If the Contact doesn't have information in the **Web Account Access** (Username and Email), they will need to create a portal account. Refer to the Instructions to Create Portal Account section.
- Before changing the Contact's password, confirm the spelling of the username. You can change it in the
- Usernames can have uppercase, lowercase characters and number.
- A Contact may have more than one Web Account. They may have created one earlier in the year or a prior year and forgot they had. Or they created one for another student and didn't realize they could link all their students to their one account. This is an opportunity to disable/deactivate an obsolete account.

Contact Details   Change History

▾ Demographics

Prefix	First Name	Middle Name	Last Name	Suffix
	Eileen		▬▬▬ *	

Gender

Employer

☑ Active

▾ Web Account Access

Account Enabled	Username	Account Email
✓	We■■■	W■■■@aol.com

Edit Account

Contact Details: Students Section

▾ Students

☐ Show All (+0)   Add Students

School	Name ▲	Relationship	Custody	Lives With	School Pickup	Emerg. Contact	Original Contact Type	Start Date	End Date	Data Access	Action
Metropolitan	▬▬	SUPPORT WORKER								✓	✎ ▬
Nathan Hale	▬▬	SUPPORT WORKER								✓	✎ ▬

Contact Details: Phone Numbers Section

Contact Details: Email Addresses Section

Contact Details: Addresses Section (example - no data to list)

Instructions to Create Portal Account

If the Parent/Guardian does not have a PowerSchool web access (portal) account, depending on the circumstances, you can …

1) Provide the instructions document identified here, or
2) Use this document to assist them with creating their account, or
3) Create their account for them.

..\..\.._2.1_documentation_Beta-Release_PrePub\20-0901_for_Family_Create_ParentAccount_Sign-In.pdf

You will need to provide a current Student/Parent Portal letter.

Print Parent/Student Portal Letter for Access Credentials

End of Documentation