



**WSIPC Guide  
to Family and  
Student Access  
Administration  
and Management**

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# Contents

<b>Contents</b> .....	<b>i</b>
<b>About This Guide</b> .....	<b>1</b>
What You Should Know Before You Start .....	1
Be Sure You're Signed In.....	1
How to Use This Guide .....	2
Navigation Paths .....	2
Getting Around.....	2
Screen Shots .....	2
What's in a WSIPC Guide .....	2
What's New in This Edition .....	3
<b>Family and Student Access</b> .....	<b>4</b>
<b>Enabling and Configuring an Entity and Applications</b> .....	<b>5</b>
Enabling an Entity to use Family Access or Student Access .....	6
Configuring General Information Applications .....	7
Academic History .....	8
Activities .....	9
Attendance .....	10
Childcare .....	11
Discipline .....	12
Educational Milestones .....	13
Email Notifications .....	14
Fee Management.....	21
Food Service .....	26
Gradebook.....	32
Graduation Requirements .....	40
Homeroom .....	41
Message Center .....	42
My Calendar.....	43
Notes.....	44
Portfolio .....	44
Pseudo Changes .....	45
Report Cards .....	48
Report Directory.....	49

RTI Information.....	49
Schedule .....	49
School Directory .....	51
Skylert .....	53
Student Information.....	55
Student Services.....	57
Teacher Conferences .....	59
Test Scores.....	59
Configuring Course Requests .....	60
Alternate .....	61
Available.....	62
Selected.....	62
Update Selected.....	62
Configuring Arena Scheduling.....	64
Available Classes.....	65
Messages .....	66
Selected Classes.....	66
Submit Classes.....	67
Configuring Online Registration.....	67
Configuring Online Forms.....	73
Configuring Online Assignments.....	77
<b>Disabling an Application.....</b>	<b>78</b>
<b>Configuring District Settings.....</b>	<b>80</b>
Configuring District User Settings .....	80
Configuring District Display Settings .....	82
Configuring District Application Settings .....	88
Configuring the Family Access Login Screen .....	90
Configuring Discipline .....	91
Configuring Food Service.....	92
Configuring Fee Management .....	93
Configuring Ethnicity and Race Validation.....	93
Configuring Health Information .....	94
Configuring School Directory.....	95
Configuring Health Types.....	95
Configuring District Links.....	97
Configuring Third-Party Vendor Setup.....	99
Configuring Security .....	100
Directing Where Guardians and Students Go After Signing In .....	103
<b>Managing Permissions and Credentials .....</b>	<b>104</b>

Formatting Login Credentials for Students .....	104
Using the Preview Area .....	105
Formatting Student Logins.....	105
Formatting Login Options.....	109
Formatting Permission Options.....	109
Formatting Email Options.....	109
Formatting Student Passwords .....	111
Formatting Login Credentials for Guardians.....	111
Assigning Student Credentials Individually .....	112
Assigning Family Credentials Individually.....	114
Mass Assigning Credentials .....	116
Mass Assigning Student Credentials Using the Generate Permissions/Passwords Utility .....	116
Mass Assigning Student Credentials Using an Import File .....	119
Mass Assigning Guardian Credentials Using Generate Permissions/Passwords.....	122
Configuring the Account Information Email .....	126
Configuring Student Access Account Information Emails .....	126
Configuring Family Access Account Information Emails.....	127
<b>Running Family and Student Access Utilities.....</b>	<b>128</b>
Student Access Utilities.....	128
Mass Generate Student Permissions/Passwords.....	128
Mass Email Account Reset Link .....	128
Mass Delete Student Login History .....	129
Clone Entity Configurations .....	129
Mass Add/Remove Students to the School Directory.....	129
Family Access Utilities.....	131
Mass Generate Family Permissions/Passwords .....	131
Mass Email Account Reset Link .....	131
Mass Delete Family Login History .....	132
Clone Entity Configurations .....	132
Update Abandoned Online Payments.....	132
Mass Add/Remove Families to the School Directory .....	135
Mass Assign Email Notifications.....	137
Mass Email Verified or Unverified Accounts .....	137

# About This Guide

This Guide explains the Family and Student Access modules. It shows you how to configure and maintain Family and Student Access so that students and guardians can view and edit the information you give them access to. It also helps you manage login credentials and passwords for students and guardians.

This Guide will help anyone who configures, maintains, and supports Family and Student Access. This usually includes Service Center Coordinators and district and building contacts, but might also include secretaries and other support staff.

The first thing you'll see in this Guide is information about creating logins and passwords for students and guardians. Next, you'll learn about district and entity settings that you can use to customize Family and Student Access. Finally, the Guide explains each area of data that you can make accessible to students and guardians. For each area, you'll learn how the configuration settings affect the way data looks to students and guardians.

## What You Should Know Before You Start

If your district is implementing Family and Student Access for the first time, it helps to know what kind of information you want to share with students and guardians.

You'll find that this Guide is much more helpful if you are familiar with all of the information in the *WSIPC Guide to Skyward's School Management System*, which explains basic features of the software.

## Be Sure You're Signed In

This Guide is intended to be read while you are working in Family and Student Access, so be sure you are signed in. Many of the procedures and concepts discussed in the Guide are best understood if you practice as you read.


## How to Use This Guide

This section shows you how to follow navigation paths in a Guide, and how to navigate around the Guide using various features. This section also describes how and when screen shots are used in the Guide.

### Navigation Paths

The procedures in this Guide begin with navigation menu paths. Select the Display Navigation Menu Paths check box in User Preferences to ensure that you can follow these paths. The option is not available in User Preferences if it is already enabled for the entire district. To learn more about setting User Preferences, see the *WSIPC Guide to Skyward's School Management System*.

### Getting Around

If you're using this Guide electronically, you can click any text in blue font to move to the section of the Guide that the text refers to. Because the Guides are published in PDF format, you can also use the PDF navigation pane to quickly move from one section to another. If the pane is hidden, click the Bookmark button  in the menu bar on the left side of the screen.

### Screen Shots

You'll find screen shots throughout the guide to help you learn how to use the software. The data entered in the screen shots in this Guide is an example of the data you might enter. These screen shots are updated with each edition to make sure what you see on your screen matches what you see in the Guide. To prevent the Guide from becoming a lengthy picture book, WSIPC Guides use screen shots only to help illustrate a key idea or when options on a screen are described. This allows WSIPC Guides to be effective *and* concise.

## What's in a WSIPC Guide

WSIPC Guides are designed to provide readers with everything they need to know to safely and effectively use Skyward's software. WSIPC strives to make Guides that address the diverse needs of these audiences. Therefore, this Guide doesn't contain information customized for specific audiences, districts, or schools.

If you need to create educational materials that address the specific needs of your Service Center or district, consider using this Guide as a starting point for developing your own customized materials.

## What's New in This Edition

This section highlights the significant changes to the Guide since the last edition such as content about new features, important notes and cautions, and sections of the Guide that have been expanded or moved.

Description of Change	Page #
This Guide has been updated to reflect WSIPC's March 2015 software release version 05.15.02.00.02.	N/A
Added new section, "Configuring Invoices Using Invoice Report Ranges".	<a href="#">23</a>
Added new section, "Configuring Meal Statements Using Meal Statement Ranges".	<a href="#">29</a>
Updated "Skylert" section to remove references to older version of the software.	<a href="#">53</a>



# Family and Student Access

Family and Student Access improve communication between students, families, and the school by allowing students and guardians to access student information stored in Skyward's School Management System.

Students and guardians sign in to Family and Student Access using a secure login that the school district assigns. Each district decides what kind of data that students and guardians can view or edit.

Districts can configure Family and Student Access to allow access to any of the following information:

- Academic History
- Activities
- Attendance
- Childcare
- Discipline
- Educational Milestones
- Email Notifications
- Fee Management
- Food Service
- Grades and Gradebook
- Graduation Requirements
- Health Information
- Homeroom
- Message Center
- My Calendar
- Notes
- Portfolio
  - Attendance Letters
  - Report Cards
  - Report Directory
  - Highlights
- Pseudo Family Changes
- Report Cards
- Report Directory
- RTI Information
- Schedule
- School Directory
- Skylert
- Student Information
  - Demographics
  - Busing
  - Locker
- Student Services
- Teacher Conferences
- Test Scores
- Course Requests
- Arena Scheduling
- Edline
- Online Registration
- Online Forms
- Online Assignments

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**Note**      WSIPC does not currently support the Edline application.

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# Enabling and Configuring an Entity and Applications

You can make Family Access and Student Access available for all Entities, or for some Entities but not for others. You can also determine what information is made available for each Entity by enabling applications. An application is a specific element of Family and Student Access that you can enable and configure for guardians and students to use. Most applications allow guardians and students to view the student's information related to a specific module such as grades, attendance, and food service information.

Before guardians and students can sign in to Family Access or Student Access, you must enable the Entity and configure which applications to make available.

This section describes each of the following tasks:

- [Enabling an Entity to use Family Access or Student Access](#)
- [Configuring General Information Applications](#)
- [Configuring Course Requests](#)
- [Configuring Arena Scheduling](#)
- [Configuring Online Registration](#)
- [Configuring Online Forms](#)
- [Configuring Online Assignments](#)

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<b>Note</b>	To learn how each application functions from the guardian's and student's point of view, see the <i>WSIPC Guide to Family and Student Access for Students and Guardians</i> .
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## Enabling an Entity to use Family Access or Student Access

Once you have determined that an Entity will use Family Access or Student Access, you must enable it at the Entity level.

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**Note** Entity Configuration is available at all Entities except Entity 000.

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To enable an Entity to use Family Access or Student Access:

1. Do one of the following:
  - Go to Student Management\Families\FM Setup\CF\EC.
  - Go to Student Management\Students\SA Setup\CF\EC.

---

**Note** You can enable both Family and Student Access from either Student Access or Family Access.

---

2. Select an Entity and click Edit on the right side of the screen.
3. Clear the Turn Off Family Access or Turn Off Student Access check box to enable Family or Student Access.
4. To temporarily disable Family Access or Student Access, enter a date in Date to Turn Back On.

---

**Note** The application is automatically turned back on as of the date entered. If a date is not entered, the application remains turned off until the district either clears the option Turn Off Family Access or Turn Off Student Access, or enters a date for it to be turned back on.

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**Note** You can enter information into the Message box to display a message that lets guardians and students know why Family Access or Student Access is turned off.

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5. Click Save.

## Configuring General Information Applications

When an Entity is enabled to use Family Access or Student Access, you must configure the applications you want to make available to guardians and students. Once you enable an application, you can configure it so that users see only the information and features that you want them to see. There are many applications available for use in Family Access or Student Access. Some of these applications include Attendance, Gradebook, Report Cards, and Teacher Conferences.

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<b>Note</b>	Each configuration screen is divided into two areas, with Guardian Options on the left and Student Options on the right. Configuring options in each area affects either guardian users or student users. Unless otherwise specified, options are the same across both areas. However, options that are only available for one type of user are noted as such.
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Unless otherwise specified, use the procedure below to enable and configure each application. To disable an application, see [“Disabling an Application”](#) (page 78).

To configure a General Information application:

1. Do one of the following:
  - Go to Student Management\Families\FM Setup\CF\EC.
  - Go to Student Management\Students\SA Setup\CF\EC.

---

<b>Note</b>	Both Family Access and Student Access options can be enabled from either location.
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2. Expand General Information.
3. Click Edit next to the application you want to configure.
4. Clear the Disable Application check box to enable the application in the Guardian Options area and/or the Student Options area.

- Configure the Configuration screen for the selected application. For detailed information about each application, see the appropriate section below.
- If desired, select Display Staff Email Address or Display Entity Contact For this Application. These options are available for most applications.

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**Note** The Display Entity Contact For this Application option is only available to students because Contact Us is always visible for Guardians in Family Access and includes all Entity Contacts if an Entity Contact for the area is defined. Entity Contacts are configured in Student Management\Advanced Features\SC.

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- Click Save.

## Academic History

The Academic History (Figure 1) application shows a student's Grade History in Family and Student Access. Table 1 describes the two options for the Academic History application.

**Figure 1 - Academic History Entity Configuration screen**

Guardian/Student Option	Description
Display Next Year Classes	Shows a student's scheduled classes for the next school year in Academic History.
Display Classes from all Entities in Family Access/ Student Access	Shows a student's classes from all Entities. This is useful in viewing a student's Academic History across the entire district.

**Table 1 - Description of the Academic History Entity Configuration options**

## Activities

The Activities application shows a student’s Activities. There are three options on the Activities Entity Configuration screen (Figure 2). Table 2 describes each option.

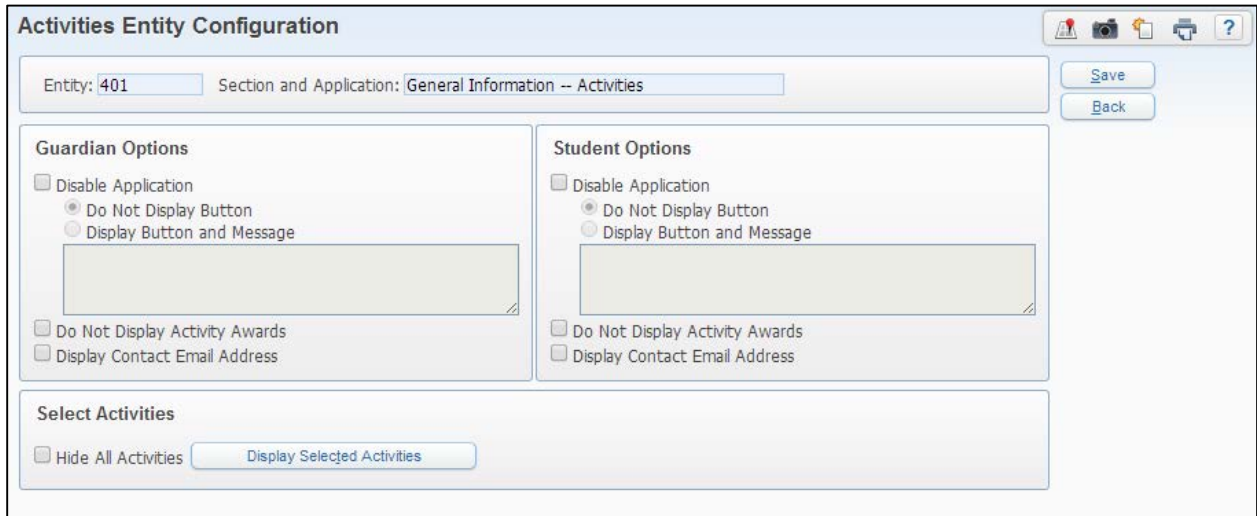


Figure 2 - Activities Entity Configuration screen

Option	Description
Do Not Display Activity Awards	Prevents individual student awards from being displayed.
Display Contact Email Address	Controls whether the Activity Leader’s name is displayed as a hyperlink to their email address.
Display Selected Activities	Specifies which Activities appear. To suppress all Activities without disabling the application, select the Hide All Activities check box.

Table 2 - Description of the Activities Entity Configuration options

## Attendance

The Attendance application shows a student’s tardies and absences in a calendar format and in a list format, and shows the student’s Term Attendance Totals. You can also configure the Attendance application to allow guardians to submit absence notifications to the school. Figure 3 shows the Attendance Entity Configuration screen. Table 3 describes the options on this screen.

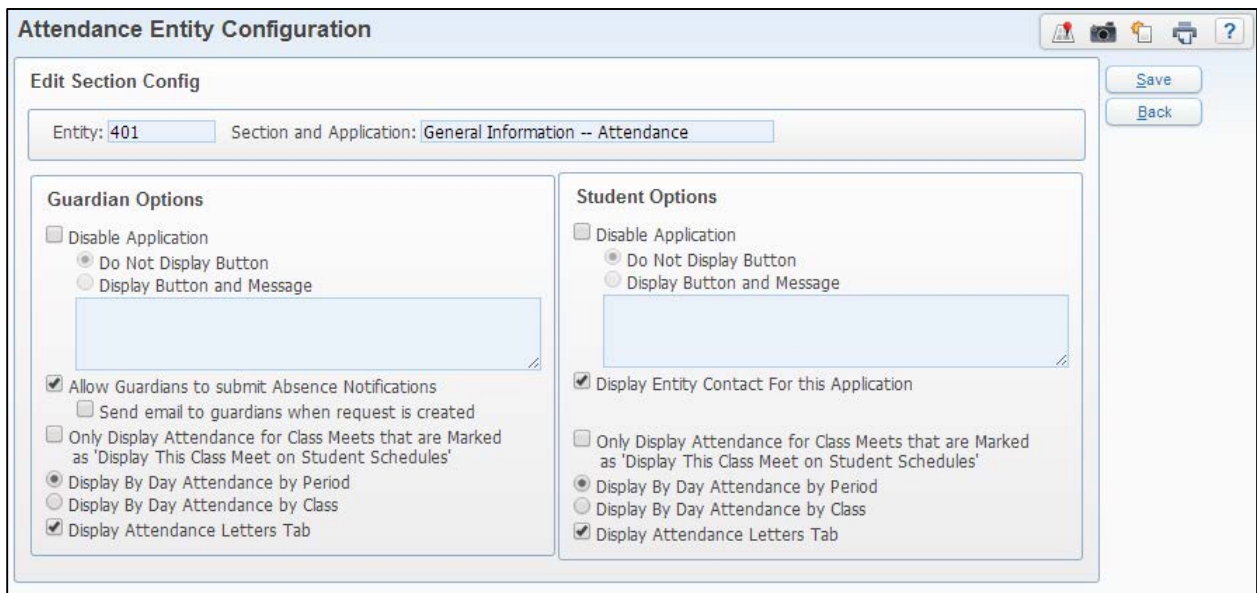


Figure 3 - Attendance Entity Configuration screen

Option	Description
Allow Guardians to submit Absence Notifications	Controls whether guardians can submit electronic absence notifications to the school. This option is only available to Guardians.
Send email to guardians when request is created	This option is only available when Allow Guardians to submit Absence Notifications is enabled. It controls whether a confirmation email is sent to the Guardian when an Absence Notification is submitted via Family Access. To learn more about configuring email notifications see “ <a href="#">Configuring the Account Information Email</a> ” (page 126).

Option	Description
Display Entity Contact For this Application	Enables the Attendance contact to appear in Contact Us in Student Access for students to communicate with the school's designated Attendance staff.
Only Display Attendance for Class Meets that are Marked as 'Display This Class Meet on Student Schedules'	Allows attendance for a class to appear. Based on the Display This Class Meet on Student Schedules option in Current Scheduling (Student Management\Office\CS\BC\CM\Course\Section Details\Section\Edit Meeting Pattern).
Display By Day Attendance by Period	Period attendance information appears on the By Date tab.
Display By Day Attendance by Class	Class attendance information appears on the By Date tab. This option includes class information such as the Course Code and Course Description.
Display Attendance Letters Tab	Controls whether the Attendance Letters tab appears in the Attendance Application in Family Access or Student Access.

Table 3 - Description of the Attendance Entity Configuration options

## Childcare

The Childcare application displays a student's Fixed and Flexible Childcare Programs. Guardians can also add, change, and remove attendance dates in a Flexible Childcare Program. There are no options for this application, and it's only available to guardians. To learn more about Childcare Programs or the Childcare module, see the *WSIPC Guide to Childcare*.

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<b>Note</b>	For Childcare to appear in Family Access, your district must be using the Fee Management Module.
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## Discipline

The Discipline application displays a student’s discipline records. This includes all Referrals, Offences and Action details. Figure 4 shows the Discipline Entity Configuration screen. Table 4 describes the available Wall Message options.

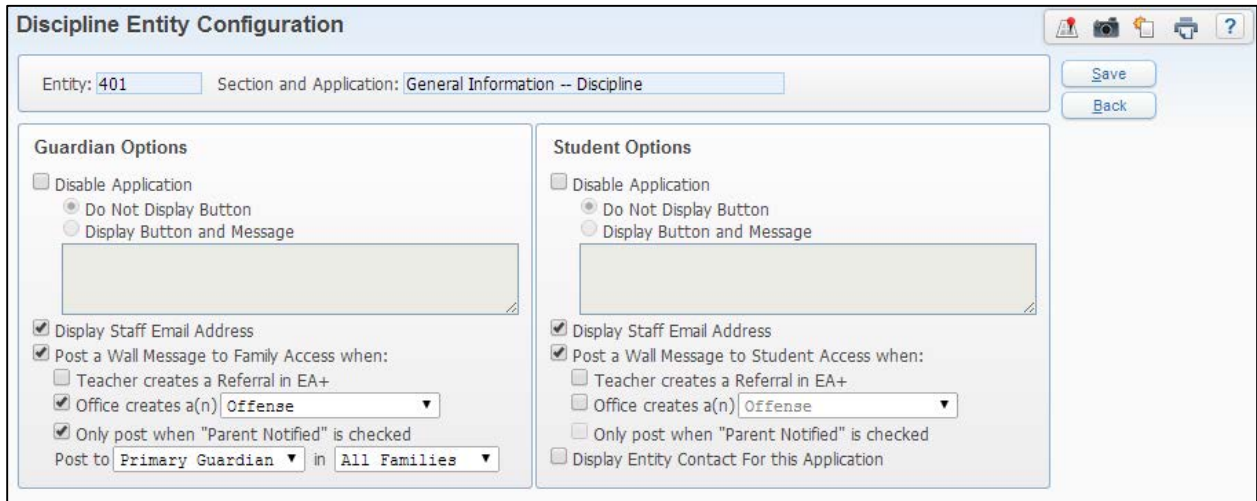


Figure 4 - Discipline Entity Configuration screen

Option	Description
Display Staff Email Address	Allows the Entity to determine if the staff email address link displays.
Post a Wall Message to Family Access when:	Allows the Entity to determine when a message is posted to the Family or Student Access Wall.
Teacher creates a Referral in EA+	A Wall Message is posted when a teacher creates a Discipline Referral through EA+.
Office creates a(n) [Referral, Offense, Both]	Allows the Entity to decide if a Wall Message will be posted when the Office creates a Referral, an Offense, or both.
Only post when “Parent Notified” is checked	Allows a Wall Message to post only when Parent Notified is selected on the Referral or Offense.
Post to [XX] in [XX]	Determines whether a Discipline Wall Message is posted to the Primary Guardian or All Guardians in the First Family or All Families. This option is available for Family Access only.

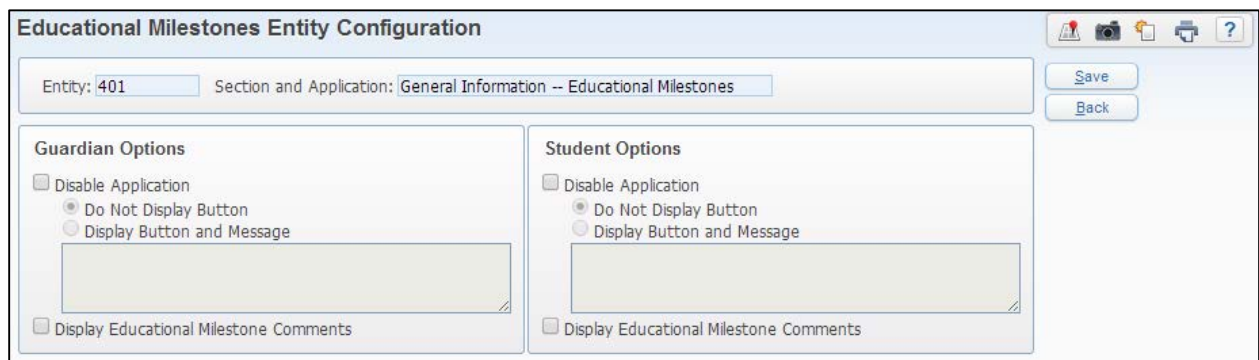
Option	Description
Display Entity Contact For this Application	Enables the Discipline contact to appear in Contact Us in Student Access for students to communicate with the school’s designated Discipline staff.

**Table 4 - Description of the Discipline Entity Configuration screen Wall Message options**

There are also several district-specific options that do not appear on the Discipline Entity Configuration screen. These options affect all users in all Entities. To learn more about district-specific options, see “[Configuring District Application Settings](#)” (page 88).

## Educational Milestones

The Educational Milestones application shows a student’s assigned and completed Educational Milestones. There is one option for this application. Figure 5 shows the Educational Milestone Entity Configuration screen. Table 5 describes the option on this screen.



**Figure 5 - Educational Milestones Entity Configuration screen**

Option	Description
Display Educational Milestone Comments	Shows comments for each Educational Milestone.

**Table 5 - Description of Educational Milestones Entity Configuration option**

Each Educational Milestone can be shown or hidden in Family and Student Access.

To determine which Educational Milestones will display in Family and Student Access:

1. Go to Student Management\Office\CA\EM Setup\CO\EM.
2. Select an Educational Milestone and click Edit.
3. Select or clear Display this Milestone in Family Access.
4. Click Save.

## Email Notifications

The Email Notifications application allows guardians to subscribe to email notifications for different modules. The Email Notification application is only available to guardians. Figure 6 shows the Email Notifications Entity Configuration screen with the following three Entity-defined email notifications that you can make available to guardians:

- [Attendance Email Notifications](#)
- [Grading Email Notifications](#)
- [Progress Report Emails](#)

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<b>Note</b>	You can also send email notifications to guardians when a student's Food Service balance falls below a specified amount. To learn more about this, see " <a href="#">Configuring District User Settings</a> " (page 80).
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**Email Notifications Entity Configuration**

Entity: 401    Section and Application: General Information -- Email Notifications

**Guardian Options**

- Disable Application
  - Do Not Display Button
  - Display Button and Message
- Allow Guardians to Subscribe to Attendance E-mail Notifications
- Do not Send Grading E-mail Notifications or Progress Report E-mails for Certain Grade Levels
- Allow Guardians to Subscribe to Grading E-mail Notifications
  - Send E-mails Daily
  - Send E-mails Weekly
- Include List of Missing Assignments
  - Display List based on Missing Assignment Common Options in Family Access Gradebook Entity Configuration
- Include List of Assignments/Classes below: 60.00 percent
- Include List of Assignments/Classes above: 90.00 percent
- NOTE: The Default High and Low Assignment/Class percents can be overridden by the Primary Guardian in Family Access
- Include Grade Mark changes for a Past Term
- Allow Guardians to Subscribe to Progress Report E-mails
  - Include attendance in Progress Report E-mails
- NOTE: The Guardian will be allowed to choose to receive this e-mail daily, weekly, or monthly

Figure 6 - E-mail Notifications Entity Configuration screen

### Attendance Email Notifications

The option, Allow Guardians to Subscribe to Attendance Email Notifications, allows guardians who subscribe to Attendance Email Notifications to receive an email when their student has any attendance record entered for that day. By default, the email is sent at 4:00 p.m. daily, although you can change the time of day that the email is sent. You can also modify the Subject line and Body of the email.

### ***Changing the Time Attendance Email Notifications Are Generated***

You can change the time when the system generates Attendance Email Notifications.

To change the time Attendance Email Notifications are generated:

1. Go to Product Setup\System Administration\PQ\ST.
2. Select the Automated Email named “End of the Day Attendance Summary Email to Family Subscriber List” and click Edit.
3. In the Task Information area, enter the new Start Time.
4. Click Save.

### ***Changing the Subject and Body of Attendance Email Notifications***

You can change the text of the subject and/or the body of Attendance Email Notifications.

To change the Subject and Body of the Attendance Notification email:

1. Go to Student Management\Advanced Features\AF\AE.
2. Select the Automated Email named “Family Access Notifications – Any Attendance Entered for Today” and click Edit.
3. In the Message Composition area, update the text of the Subject or Body.
4. Click Save.

### **Grading Email Notifications**

The option, Allow Guardians to Subscribe to Grading Email Notifications, allows guardians to subscribe to Grading Email Notifications. Table 6 describes the available Grading Email Notification options. Email notifications can be sent daily or weekly.

Option	Description
Do not Send Grading E-mail Notifications or Progress Report E-mails for Certain Grade Levels	Click the Grade Levels link to select grade levels to be excluded from grading or progress report email notifications.
Send Emails Daily	Generates Grading Email Notifications every day.
Send Emails Weekly	<p>Generates Grading Email Notifications once a week.</p> <p><b>Note:</b> By default, weekly notifications are generated on Saturday. To learn how to change the day the email is generated, see <a href="#">“Changing the Time and/or Day Grading Email Notifications Are Generated”</a> immediately below this table.</p>
Include List of Missing Assignments	Determines whether a Missing Assignment or Event triggers an Email Notification to be generated for a student.
Display List based on Missing Assignment Common Options in Family Access Gradebook Entity Configuration	<p>Determines when missing assignments are displayed.</p> <p>For example, will an assignment display as missing based on the due date, or will it be suppressed for a defined number of days past the due date as defined in the Common Options area of the Gradebook Entity Configuration screen?</p> <p>Available only when Include Lists of Missing Assignments is selected.</p>
Include List of Assignments/Classes below: [XX] percent	Determines whether an Assignment or Event that received a grade below the designated percentage triggers an Email Notification to be generated for a student. A Primary Guardian can change this percentage when he/she subscribes to the Grading Email Notification.

Option	Description
Include List of Assignments/Classes above: [XX] percent	Determines whether an Assignment or Event that received a grade above the designated percentage triggers an Email Notification to be generated for a student. A Primary Guardian can change this percentage when he/she subscribes to the Grading Email Notification.
Include Grade Mark changes for a Past Term	Determines whether a change in Grade Mark for a previous Term or Semester grade triggers an Email Notification for a student.

**Table 6 - Description of Grading Email Notification options**

### ***Changing the Time and/or Day Grading Email Notifications Are Generated***

Grading email notifications can be sent out daily or weekly, but not both. You can change the time and/or day when the system generates the Grading Email Notifications.

To change the time and/or day Grading Email Notifications are generated:

1. Go to Product Setup\System Administration\PQ\ST.
2. Select the Grading Notification E-mail to Family subscribers List and click Edit.
3. In the Task Information area, enter the new Start Time.

4. In the Day(s) of the week area, select the check box to the left of the day(s) you want the notifications generated.

---

<b>Note</b>	If you allow guardians to receive daily Grading Email notifications, you should select each weekday. If you allow guardians to receive weekly notifications, select the check box for the day you want the emails generated. When multiple days of the week are selected, the weekly notifications will be generated on the last day selected.
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5. Click Save.

### ***Changing the Subject and Body of Grading Email Notifications***

You can change the text of the subject and the body of Grading Email Notifications.

To change the subject and body of the Grading Email Notifications:

1. Go to Student Management\Advanced Features\AF\AE.
2. Select the Automated Email named “Family Access Notifications – Weekly Grading Notification” and click Edit.

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<b>Note</b>	The Auto Email is named Weekly Grading Notification even if you have configured it to be generated daily.
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3. In the Message Composition area, update the text of the Subject or Body.
4. Click Save.



### Progress Report Emails

The option Allow Guardians to Subscribe to Progress Report Emails allows guardians to subscribe to Progress Report Emails. A guardian who subscribes to the Progress Report Emails receives a grade report for all classes. A guardian can also determine whether to receive the Progress Report daily, once a week, or once a month. Table 7 describes the one Progress Report Email option.

---

<b>Note</b>	By default, the email notifications for weekly progress reports are generated on Saturday and the email notifications for monthly progress reports are generated on the first day of the month. To learn how to change the time and /or day Progress Report emails are generated, see “ <a href="#">Changing the Time and/or Day Progress Report Emails Are Generated.</a> ”
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Option	Description
Include attendance in Progress Report Emails	Controls whether Attendance information is included in the Progress Report Email.

Table 7 - Description of the Progress Report Email option

### ***Changing the Time and/or Day Progress Report Emails Are Generated***

You can change the time when the system generates Progress Report emails.

To change the time and/or day Progress Report emails are generated:

1. Go to Product Setup\System Administration\PQ\ST.
2. Select the Progress Report Notification Email to Family Subscriber List and click Edit.
3. In the Task Information area, enter the new Start Time.

4. In the Day(s) of the week area, select the check box to the left of the day(s) you want the notifications generated.

---

<b>Note</b>	Guardians can choose to receive a Progress Report notification daily, weekly or monthly. Therefore, you should select each weekday that the daily notification will be generated. When multiple days of the week are selected, the weekly notifications are generated on the last day selected.
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5. Click Save.

### ***Changing the Subject and Body of Progress Report Emails***

You can change the text of the subject and the body of the Progress Report emails.

To change the subject and body of Progress Report emails:

1. Go to Student Management\Advanced Features\AF\AE.
2. Select the Automated Email named “Family Access Notifications – Daily Progress Reports” and click Edit.
3. In the Message Composition area, update the text of the Subject or Body.
4. Click Save.

## **Fee Management**

The Fee Management application shows a student’s charges and payments. Your district can also configure Fee Management to accept online payments using a credit card through a third-party vendor. Figure 7 shows the Fee Management Entity Configuration screen. The options described in Table 8 are available only when acceptance of online payments is enabled. To learn how to enable online payments, see the *WSIPC Guide to Fee Management*.

---

<b>Note</b>	There are also several district-specific Fee Management options. These options affect all users in all Entities. To learn more about these district-specific options, see “ <a href="#">Configuring District Application Settings</a> ” (page 88).
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The screenshot shows the 'Fee Management Entity Configuration' window. At the top, it displays 'Entity: 401' and 'Section and Application: General Information -- Fee Management'. There are 'Save' and 'Back' buttons. The main area is divided into three sections:

- Guardian Options:** Includes a 'Disable Application' checkbox and two radio buttons: 'Do Not Display Button' (selected) and 'Display Button and Message'. There is an empty text box below.
- Student Options:** Includes a 'Disable Application' checkbox and two radio buttons: 'Do Not Display Button' (selected) and 'Display Button and Message'. There is an empty text box below.
- Family Access Payment Options:** A note states: 'This section only applies when the Original or Single Point of Entry online payment interfaces are in use. This district currently uses neither of these interfaces so it is not necessary to fill out these fields.' It contains:
  - 'Current Year Payment Code: PAYONLIN' (dropdown) and 'Online Credit Card Payment' (checkbox).
  - 'Next Year Payment Code: ' (dropdown).
  - 'Childcare Payment Code: ' (dropdown).
  - 'Minimum Payment Amount: 0.00' (text input).
  - 'Do Not Allow Payor to choose Payment Amount' (checkbox).

At the bottom, there is a 'Family Access Invoice Report Ranges' section with an 'Add' button and a table with columns 'Report Name' and 'Enabled?'. The table is currently empty, showing 'No records available' and '0 records displayed'.

Figure 7 – Family Access Payment options on the Fee Management Entity Configuration screen

Option	Description
Current Year Payment Code	Payment Bill Code from the Current Year to be used on the online payment record.
Next Year Payment Code	Payment Bill Code from the Next Year to be used on the online payment record.
Childcare Payment Code	Payment Bill Code from Childcare to be used on the online payment record.
Minimum Payment Amount	Minimum amount of a payment made through online payments.
Do Not Allow Payor to choose Payment Amount	Prevents Payor from determining how much of a payment to make. If selected, online payments must be for the full amount due.

Table 8 - Description of Fee Management Entity Configuration options

### **Configuring Invoices Using Invoice Report Ranges**

You can also configure one or more Invoices to be displayed in Family Access. Guardians can view and print an Invoice according to the criteria that you have specified.

To configure Invoices using Invoice Report Ranges:

1. Go to Student Management\Families\FM Setup\CF\EC.
2. Expand the General Information area and click Edit to the left of Fee Management.
3. In the Family Access Invoice Report Ranges area, click Add.
4. Enter the desired ranges for the Invoice (Figure 8). Table 9 describes the options in the Family Access Invoice Report Ranges area.
5. Click Save.

**Figure 8 - The Family Access Invoice Report Ranges screen**

Option	Description
Report is Enabled in Family Access?	This option must be selected to make the Invoice available for Guardians to run from Family Access.
Filter fees by school year	If not selected, the Invoice will show fees for any school year as long as the effective date falls within the Date Entered ranges.
Default Entity	Filters students by their Default Entity. Students without a qualifying Default Entity will also be filtered by Student Status.
Allow Parents to select the Date Entered Ranges for the report	If selected, when a Guardian runs an Invoice they are prompted to enter a date range. If not selected, the Invoice can only run according to the date range you specify.

Option	Description
Date Entered	Defaults to the start and end dates of the current calendar year.
Total Balance Due	Specifies a range for balances to be included.
Student Status	Selects whether Active or Inactive students should be included, or both.
General/Activity/Course Charges Only	Allows you to select which charges to include on the Invoice.
Name Order	Determines how the Payor's name is printed on the Invoice.
Print the District Tax ID	Includes the District's Tax ID on the Invoice.
Print Middle Initial	Includes the Payor's middle initial on the Invoice.
Print Billing Detail Type Totals	Includes totals for each Billing Detail Type on the Invoice.
Payor Mailing Address Starting Location	Specifies the Row and Column in which the Payor Mailing Address should begin.
Headers	Allows you to create a customized heading for the Invoice.
Footers	Allows you to create a customized footer for the Invoice.

**Table 9 – The configurations options available for Family Access Invoice Report Ranges**

### Food Service

The Food Service application shows a student's Food Service purchases, payments, and other account information. The Food Service application can also be configured to allow guardians to enter Online Applications for Free or Reduced-Price Meals, and accept online payments using a credit card through a third-party vendor. To learn how to enable online payments, see the *WSIPC Guide to Fee Management*.

The options on the Food Service Entity Configuration screen (Figure 9) must be configured for each Entity that uses Food Service in Family Access. Table 10 describes each option on this screen. To learn more about district-wide options for Food Service, see "[Configuring District Application Settings](#)" (page 88).

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<b>Note</b>	Several options are district-specific. These options affect all users in all Entities. To learn more about these district-specific options, see " <a href="#">Configuring District Application Settings</a> " (page 88).
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### Food Service Entity Configuration

Entity: 
Section and Application:

#### Guardian Options

Disable Application

Do Not Display Button

Display Button and Message

Display Message on Account Information screen

Enter a free form Message for Food Service:

New for school year 2015! Families may apply for Free and Reduced Meal Benefits online. Simply click on the Applications tab above and follow the simple instructions provided on the

Display URL on Account Information screen

URL:

Link Text:

Enter a free form URL Message:

Click the Lunch Menu link below to view/print the monthly menu.

Do not show "Today's Lunch Menu" section in Family Access

Redirect the "Lunch Calendar" link to another lunch menu (default is the District Event Calendar)

Lunch Calendar URL:

Do Not Accept Online Food Service Applications

Always Accept Online Applications

Select Date Ranges for Application Acceptance

Start Application Acceptance on

End Application Acceptance on

#### Student Options

Disable Application

Do Not Display Button

Display Button and Message

Display Message on Account Information screen

Enter a free form Message for Food Service:

Display URL on Account Information screen

URL:

Link Text:

Enter a free form URL Message:

Click the Lunch Menu link below to view/print the monthly menu.

Do not show "Today's Lunch Menu" section in Student Access

Redirect the "Lunch Calendar" link to another lunch menu (default is the District Event Calendar)

Lunch Calendar URL:

Display Entity Contact For this Application

#### Family Access Payment Options

Minimum Payment Amount:

#### Family Access Meal Statement Ranges

Report Name	Enabled?
Meal Statements	Y

1 records displayed

**Figure 9 - Food Service Entity Configuration screen showing options related to Online Applications**



Option	Description
Display Message on Account Information screen	Shows a free-form message in the Food Service Messages/Links section of the Food Service application. When selected, the Enter a free form URL Message for Food Service box is available and allows you to type a message. For example, the message might explain when the Food Service options will be available in Family Access.
Display URL on Account Information screen	Shows a hyperlink in the Food Service Messages/Links section that allows students and parents to access district and school information. When selected, the URL, Linked Text and free form URL Message boxes are available.
Do not show “Today’s Lunch Menu” section in Family Access	Removes the “Today’s Lunch Menu” section from the Food Service tab. Removing this section also removes the hyperlink to the Lunch Calendar.
Redirect the “Lunch Calendar” link to another lunch menu (default is the District Event Calendar)	Displays the provided link in addition to the default District Event Calendar for viewing Lunch Menus using the Lunch Calendar link. When selected, the Lunch Calendar URL box is available.
Display Entity Contact For this Application	Enables the Food Service contact to appear in Contact Us in Student Access for students to communicate with the school’s designated Food Service staff.
Do Not Accept Online Food Service Applications	Default option for Online Applications in the Entity Configuration. When selected, guardians cannot enter Online Food Service Applications. However, the Submit a Food Service Application option may still be available and the guardian may be able to view applications depending on the Additional Options settings.

Option	Description
Always Accept Online Applications	Enables the Applications link for entry of Online Applications for Free or Reduced-Price Meals without any date restrictions.
Select Date Ranges for Application Acceptance	Enables the Applications link for entry of Online Applications for Free or Reduced-Price Meals during the entered date ranges. When selected, the Start Application Acceptance on and End Application Acceptance on date boxes appear and must be filled in.
Additional Options	Options that must be configured before guardians can view, update, or enter Online Applications. To learn how to set up the Additional Options, see “Food Service Setup” in the <i>WSIPC Guide to Food Service Administration and Management</i> .
Minimum Payment Amount:	Allows you to set a minimum amount for online payments to Food Service accounts that are made through Family Access.

**Table 10- Description of Food Service Entity Configuration options**

### Configuring Meal Statements Using Meal Statement Ranges

You can also configure one or more Meal Statements to be displayed in Family Access. Guardians can view and print a Meal Statement according to the criteria that you have specified.

To add a Meal Statement Range:

1. Go to Student Management\Families\FM Setup\CF\EC.
2. Expand the General Information area and click Edit to the left of Food Service.
3. In the Family Access Meal Statement Ranges area, click Add.

4. Enter the desired ranges for the Meal Statement (Figure 10). Table 11 describes the options in the Family Access Meal Statement Ranges area.
5. Click Save.

**Figure 10 - The Family Access Meal Statement Ranges screen**

Option	Description
Report is Enabled in Family Access?	This option must be selected to make the Meal Statement available for Guardians to run from Family Access.
Allow Parents to select the Statement Date Ranges for the report	If selected, when Guardians run Meal Statements, they are prompted to enter a date range. If not selected, the Meal Statement can only run according to the date range you specify.
Statement Date	The Low and High dates for which the statement is run.
Exclude Zero Priced Items	Excludes items from printing on the statement that do not have a cost associated with them, such as a Breakfast that is Free.
Summarized Statement	Prints a summarized statement. Summarized statements print account balances only, and do not print the Customer's daily purchase and payment activity.
Statement Sequence	The order in which you want the Meal Statement to print.

Option	Description
Name Order	Determines how the Payor's name is printed on the Meal Statement.
All Purchases for Customer	Includes all purchases on the report. Select Yes to include all purchases, even those made under a different Payor than the current Payor.
Sales Totals as Negative	Print the total amount of sales on the Meal Statement as a negative number.
Payor Phone Number	Prints Payor phone number.
Confidential Phone	Prints Payor phone number, if it is marked as Confidential.
Print Payment Notes	Prints any Payment Notes that may exist for payments within the date range specified on the Meal Statement.
Print Letter Heading	Allows you to create a customized heading for the Meal Statement.
Comment	Option to enter up to 10 lines of comments that appear at the bottom of the Meal Statements.

**Table 11 – The configuration options available for Family Access Meal Statement Ranges**

### Gradebook

The Gradebook application shows a student's current year Gradebook data for all classes. It is compatible with both Secondary and Standards Gradebooks and can show the following type of grades:

- Midterm
- Term
- Semester
- Final
- Semester Exam
- Final Exam
- Citizenship
- Athletic
- Assignment
- Event
- Skill
- Subject

The Gradebook application can also show the student's missing assignments, GPA, Comments, and entries in the Teacher's Log.

Figure 11 shows the Gradebook Entity Configuration screen. Table 12 describes the options on this screen.

### Gradebook Entity Configuration

Entity: 
Section and Application:

**Common Options**

Do not display Assignments as missing based on due date  
 Do not display Assignments as missing until:  days past the due date.

Post a Wall Message to Family/Student Access when Gradebook Grades are Posted  
Note: This only applies to Secondary Gradebooks and Standard Gradebooks that are calculating Term grades

**Guardian Options**

Disable Application  
 Do Not Display Button  
 Display Button and Message

Do not show Gradebook for Certain **Grade Levels**

Display GPA [GPA Types](#)  
 Display Class Rank  
 Display GPA Value Used In The Last Ranking  
 Display Current Year GPA Only  
 Display Staff Email Address  
 Display message on Grading screen

Do not display Dropped Classes  
 Show Grade Bucket Descriptions on mouse-over of Column Headings  
 Display Skyward Gradebook Grades  
 Do not show Grade Adjustments  
 Do not show Assignment/Event Detail  
 Do not show Subject/Skill Detail  
 Do not show the Gradebook's Final Grade, only show Posted Final Grade  
 Do not show percent when using proficiency-based scoring on Benchmarks [?](#)  
 Post Gradebook assignment comments  
 Show Progress Report icon on Gradebook Display instead of calculated grade  
 Display Link to view Grade Marks on Progress Detail popup  
 Display Grade Marks on Class Progress Detail popup  
 Display % Earned in Subjects, Skills, and Events for Standards Gradebooks  
 Show midterm grades for Gradebook classes  
 Only show Posted grades  
 Always Display Assignments/Events Based on Control Set Dates [?](#)  
 Show Class Assignment/Event High/Low Scores on Assignment/Event Popup  
 Show Class Assignment/Event Average Score on Assignment/Event Popup  
 Show Class Assignment/Event Median Score on Assignment/Event Popup  
 Display Popup Message Before Displaying Assignment/Event Detail Popup

Show a Posted Grade before the end of the posting period  
 Do not show Posted Grades until  days past the posting window end date  
 Do not show Posted Subject/Skill Grades until  days past the  end date  
 Do not display Athletic Grade Bucket  
 Do not show both Secondary and Standards Gradebooks  
 Do not show Standards Gradebook  
 Do not show Secondary Gradebook

Default display for all non-Standards Courses:  Expanded  Collapsed  
 Default display for all Standards Courses:  Expanded  Collapsed  
 Default display for all Subjects:  Expanded  Collapsed  
 Default display for all Skills:  Expanded  Collapsed

**Student Options**

Disable Application  
 Do Not Display Button  
 Display Button and Message

Do not show Gradebook for Certain **Grade Levels**

Display GPA [GPA Types](#)  
 Display Class Rank  
 Display GPA Value Used In The Last Ranking  
 Display Current Year GPA Only  
 Display Staff Email Address  
 Display message on Grading screen

Do not display Dropped Classes  
 Show Grade Bucket Descriptions on mouse-over of Column Headings  
 Display Skyward Gradebook Grades  
 Do not show Grade Adjustments  
 Do not show Assignment/Event Detail  
 Do not show Subject/Skill Detail  
 Do not show the Gradebook's Final Grade, only show Posted Final Grade  
 Do not show percent when using proficiency-based scoring on Benchmarks [?](#)  
 Post Gradebook assignment comments  
 Show Progress Report icon on Gradebook Display instead of calculated grade  
 Display Link to view Grade Marks on Progress Detail popup  
 Display Grade Marks on Class Progress Detail popup  
 Display % Earned in Subjects, Skills, and Events for Standards Gradebooks  
 Show midterm grades for Gradebook classes  
 Only show Posted grades  
 Always Display Assignments/Events Based on Control Set Dates [?](#)  
 Show Class Assignment/Event High/Low Scores on Assignment/Event Popup  
 Show Class Assignment/Event Average Score on Assignment/Event Popup  
 Show Class Assignment/Event Median Score on Assignment/Event Popup  
 Display Popup Message Before Displaying Assignment/Event Detail Popup

Show a Posted Grade before the end of the posting period  
 Do not show Posted Grades until  days past the posting window end date  
 Do not show Posted Subject/Skill Grades until  days past the  end date  
 Do not display Athletic Grade Bucket  
 Do not show both Secondary and Standards Gradebooks  
 Do not show Standards Gradebook  
 Do not show Secondary Gradebook

Default display for all non-Standards Courses:  Expanded  Collapsed  
 Default display for all Standards Courses:  Expanded  Collapsed  
 Default display for all Subjects:  Expanded  Collapsed  
 Default display for all Skills:  Expanded  Collapsed

Display Entity Contact For this Application


Figure 11 - Gradebook Entity Configuration screen

AREA	PURPOSE OF AREA
Common Options	Determines when assignments and wall messages display.
Options in This Area	Description of Options
Do not display Assignments as missing based on due date	Prevents assignments from appearing in the Missing Assignments tab if the current date is past the due date, even if no grade is given.
Do not display Assignments as missing until XX days past the due date	<p>Prevents assignments from appearing in the Missing Assignments tab until a specified number of days after the due date of an Event, if no Grade is given. This allows time for teachers to grade the assignments and enter the grade into Gradebook. This option is not available if you select Do not display Assignments as missing based on due date.</p> <p>For example, if the setting is three days and an assignment is due on Monday, but the assignment is not scored by the teacher, it does not show as missing in Family and Student Access until Thursday.</p>
Post a Wall Message to the Family/Student Access when Gradebook Grades are Posted	<p>Allows a message to post to the Family/Student Access wall when Gradebook Grades are Posted.</p> <p><b>Note:</b> This only applies to Secondary Gradebooks and Standard Gradebooks that are calculating Term Grades.</p>

AREA	PURPOSE OF AREA
Guardian Options and Student Options	Determines which options are available in Family and Student Access.
Options in this Area	Description of Options
Do not show Gradebook for Certain Grade Levels	Hides Gradebook data for specific Grade levels. You can select the Grade levels to hide Gradebook data for by clicking the Grade Levels link.
Display GPA	Shows the student's current-year GPA. If selected, click GPA Types to select which GPA type(s) to show.
Display Class Rank	Shows the student's Class Rank. This option is only available when Display GPA is enabled.
Display GPA Value Used In The Last Ranking	Shows the student's GPA that was used to calculate the last ranking instead of the student's current GPA. This option is only available when Display GPA is enabled.
Display Current Year GPA Only	Shows the student's Current Year GPA(s) only.
Display Staff Email Address	Shows staff names as hyperlinks to their email addresses.
Display message on Grading screen	Shows message on the Gradebook display. You can type the message in the box below the option.
Do not display Dropped Classes	Prevents dropped Classes from appearing. If not selected, dropped Classes display with a red downward arrow.
Show Grade Bucket Descriptions on mouse-over of Column Headings	Displays a description of the Grade Bucket when you pause your mouse pointer over the column headings.



Options in this Area	Description of Options
Display Skyward Gradebook Grades	Shows Assignment Grades from the Secondary Gradebook. If not selected, only posted Term, Semester, and Final Class Grades display after the end of the corresponding Grading Period. All options that appear indented below this option on the Gradebook Entity Configuration screen are only available if you select this option.
Do not show Grade Adjustments	Prevents grade adjustment information from appearing.
Do not show Assignment/Event Detail	Prevents detailed assignment information from appearing.
Do not show Subject/Skill Detail	Hides Subject/Skill Detail when selecting the Progress Detail icon.  <b>Note:</b> Only Entities that use the Standards Gradebook use this option.
Do not show the Gradebook's Final Grade, only show Posted Final Grade	Prevents the Term/Semester/Final Grade from appearing until the grade is posted. If selected, only a posted Final grade is displayed. If not selected, the Final grade from the Gradebook is displayed until grades are posted.
Do not show percent when using proficiency-based scoring on Benchmarks	Prevents Benchmarks Proficiency Grading from appearing. This option applies only when a teacher is attaching benchmarks to Assignments in Secondary Gradebook and using Proficiency Grading to score them.
Post Gradebook assignment comments	Shows assignment comments.

Options in this Area	Description of Options
<p>Show Progress Report icon on Gradebook Display instead of calculated grade</p>	<p>An icon () appears on the Gradebook Display in place of the actual calculated grade before the end of a Grading Period. This is designed to reinforce to guardians and students that a calculated grade is a running total and not finalized. If not selected, the actual calculated Grade is displayed. You can click either the icon or the Grade to access the same detailed information.</p>
<p>Display Link to view Grade Marks on Progress Detail popup</p>	<p>Shows a View Grade Mark hyperlink for a specific Class. Clicking the link displays the Grade Mark Groups for that Class.</p>
<p>Display Grade Marks on Class Progress Detail popup</p>	<p>Shows the Grade Marks for a Class.</p>
<p>Display % Earned in Subjects, Skills, and Events for Standards Gradebooks</p>	<p>Only pertains to grades from Standards Gradebook. It controls whether percentages are displayed for Subject, Skills, and Event. If not selected, only the Grade Mark is displayed.</p>
<p>Show midterm grades for Gradebook classes</p>	<p>Shows midterm grades (if used). This option only affects Secondary Gradebook.</p>
<p>Only show Posted grades</p>	<p>Only shows the midterm Grades that have been Posted. This option is available only when Show midterm grades for Gradebook classes is selected.</p>
<p>Always Display Assignments/Events Based on Control Set Dates</p>	<p>Causes Assignments/Events to always be displayed based on Class Control Sets, regardless of how the Gradebook is set up. This does not affect how Term, Semester, or Final Grades are calculated.</p>
<p>Show Class Assignment/Event High/Low Scores on Assignment/Event Popup</p>	<p>Shows the Class high and low scores of an Assignment.</p>

Options in this Area	Description of Options
Show Class Assignment/Event Average Score on Assignment/Event Popup	Shows the Class average score of an Assignment.
Show Class Assignment/Event Median Score on Assignment/Event Popup	Shows the Class median score of an Assignment.
Display Popup Message Before Displaying Assignment/Event Detail Popup	Shows a message before the Assignment or Event Detail pop-up screen opens. You can type the message in the box below this option.
Show a Posted Grade before the end of the posting period	<p>If a posted grade exists, posted instead of calculated grades appear before the end of the posting period. This option is not available if you select Do not show Posted Grades until XX days past the posting window end date.</p> <p>For example, the posting period is February 1 to February 3. On February 1, a student has a calculated grade of 'B' in the Gradebook and the teacher posts grades. Family and Student Access display a 'B' since it is both the calculated grade and the posted grade. On February 2, the teacher scores additional assignments and the student's calculated grade is now an A-. The teacher has not posted grades again. If this option is selected, the grade displayed on Family and Student Access is the last posted grade (B). If this option is not selected, the grade displayed on Family and Student Access is the calculated grade (A-).</p>
Do not show Posted Grades until XX days past the posting window end date	Prevents posted grades from appearing until XX days after the end of the Posting Window.

Options in this Area	Description of Options
Do not show Posted Subject/Skill Grades until XX days past the XXX end date	Prevents posted Skill and Subject grades from appearing until XX days after the end of the Posting Window or Grading Window. This option is not available if you select Show a Posted Grade before the end of the posting Period.
Do not display Athletic Grade Bucket	Prevents guardians from viewing Athletic grades that a teacher posts. To learn more about Athletic Grading, see the <i>WSIPC Guide to Grading</i> .
Do not show both Secondary and Standards Gradebook	Allows you to select which Gradebook to show in Family and Student Access when a school assigns both Secondary and Standards Gradebooks to each Class.
Default display for all non-Standards Courses	Determines whether the default display for Courses not using Standards Gradebook is Expanded or Collapsed.
Default display for all Standards Courses	Determines whether the default display for Standards Gradebook Courses is Expanded or Collapsed.
Default display for all Subjects	Determines whether the default display for all Standards Gradebook Subjects is Expanded or Collapsed.
Default display for all Skills	Determines whether the default display for all Standard Gradebook Skills is Expanded or Collapsed.
Display Entity Contact For this Application	Enables the Grading contact to appear in Contact Us in Student Access for students to communicate with the school's designated Grading contact.

**Table 12 - Description of Gradebook Entity Configuration options**

## Graduation Requirements

The Graduation Requirements application displays a student's progress towards meeting Coursework Requirement Areas (CRAs) according to their Graduation Plan. The number of credits for each CRA appears for the following categories:

- Required
- Completed
- In Progress
- Next Year
- Future
- Waived
- Remaining

Information about the classes that were taken to fulfill each CRA also appears.

Figure 12 shows the Graduation Requirements Entity Configuration screen. Table 13 describes the available options.

The screenshot displays the 'Graduation Requirements Entity Configuration' interface. At the top, the title bar reads 'Graduation Requirements Entity Configuration'. Below the title, there are two input fields: 'Entity: 401' and 'Section and Application: General Information -- Graduation Requirements'. To the right of these fields are 'Save' and 'Back' buttons. The main content area is split into two columns: 'Guardian Options' on the left and 'Student Options' on the right. Each column contains a 'Disable Application' checkbox, a radio button for 'Do Not Display Button' (which is selected), and a radio button for 'Display Button and Message'. Below these options are text input areas for messages. The 'Guardian Options' section includes checkboxes for 'Display Staff Email Address', 'Do Not Show Teacher', and 'Do Not Show Room'. The 'Student Options' section includes checkboxes for 'Display Staff Email Address', 'Display Entity Contact For this Application', 'Do Not Show Teacher', and 'Do Not Show Room'. In the top right corner of the window, there are icons for help, search, and other utility functions.

Figure 12 - Graduation Requirements Entity Configuration screen

Option	Description
Display Staff Email Address	Allows the Entity to determine if the staff email address link displays.
Do Not Show Teacher	Allows the Entity to determine if the teacher's name displays.
Do Not Show Room	Allows the Entity to determine if the room where the class was taken displays.
Display Entity Contact for this Application	Enables the Curriculum Contact to appear in Contact Us in Student Access for students to communicate with the school's designated Curriculum staff.

Table 13 - Description of the options on the Graduation Requirements screen

## Homeroom

The Homeroom application displays information about a student's homeroom and a list of other students in the homeroom, along with each student's Address, Phone Number, Birth month and date, and Gender. Figure 13 shows the Homeroom Entity Configuration screen. Table 14 describes the available option.

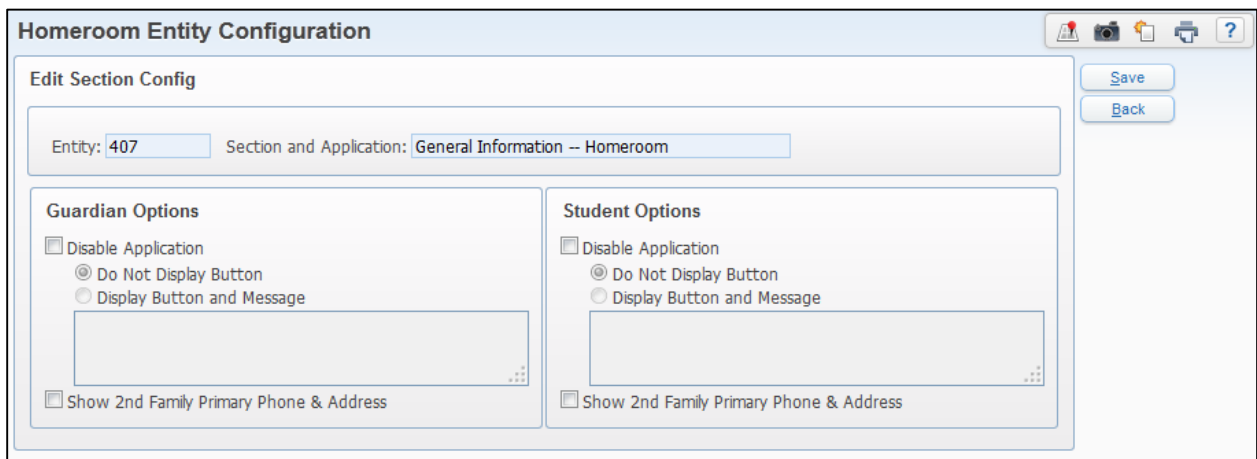


Figure 13 - Homeroom Entity Configuration screen

Option	Description
Show 2 <sup>nd</sup> Family Primary Phone & Address	Determines whether to display phone and address information for Family 2.

Table 14 - Description of Homeroom Entity Configuration option

## Message Center

The Message Center application shows messages that administrators post using the Admin Message Center. It also shows messages that teachers post using the Class Message Center. Advisor Messages and Activity Messages also display in the Message Center. Figure 14 shows the Message Center Entity Configuration screen. Table 15 describes the options on this screen.

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**Note** The Schedule application must be enabled for Class Messages to be available in Family Access.

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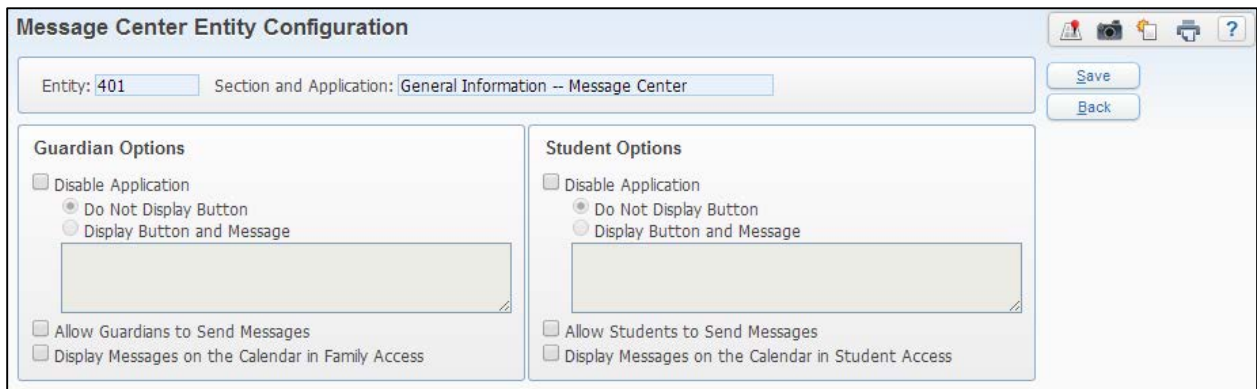


Figure 14 - Message Center Entity Configuration screen

Guardian/Student Option	Description
Allow Guardians / Students to Send Message Center Messages	Allows guardians and/or students to create and post a new message to their teacher(s).
Display Messages on the Calendar in Family Access / Student Access	Allows messages to be displayed on the Calendar in Family Access and/or Student Access.

Table 15 - Description of Message Center Entity Configuration options

## My Calendar

The Calendar application shows a monthly calendar with the following information:

- Absences
- Tardies
- Gradebook Assignments/Events and Grades earned
- Message Center messages
- Activity Events
- Notes
- Test Administration information
- Childcare
- School day information

Figure 15 shows the My Calendar Entity Configuration screen. Table 16 explains the options available on this screen.

**My Calendar Entity Configuration**

Entity: 401 Section and Application: General Information -- My Calendar

**Guardian Options**

- Disable Application
- Do Not Display Button
- Display Button and Message
- Do not Show Calendar for Certain [Grade Levels](#)
- Do not Show Gradebook Assignments on Calendar
- Show Lesson Scheduler Items on Calendar
- Show Calendar Day Comments for School Days

**Student Options**

- Disable Application
- Do Not Display Button
- Display Button and Message
- Do not Show Calendar for Certain [Grade Levels](#)
- Do not Show Gradebook Assignments on Calendar
- Show Lesson Scheduler Items on Calendar
- Show Calendar Day Comments for School Days

Save Back

Figure 15 - My Calendar Entity Configuration screen



Option	Description
Do not Show Calendar for Certain Grade Levels	Hides the calendar for specific grade levels. Click Grade Levels to select grade levels.
Do not Show Gradebook Assignments on Calendar	Prevents Gradebook assignments from appearing on the Calendar.
Show Lesson Scheduler Items on Calendar	Determines whether Lesson Scheduler Items display on the Calendar.
Show Calendar Day Comments for School Days	Determines whether comments on a calendar day display on the Calendar.

Table 16 - Description of the My Calendar Entity Configuration options

## Notes

The Notes application allows guardians or students to post a note that is available in the Calendar application. Notes that guardians post are visible to their students, and notes that students post are visible to guardians. There are no configuration options for this application.

## Portfolio

The Portfolio application shows documents in a student's portfolio. Documents that are viewable through the Portfolio include, but are not limited to, the following:

- Report Cards
- Attendance Letters
- Data Mining reports that are marked for display in Family Access
- Highlights

You can rename the Portfolio application to give it a customized, district-defined name. For example, you may want to rename it “Documents and Report Cards” to better reflect what a guardian or student finds there. See “[Configuring District Display Settings](#)” (page 82) to learn how to change the name of the Portfolio application.

### Pseudo Changes

The Pseudo Changes application is only available to guardians in Family Access. It allows guardians to view, edit, or change requests to student information, family information, alert/emergency information, emergency contacts, and health information.

To configure Pseudo Changes:

1. Do one of the following:
  - Go to Student Management\Families\FM Setup\CF\EC.
  - Go to Student Management\Students\SA Setup\CF\EC.

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<b>Note</b>	Both Family Access and Student Access options can be enabled from either location.
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2. Expand General Information.
3. Click Edit to the left of Pseudo Changes.
4. Clear the Disable Application box.
5. Click Setup Fields.
6. Select the area(s) where you want to allow guardians to make changes.
7. Configure the Pseudo Family Changes Setup screen (Figure 16). For each field, select Auto-Approve, Approval Needed, Read Only, or Hide. You can also enter a Free Form Message for some fields. Table 17 describes each of these options.
8. Click Save.

## Pseudo Family Changes Setup

### Family Access General Information

This area allows districts to grant primary families access to request changes to their student's general information in Family Access.

**Allow Primary Families access to request changes to:**

Student Information

#### Fields Available to Change

Set All Fields to:  Auto-Approve  Approval Needed  Read-Only  Hide

Student Name:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	
Home Phone:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	<input type="button" value="Free Form Message"/>
Student Second Phone:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	
Student Third Phone:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	
Student School Email:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	
Student Home Email:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	
Birthdate:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	
Birth County:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	
Birth State:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	
Birth Country:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	
Language:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	
Native Language:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	<input type="button" value="Free Form Message"/>
Federal/State Ethnicity:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	
State Race:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	
Federal Race:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	
Local Race:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	
Gender:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	
Military Use:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	<input type="button" value="Free Form Message"/>
Public Use:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	<input type="button" value="Free Form Message"/>
Local Use:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	<input type="button" value="Free Form Message"/>
Higher Ed Use:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	<input type="button" value="Free Form Message"/>
District Use:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input checked="" type="radio"/> Read-Only	<input type="radio"/> Hide	<input type="button" value="Free Form Message"/>
Media Use:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input type="radio"/> Read-Only	<input checked="" type="radio"/> Hide	
Vendors Use:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input type="radio"/> Read-Only	<input checked="" type="radio"/> Hide	
Field Trips Use:	<input type="radio"/> Auto-Approve	<input type="radio"/> Approval Needed	<input type="radio"/> Read-Only	<input checked="" type="radio"/> Hide	

Do Not Display Help Icon for Demographic Distribution Fields

Family Information

Alert/Emergency Information

Emergency Contacts

Health Information

Figure 16 - Pseudo Family Changes Setup screen

Column	Description
Auto-Approve	Changes guardians make are immediately updated in the database. This option may not be available for some fields.
Approval Needed	Changes guardians make are listed in the Pseudo Changes queue for designated staff to approve before they are updated in the database.
Read-Only	Guardians can only view the field. Changes are not allowed.
Hide	The field is hidden in this application.
Free Form Message	Provides an area where you can write a message to display in Family Access that tells the guardian what the field is used for. Available for the following areas: <ul style="list-style-type: none"> <li>▪ Native Language</li> <li>▪ Military Use</li> <li>▪ Public Use</li> <li>▪ Local Use</li> <li>▪ Higher Ed Use</li> <li>▪ District Use</li> </ul>
Show Google Maps Link for Primary Address	Allows a link to Google Maps to display that locates the Primary Address. Available in the Family Information area.
Show Google Maps Link for Mailing Address	Allows a link to Google Maps to display that locates the Mailing Address. Available in the Family Information area.
Do Not Allow	Prevents the ability to add or delete an Emergency Contact. Available in the Emergency Contacts area.

**Table 17 - Description of Pseudo Family Changes Setup options**

## Report Cards

The Report Cards application displays a student’s report cards that have been electronically posted to the student’s portfolio. To learn more about posting report cards to student Portfolios, see the *WSIPC Guide to Grading*.

Figure 17 shows the Report Cards Entity Configuration screen. Table 18 describes an option on this screen.

---

<b>Note</b>	To remove report cards that have been electronically posted to the student’s portfolio, use the Mass Delete Portfolio Attachments Utility. To learn more about this utility, see the <i>WSIPC Guide to Student Demographics and Families</i> .
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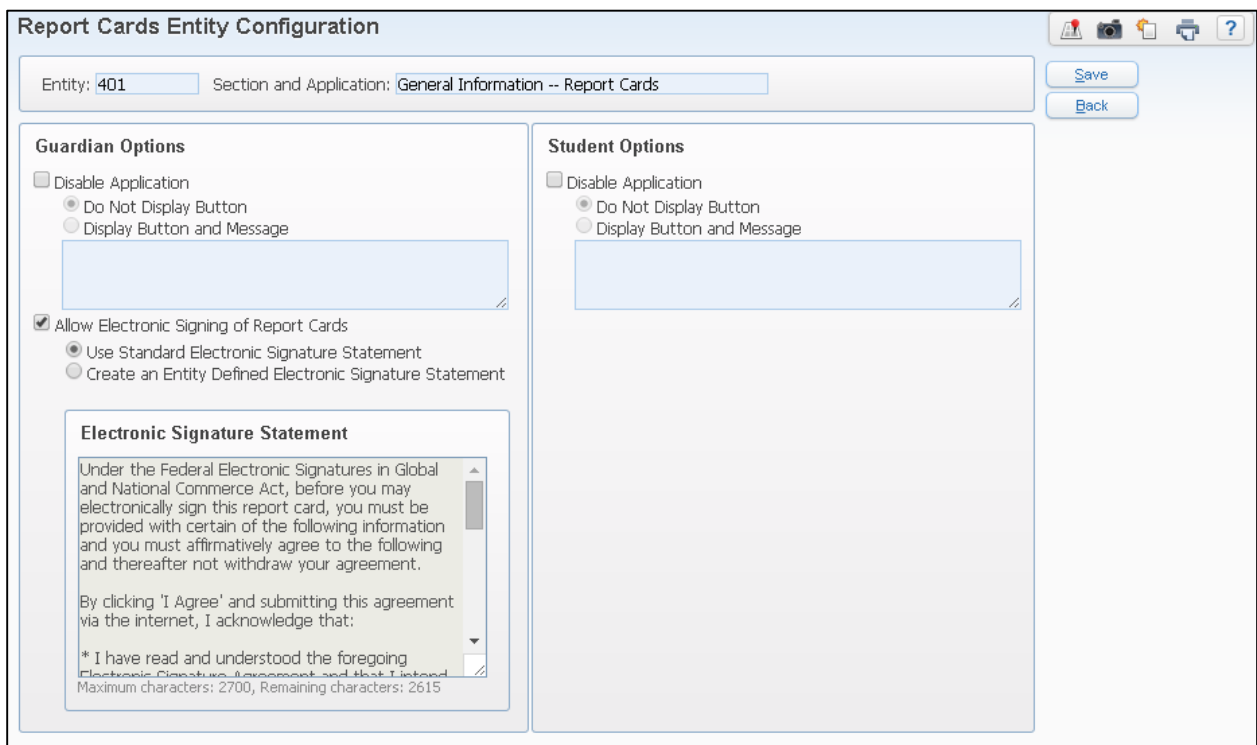


Figure 17 - Report Cards Entity Configuration screen

Option	Description
Allow Electronic Signing of Report Cards	Allows guardians to electronically sign and document that they have viewed the report card. Select Use Standard Electronic Signature Statement to use a predefined statement. Select Create an Entity Defined Electronic Signature Statement to create a custom message. When enabled, the Attachments screen on the Portfolio tab in Student Profile includes an eSign column which reflects whether the guardian has electronically signed the report card.

Table 18 - Description of an option on the Report Cards Entity Configuration screen

## Report Directory

The Report Directory application shows Data Mining reports that are made available in Family and Student Access. These reports are available in the Portfolio application. The report includes only data pertaining to the student within the ranges on the Data Mining Report. To learn more about making a Data Mining report available in Family and Student Access, see the *WSIPC Guide to Student Data Mining*. There are no options for this application.

---

<b>Note</b>	Report information is dynamic and is generated with current data when a guardian runs it from Family Access.
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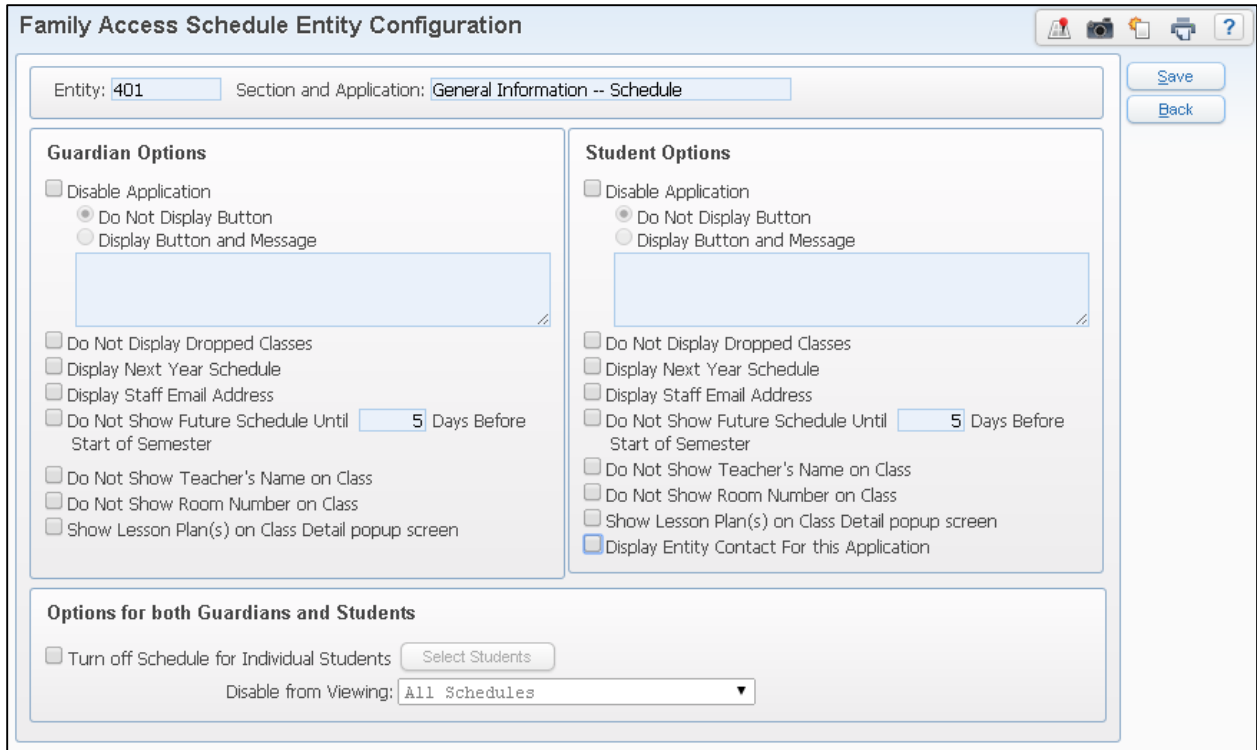
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## RTI Information

Response to Intervention (RTI) helps districts identify and improve the educational performance of students who are performing below grade level (at-risk students).

## Schedule

The Schedule application shows a student’s current year and next year schedules. Figure 18 shows the Family Access Schedule Entity Configuration screen. Table 19 describes the options on this screen.



**Figure 18 - Family Access Schedule Entity Configuration screen**

Option	Description
Do Not Display Dropped Classes	Hides dropped classes. If not selected, dropped classes appear with a red downward arrow next to them.
Display Next Year Schedule	Shows the student's next year schedule. Some districts use this option to hide the students' next year schedules until they are finalized.
Display Staff Email Address	Shows email address for staff if it is entered on their staff record.
Do Not Show Future Schedule Until XX Days Before Start of Semester	Hides the schedule for the next semester. Some districts use this option to hide the students' next semester schedules until they are finalized. If selected, enter the number of calendar days that the schedule should be hidden.
Do Not Show Teacher's Name on Class	Hides the name of the teacher for classes the student is enrolled in.
Do Not Show Room Number on Class	Hides the room number for classes the student is enrolled in.

Option	Description
Show Lesson Plan(s) on Class Detail popup screen	Determines whether Lesson Plan(s) display on the Class Detail popup screen when a guardian or student pauses the mouse over the schedule.
Turn off Schedule for Individual Students	Prevents selected students from viewing their schedule.
Disable from Viewing	Allows you to disable All Schedules, Current Year Schedule, Future Schedule in Current Year or Next Year Schedule from view for selected students.

Table 19 - Description of Family Access Schedule Entity Configuration options

## School Directory

The School Directory application allows you to determine whether or not families can share their address, phone number, and email information with other families in the district.

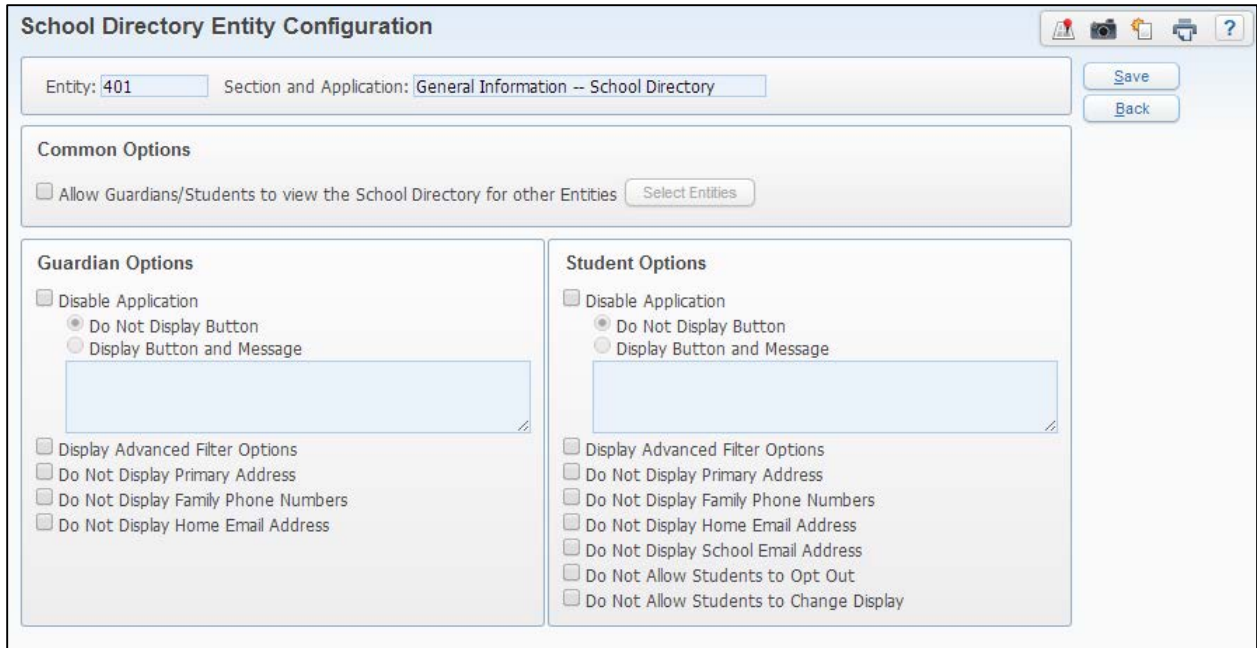
Figure 19 shows the School Directory Entity Configuration screen. Table 20 describes the options on this screen.

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<b>Note</b>	School Directory is an “opt in” feature. When you enable School Directory, guardians and students can manage what contact information is shared with other families in the School Directory through My Account when they are logged in to Family or Student Access.
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**Figure 19 - School Directory Entity Configuration screen**

Option	Description
Allow Guardians/Students to view the School Directory for Other Entities	Allows you to define which Entities a family can view School Directory information for.
Display Advanced Filter Options	Allows Show Advanced Filter Options link to display on the School Directory application for guardians and students. Advanced filters allow a guardian or student to search the directory by Homeroom, Advisor or Grade.
Do Not Display Primary Address	Selecting this option prevents the family address from appearing and removes the option for guardians and students to choose whether or not to display their primary address in School Directory.
Do Not Display Family Phone Numbers	Selecting this option prevents all phone numbers for a guardian and/or student from appearing and removes the option for guardians and students to choose whether or not to display their family phone numbers in School Directory.

Option	Description
Do Not Display Home Email Addresses	Selecting this option prevents the home email address for a guardian and/or student from appearing and removes the option for guardians and students to choose whether or not to display their home email address in School Directory.
Do Not Display School Email Address	Selecting this option prevents the student's school email address from appearing and removes the option for students to choose whether or not to display it in School Directory.
Do Not Allow Students to Opt Out	Prevents students from choosing not to include their information in School Directory.
Do Not Allow Students to Change Display	Prevents students from choosing what information is included in School Directory.

Table 20 - Description of the options on the School Directory Entity Configuration screen

## Skylert

The Skylert application allows all guardians in all families to manage their Skylert subscriptions to receive General, Emergency, and Attendance notifications from the school.

Figure 20 shows the Skylert Entity Configuration screen. Table 21 describes the options on this screen.

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<b>Note</b>	Skylert is designed for those districts using School Messenger.
-------------	---

---

**Skylert Entity Configuration**

Entity: 401    Section and Application: General Information -- Skylert

**Guardian Options**

Disable Application

Do Not Display Button

Display Button and Message

**Skylert Options**

Allow Guardians to update their Skyward Contact Info  
With this option *checked*, the first 3 phone numbers and first email address will be enabled for the guardian to update and will be saved to Skyward and SchoolMessenger.

- All other information (including additional phone numbers, email addresses, SMS numbers and notification options) will only be saved to SchoolMessenger
- All families and guardians for a student will have access to Skylert using this interface

Do Not Allow Primary Guardian to turn off the following Notifications for Skyward Phone Numbers and Email Address:

Emergency Notifications     Attendance Notifications     General Notifications

**Figure 20 - Skylert Entity Configuration screen**

Option	Description
Allow Guardians to update their Skyward Contact Info	<p>Allows guardians to change the first three phone numbers and first email address, which also changes the information in both your district’s database and School Messenger <b>without</b> district staff verification.</p> <p>All other information, including additional phone numbers beyond the first three, email addresses, text message numbers, and notification options are updated in School Messenger only.</p> <p><b>Caution:</b> This option allows guardians to change their email address and phone numbers directly in the database.</p>
Do Not Allow Primary Guardian to turn off the following Notifications for Skyward Phone Numbers and Email Address	<p>Prevents guardians from unsubscribing from one or more of the following notifications:</p> <ul style="list-style-type: none"> <li>• Emergency Notifications</li> <li>• Attendance Notifications</li> <li>• General Notifications</li> </ul>

**Table 21 - Description of Skylert Entity Configuration options**

## Student Information

The Student Information application displays a student’s demographic, family, and emergency information. You can also configure Student Information to display information from the Busing and Locker modules.

Figure 21 shows the Student Information Entity Configuration screen. Table 22 describes the options on this screen.

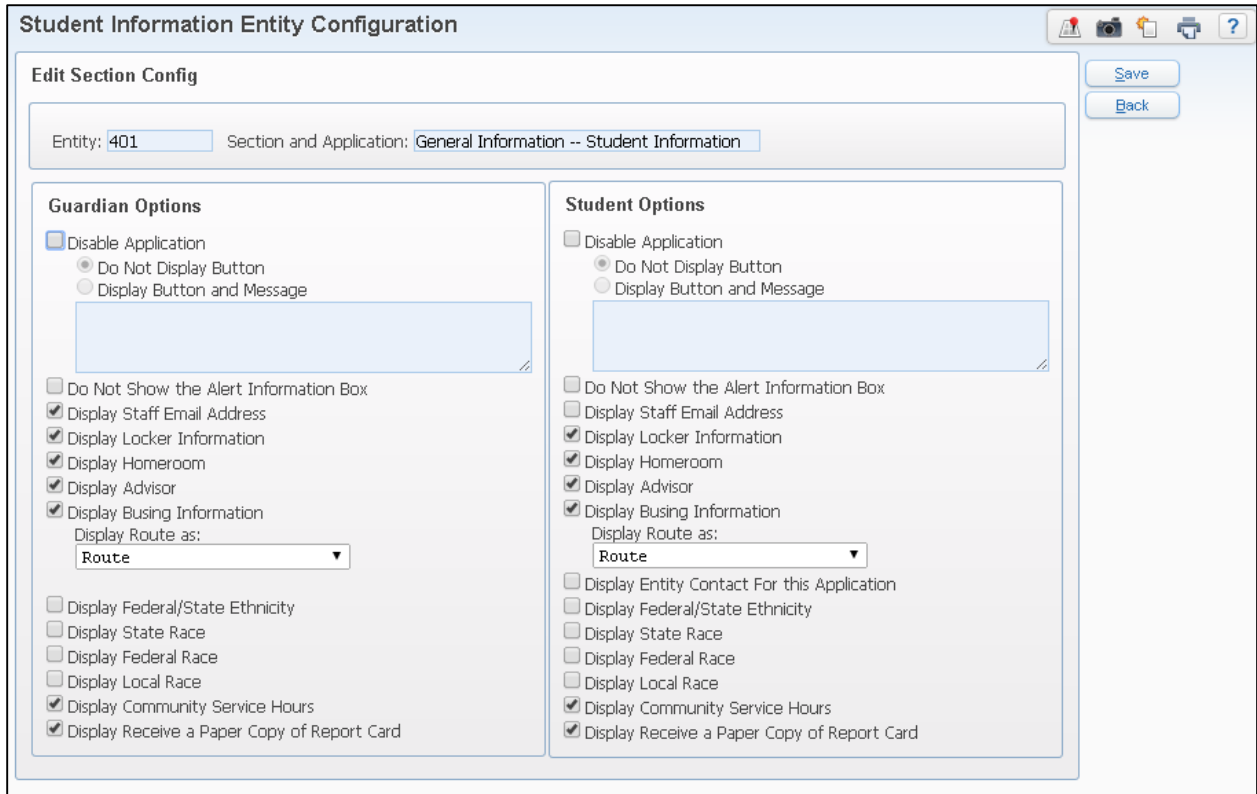


Figure 21 - Student Information Entity Configuration screen

Option	Description
Do Not Show the Alert Information Box	Hides the Alert Information. When this option is not selected, you can determine on a student-by-student basis whether or not to display Alert Information in Family or Student Access on the student's Emergency Info tab in Student Profile (Student Management\ Students\ST\PR).
Display Staff Email Address	Shows staff names as hyperlinks to their email addresses.
Display Locker Information	Shows student locker information.
Display Homeroom	Shows the student's Homeroom.
Display Advisor	Shows the student's Advisor.
Display Busing Information	Shows student busing information. If enabled, select whether the student's route information is displayed as a Bus Number or a Route Number.
Display Entity Contact For this Application	Enables the Student Info contact to appear in Contact Us in Student Access.
Display Federal/State Ethnicity	Shows Federal/State Ethnicity information.
Display State Race	Shows State Race information.
Display Federal Race	Shows Federal Race information.
Display Local Race	Local Race is no longer used for State Reporting. Do not use this field or have it show in Family or Student Access.
Display Community Service Hours	Shows Community Service Hours.
Display Receive a Paper Copy of Report Card	Shows whether the family receives paper report cards or not.

**Table 22 - Description of Student Info Entity Configuration options**

## Student Services

The Student Services application displays a student’s Student Services data, including Special Education, Section 504, and Gifted and Talented information. This application is available only to guardians.

Figure 22 shows the Student Services Entity Configuration screen. To determine what information is accessible to guardians in Family Access, select the appropriate options. Table 23 describes these options.

Figure 22 - Student Services Entity Configuration screen

AREA	PURPOSE OF AREA
Special Education Information	Allows you to determine what Special Education Information is displayed.
Options in This Area	Description of Options
Display Special Education Information	Allows you to define what Special Education Information will display in Family Access.
Display Current Disabilities	Determines whether a student’s current disabilities will display.

Options in This Area	Description of Options
Display Current Placements	Determines whether a student's current placements will display.
Display Current Team Members	Determines whether a student's current Team Members will display.
Display Contact Attempts	Determines whether a student's contact attempts will display. Contact Attempts are optional records that may be entered on the Contact tab of a student's Special Education record.
Display Action History	Determines whether the history of changes made to a student's Special Education records display.

AREA	PURPOSE OF AREA
Other Student Services Areas	Allows you to determine whether Section 504 and Gifted & Talented information is displayed

Options in This Area	Description of Options
Display Section 504 Information	Determines if students' Section 504 records display.
Display Current Disabilities	Determines if students' current disabilities on their Section 504 records display.
Display Current Impairments	Determines if students' current impairments display.
Display Current Life Activities	Determines if students' current life activities on their Section 504 records display.
Display Student Accommodations	Determines if students' accommodations on their Section 504 records display.
Display 504 Action History	Determines if history of changes made to students' Section 504 records display.
Display Gifted & Talented Information	Determines if students' Gifted & Talented records display.

Table 23 - Description of the options on the Student Services Entity Configuration screen

## Teacher Conferences

The Teacher Conferences application allows guardians to select or view a time slot during which they are scheduled to meet with their student’s teacher. Depending on how you configure this application, guardians can select a conference time or view times that have been assigned to them. This application is available for guardians only. Figure 23 shows the Teacher Conferences Entity Configuration screen. Table 24 describes the option unique to Teacher Conferences. To learn more about how to configure Teacher Conferences, see the *WSIPC Guide to Conference Scheduler for Office Personnel*.

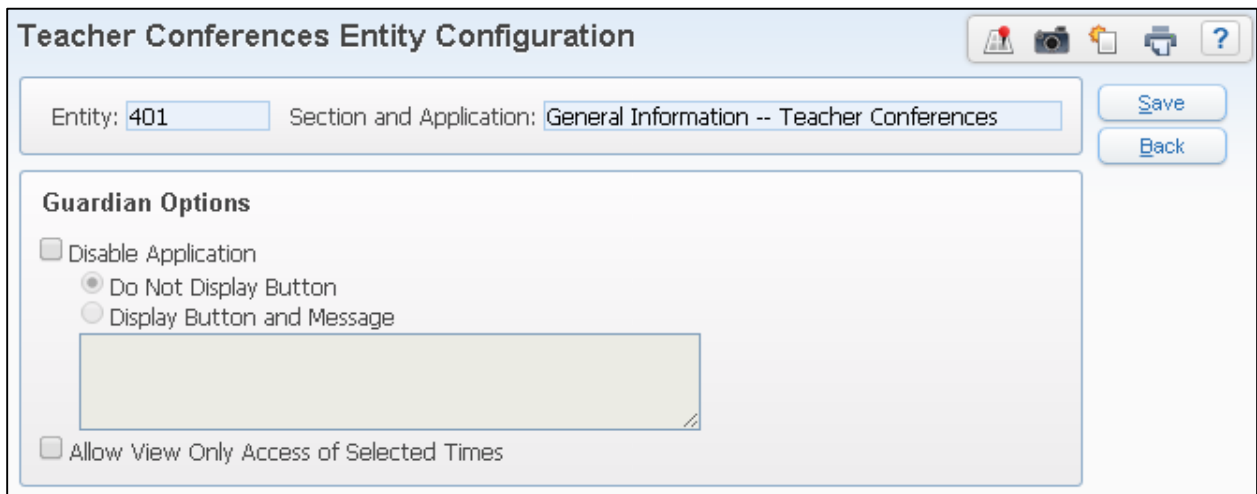


Figure 23 - Teacher Conferences Entity Configuration screen

Option	Description
Allow View Only Access of Selected Times	Allows guardians to view teacher conference times without being able to select or change a time slot.

Table 24 - Description of an option on the Teacher Conferences Entity Configuration screen

## Test Scores

The Test Scores application shows a student’s Test Scores from the Assessment module. You can also show testing dates on the Family Access calendar. Each test can be shown or hidden in Family and Student Access. There are no additional configuration options for this application.



## Configuring Course Requests

The Course Requests application allows guardians and students to view and update their Course Requests for a current or future term or school year. To learn more about Future Scheduling and Request Processing, see the *WSIPC Guide to Future Scheduling – Part Two: Managing Student Requests*.

Course Requests contain the following components:

- [Alternate](#)
- [Available](#)
- [Selected](#)
- [Update Selected](#)

The sections below describe the Configuration screen for each component.

---

<b>Note</b>	Course Request components are found in the Application Name column.
-------------	---

---

To configure Course Requests:

1. Do one of the following:
  - Go to Student Management\Families\FM Setup\CF\EC.
  - Go to Student Management\Students\SA Setup\CF\EC.

---

<b>Note</b>	Both Family Access and Student Access options can be enabled from either location.
-------------	--

---

2. Expand the Course Requests record.
3. Click Edit next to the year and component that you want to configure (see Figure 24).
4. Configure the screen and click Save. The configuration screen for each component is described below.

Course Requests				Family Access		Student Access	
	Year	Sem/Term	Application Name	Enabled	Display Message	Enabled	Display Message
Edit	2015		Alternate	NO	NO	NO	NO
Edit	2015		Available	NO	NO	NO	NO
Edit	2015		Selected	NO	NO	NO	NO
Edit	2015		Update Selected	NO	NO	NO	NO
Edit	2016	SEMESTER1	Alternate	NO	NO	NO	NO
Edit	2016	SEMESTER1	Available	NO	NO	NO	NO
Edit	2016	SEMESTER1	Selected	NO	NO	NO	NO
Edit	2016	SEMESTER1	Update Selected	NO	NO	NO	NO
Edit	2016	SEMESTER2	Alternate	NO	NO	NO	NO
Edit	2016	SEMESTER2	Available	NO	NO	NO	NO
Edit	2016	SEMESTER2	Selected	NO	NO	NO	NO
Edit	2016	SEMESTER2	Update Selected	NO	NO	NO	NO

Figure 24 - Course Requests screen

## Alternate

The Alternate component allows guardians and students to select alternate courses to take, in the event that one or more of their requested courses are not available. Figure 25 shows the Alternate Entity Configuration screen. Table 25 describes options on this screen.

### Alternate Entity Configuration

**Edit Course Requests Configuration - 2015**

Entity:  Section and Application:

**Guardian Options**

Disable Application

Do Not Display Button

Display Button and Message

Maximum Alternate Requests:

Use Course Request Time Periods to determine if window is open

Do Not Show Required/Elective in class list

**Note: This will apply to All Course Request Applications for 2015**

**Student Options**

Disable Application

Do Not Display Button

Display Button and Message

Maximum Alternate Requests:

Use Course Request Time Periods to determine if window is open

Do Not Show Required/Elective in class list

**Note: This will apply to All Course Request Applications for 2015**

Figure 25 - Alternate Entity Configuration screen

Option	Description
Maximum Alternate Requests	The maximum number of Alternate Requests that can be entered per student. This is based on the number of classes that can be requested as an Alternate, <i>not</i> the number of credits.
Use Course Request Time Periods to determine if window is open	<p>If selected, you can click Time Periods and configure windows in which course requests should be available for a range of students.</p> <p><b>Note:</b> If this option is used, you must enter a value greater than 0 for Maximum Alternate Requests.</p>
Do Not Show Required/Elective in class list	Hides the Required/Elective indicator.

Table 25 - Description of Alternate Entity Configuration options

### Available

The Available component allows guardians and students to view available courses for selection. The only option available is Do Not Show Required/Elective in class list, which hides the Required/Elective indicator.

### Selected

The Selected component allows guardians and students to view their selected Course Requests and Alternates. The only available option is Do Not Show Required/Elective in class list, which hides the Required/Elective indicator.

### Update Selected

The Update Selected component allows guardians and students to select Course Requests for a future term or school year. Figure 26 shows the Update Selected Entity Configuration screen. Table 26 describes the options on this screen.

**Update Selected Entity Configuration**

**Edit Course Requests Configuration - 2015**

Entity:  Section and Application:

**Guardian Options**

- Disable Application
- Do Not Display Button
- Display Button and Message
- 
- Limit Number of Requested Credits to
- Allow Courses Requested through Office to be removed
- Allow Guardian to schedule courses previously passed
- Allow Guardians to select students' Band Instrument
- Only list class sections for courses based on student's Career Plan
- Use Course Request Time Periods to determine if window is open
- Do Not Show Required/Elective in class list

**Note: This will apply to All Course Request Applications for 2015**

**Student Options**

- Disable Application
- Do Not Display Button
- Display Button and Message
- 
- Limit Number of Requested Credits to
- Allow Courses Requested through Office to be removed
- Allow Student to schedule courses previously passed
- Allow Students to select their Band Instrument
- Only list class sections for courses based on student's Career Plan
- Use Course Request Time Periods to determine if window is open
- Do Not Show Required/Elective in class list

**Note: This will apply to All Course Request Applications for 2015**

Buttons: Save, Back, Time Periods

**Figure 26 - Update Selected Entity Configuration screen**

Option	Description
Limit Number of Requested Credits to	Controls the maximum number of credits a student can request. If selected, enter a maximum credit amount.
Allow Courses Requested through Pac to be removed	Guardians or students can remove courses that a staff member requests through the Future Scheduling module.
Allow Guardian / Student to schedule courses previously passed	Guardians and students can request a Course that the student has completed and earned a passing grade.
Allow Guardians / Students to select students' / their Band Instrument	Guardians and students can select their Band Instrument. This option is used by districts that rent or loan out band instruments, allowing them to accurately forecast and account for each instrument need.
Only list class sections for courses based on student's Career Plan	Prevents classes that are not on a student's Career Plan from being listed.
Use Course Request Time Periods to determine if window is open	If selected, you can click Time Periods and configure windows in which course requests should be available for a range of students.

Option	Description
Do Not Show Required/Elective in class list	Hides the Required/Elective indicator.

Table 26 - Description of Update Selected Entity Configuration options

## Configuring Arena Scheduling

The Arena Scheduling application allows guardians and students to build their schedule for a future term or school year. To learn more about Future Scheduling, see the *WSIPC Guide to Future Scheduling – Part Four: Scheduling Students*.

Arena Scheduling contains the following components:

- [Available Classes](#)
- [Messages](#)
- [Selected Classes](#)
- [Submit Classes](#)

The sections below describe the Configuration screen for each component.

---

<b>Note</b>	Arena Scheduling components are found in the Application Name column.
-------------	---

---

To configure Arena Scheduling:

1. Do one of the following:
  - Go to Student Management\Families\FM Setup\CF\EC.
  - Go to Student Management\Students\SA Setup\CF\EC.

---

<b>Note</b>	Both Family Access and Student Access options can be enabled from either location.
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---

2. Expand Arena Scheduling.
3. Click Edit next to the year and component that you want to configure (see Figure 27).

- Configure the screen and click Save. The configuration screen for each component is described below.

Arena Scheduling				Family Access		Student Access	
	Year	Sem/Term	Application Name	Enabled	Display Message	Enabled	Display Message
Edit	2015		Available Classes	NO	NO	NO	NO
Edit	2015		Messages	NO	NO	NO	NO
Edit	2015		Selected Classes	NO	NO	NO	NO
Edit	2015		Submit Classes	NO	NO	NO	NO
Edit	2016	SEMESTER1	Available Classes	NO	NO	NO	NO
Edit	2016	SEMESTER1	Messages	NO	NO	NO	NO
Edit	2016	SEMESTER1	Selected Classes	NO	NO	NO	NO
Edit	2016	SEMESTER1	Submit Classes	NO	NO	NO	NO
Edit	2016	SEMESTER2	Available Classes	NO	NO	NO	NO
Edit	2016	SEMESTER2	Messages	NO	NO	NO	NO
Edit	2016	SEMESTER2	Selected Classes	NO	NO	NO	NO
Edit	2016	SEMESTER2	Submit Classes	NO	NO	NO	NO

Figure 27 - Arena Scheduling screen

## Available Classes

The Available Classes component allows guardians and students to view and schedule classes that are available to them. Figure 28 shows the Available Classes Entity Configuration screen. Table 27 describes the options on this screen.

**Available Classes Entity Configuration**

Edit Arena Scheduling Configuration - 2015

Entity:  Section and Application:

**Guardian Options**

Disable Application

Do Not Display Button  
 Display Button and Message

Allow Teacher Name as a search and display option  
 Only list class sections for courses student requested  
 Only list class sections for courses based on student's Career Plan  
 Allow Add/Remove of Courses

Allow Add of Alternate Requests  
 Force Students to schedule Co-requisites  
 Do Not Show Room Number in class list

**Student Options**

Disable Application

Do Not Display Button  
 Display Button and Message

Allow Teacher Name as a search and display option  
 Only list class sections for courses student requested  
 Only list class sections for courses based on student's Career Plan  
 Allow Add/Remove of Courses

Allow Add of Alternate Requests  
 Force Students to schedule Co-requisites  
 Do Not Show Room Number in class list

Figure 28 - Available Classes Entity Configuration screen

Option	Description
Allow Teacher Name as a search and display option	Guardians and students can see the name of the teacher who teaches each class and search for classes by teacher.
Only list class sections for courses student requested	Shows guardians and students only classes based on what they have requested. If disabled, Guardians and Students see all classes, even those that they did not request.
Only list class sections for courses based on student's Career Plan	Prevents classes that are not on a student's Career Plan from being listed.
Allow Add/Remove of Courses	Guardians and students can add classes to, and remove classes from, their schedules.
Allow Add of Alternate Requests	Guardians and students can add their Alternate Request to their schedule. This option is only available if Allow Add/Remove of Courses is enabled.
Force Students to schedule Co-requisites	Requires student to be scheduled into a section of the co-requisite course. If a section of the co-requisite course isn't selected, neither course is scheduled.
Do Not Show Room Number in class list	Hides the room number when the course and class information is viewed on the Available, Selected, or Submit Classes tabs in Family Access (using Class hyperlink).

Table 27 - Description of Available Classes Entity Configuration options

## Messages

The Messages component allows guardians and students to communicate with the Counselor regarding the student's future term/year schedule. There are no configuration options.

## Selected Classes

The Selected Classes component allows guardians and students to view and print the schedules that they have built. There are no configuration options.

## Submit Classes

The Submit Classes component allows guardians and student to submit schedules they have built for Counselor approval. Figure 29 shows the Submit Classes Entity Configuration screen. Table 28 describes the option on this screen.

Figure 29 - Submit Classes Entity Configuration screen

Option	Description
Allow Guardian / Student to schedule courses previously passed	Guardians and students can add courses that students completed and earned passing grades to their schedules.

Table 28 - Description of Submit Classes Entity Configuration option

## Configuring Online Registration

Online Registration allows the district to designate a time frame by Entity in which guardians are allowed to review district-defined information for accuracy and request changes. Guardians can add a Food Service Application, complete a district-defined Custom Form, visit a third-party website, and verify their student's Ethnicity/Race and student information.

If your district uses Online Registration, this section explains how you can configure when it is available in Family and Student Access. This section also explains what you can include in Online Registration.



To configure Online Registration:

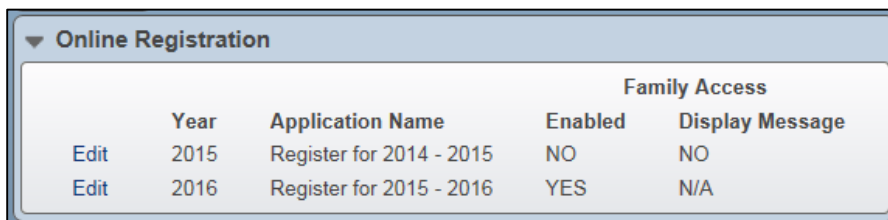
1. Do one of the following:
  - Go to Student Management\Families\FM Setup\CF\EC.
  - Go to Student Management\Students\SA Setup\CF\EC.

---

**Note** Both Family Access and Student Access options can be enabled from either location.

---

2. Expand Online Registration.
3. Click Edit to the left of the Year (Figure 30).
4. Configure the Register for [School Year] Entity Configuration screen (Figure 31). Table 29 describes the options on this screen.
5. Click Save.



▼ Online Registration		Family Access		
	Year	Application Name	Enabled	Display Message
Edit	2015	Register for 2014 - 2015	NO	NO
Edit	2016	Register for 2015 - 2016	YES	N/A

Figure 30 - Online Registration screen to enable a specific school year

**Register for 2015 - 2016 Entity Configuration**

Entity: 401 Section and Application: Online Registration -- Register for 2015 - 2016

**Guardian Options**

Disable Application

Do Not Display Button

Display Button and Message

Start Online Registration on: 05/18/2015 Monday

End Online Registration on: 06/12/2015 Friday

Rename "Online Registration" in Family Access to:

Keep Online Registration Open past the End Date for Individual Students

Do Not Display Online Registration for Students in specific grade levels

Allow limited access to Online Registration for Guardians in non-primary Families 

Do Not Display Online Registration for Students who are Inactive in Entity 401 and School Year 2016

Do Not Display Online Registration for Students who were enrolled via NSOE for School Year 2016

Enter a free form message that will display on the Online Registration screen

Welcome to Online Registration for the 2015-16 School Year!

Free Form Message Label: District Message

Hide Free Form Message on Navigation Menu

Always start on Free Form Message when entering Online Registration

Allow Guardians to email questions/concerns while Online Registration is open

Contact's Email Address: \*All emails from guardians will be sent to this email address.

Email confirmation to all guardians in the Primary Family when Online Registration is completed

Email Body:

Step Completion Buttons:  Complete Step # Only  Complete Step # and move to Step #  Both

Enter Steps (in order) needed for Primary Family to register a student online

Step 1: --Select a Step-- Label:  Optional Step?

Include All Schools   Include All Grades

**Figure 31 - Register for [School Year] Entity Configuration screen**

Option	Description
Start Online Registration on:	Date Online Registration is available to guardians.
End Online Registration on:	Date Online Registration is no longer available to guardians.
Rename "Online Registration" in Family Access to:	Allows you to rename the feature.
Keep Online Registration Open past the End Date for Individual Students	Allows you to select specific students for whom Online Registration will remain open after the End Date.

Option	Description
Do Not Display Online Registration for Students in specific grade levels	Suppresses Online Registration for students in the grade levels selected.
Allow limited access to Online Registration for Guardians in non-primary Families	Grants read only access to Online Registration for guardians of non-primary families. Based on Field Setup, guardians can have access to request changes to their own family's information and add Emergency Contacts.
Do Not Display Online Registration for Students who are Inactive in Entity [###] and School Year [#####]	Prevents Online Registration from appearing to inactive students in the Entity for the current School Year.
Do Not Display Online Registration for Students who were enrolled via NSOE for School Year [#####]	Prevents Online Registration from appearing to students who were enrolled via New Student Online Enrollment for the School Year listed.
Enter a free form message that will display on the Online Registration screen	Allows you to set up a message that displays on the Online Registration screen. Typically, this message explains to guardians what Online Registration is and what they are to do.
Allow Guardians to email questions/concerns while Online Registration is open	Determines whether a guardian can submit an email to a defined contact if they have any questions while completing Online Registration.
Contact's Email Address	<p>Identifies the email address to which guardians' questions are sent.</p> <p><b>Note:</b> This field is accessible only when Allow Guardians to email questions/concerns while Online Registration is open is selected.</p>
Email confirmation to all guardians in the Primary Family when Online Registration is completed	Sends an email to all guardians of the Primary Family when Online Registration is completed. You compose the text of the email that is sent in the Email Body field.

Option	Description
Enter Steps (in order) needed for Primary Family to register a student online	<p>Sets up the steps that guardians need to respond to as they complete the Online Registration. There are several possible Step options to select from:</p> <ol style="list-style-type: none"> <li>1. Add a Food Service Application</li> <li>2. Child Care Enrollment</li> <li>3. Custom Form</li> <li>4. Embedded Link</li> <li>5. Link</li> <li>6. Make a Fee Payment</li> <li>7. Make a Food Service Payment</li> <li>8. Verify Ethnicity/Race</li> <li>9. Verify Skylert Information</li> <li>10. Verify Student Information</li> </ol> <p><b>Note:</b> Some options may not be available, depending on your district's configuration.</p>
Label	Allows you to customize the text of the Label displayed for the selected Step.
Enter a free form message that will display above this step	This option is available after you select a Step option. It allows you to compose a message that explains the step to the guardian. This option is available for all Step options.
Allow Primary Family to select a T-Shirt Size for Child	Available only when Childcare Enrollment is selected from the Step options. Allows a guardian in the Primary family to enter a t-shirt size for a child enrolled in a Childcare program.
Select a Custom Form	Available only when Custom Form is selected from the Step options. Allows you to select the Custom Form you want guardians to complete.
URL	Available only when Embedded Link or Link is selected from the Step options. Allows you to enter the URL to the third-party website you want the guardian to visit.

Option	Description
Preview Letter   Edit Letter	Allows you to preview the Ethnicity/Race Validation Form Letter. You can also edit the text of the letter to customize the text to reflect your district's policies.
Set Validation to:	Determines whether Ethnicity and Race updates are immediately updated in the database or are listed in the Pseudo Changes queue for designated staff to approve before they are updated in the database.
Setup Fields for Primary Family to modify	<p>Available only when Verify Student Information is selected from the Step options. Click Setup Fields to grant Primary Families access to request changes to their student's general information when Online Registration is open. Primary Families can be allowed to request changes to the following areas:</p> <ul style="list-style-type: none"> <li>• Student Information</li> <li>• Family Information</li> <li>• Alert/Emergency Information</li> <li>• Emergency Contracts</li> <li>• Health Information</li> </ul> <p>When you select an area, a list of fields display that you can set to Auto-Approve, Approval Needed, Read-Only or Hide.</p> <p><b>Note:</b> If Allow limited access to Online Registration for Guardians in non-primary Families is selected, non-Primary Families also have access to request changes to their Family Information and request new Emergency Contacts based on the access granted to the Primary Family.</p>
Optional Step?	Determines whether this step is required or optional. When a step is not marked as Optional, a guardian must complete the step before they can move on to the next step.

Option	Description
Include All Schools Select Schools	Allows you to select whether individual steps in Online Registration are available to all schools in the Entity, or only specific schools.
Include All Grades Select Grade Levels	Allows you to select whether individual steps in Online Registration are available to students in all grade levels, or only specific grade levels.
Add Another Step	Allows additional steps to be added to Online Registration for the guardian to respond to.  <b>Note:</b> You can include a maximum of 20 Steps.

Table 29 - Description of options on the Register for [School Year] Entity Configuration screen

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<b>Note</b>	If you are using Skylert, Verify Skylert Information is available in the Step options.
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## Configuring Online Forms

The Online Forms application allows your district to use Custom Forms to gather information or input from guardians or students. For example, you may have an Acceptable Use Policy that guardians need to provide to permit their students have access to the Internet at school. You can include a Custom Form as part of Online Registration or as an Online Form. You may want to make it available using Online Forms if the dates during which the form is available are different than those used in Online Registration.

Options on the Online Form Configuration screen (Figure 32) are similar to those options available in Online Registration. To learn more about these options, see [“Configuring Online Registration”](#) (page 67). Table 30 describes the options that are unique to the Online Form Configuration screen.

**Figure 32 - Options on the Online Form Configuration screen**

Option	Description
Allow All Families to fill out Form	Makes the form available to all guardians in all of a student’s families.
Limit Form to Primary Family Only	Makes the form available to guardians in a student’s Primary Family only.
Name	Name of the form.
Enter a free form message that will display on the Online Form	Allows you to describe the form and what you want the guardian or student to do with the form.

Option	Description
Free Form Message Label:	Appears above the free form message you have configured.
Hide Free Form Message on Navigation Menu	When the guardian or student clicks the Online Forms tab in Family or Student Access, the free form message does not appear in the popup window.
Always show Free Form Message when entering Online Form	If the user completes at least one step in the Online Form and then exits the form and returns to it later, the free form message is displayed and the user must navigate to the next step in the Online Form.
Start Online Form on:	Date the Online Form becomes available in Family or Student Access.
End Online Form on:	Date the Online Form is no longer available in Family or Student Access.
Keep Online Form Open past the End Date for Individual Students	Allows the selection of individual students for whom the Online Form will be available past the end date.
Do Not Display Online Form for Students in specific grade levels	Allows you to exclude specific grade levels from accessing the entire Online Form.
Do Not Display Online Form for Students who are Inactive in Entity ###	Prevents students who are inactive in the Entity from accessing the Online Form.
Do Not Display Online Form for Students who were enrolled via NSOE for School Year	Prevents the Online Form from appearing to students who were enrolled via New Student Online Enrollment for the School Year.
Email confirmation when Online Form is completed	Select to send an email to the student or guardian after they complete an Online Form. When this option is enabled, you can configure the text of the Email Body or use the default text.



Option	Description
Step Completion Buttons:	<p>Allows you to specify the text displayed on the buttons that users click to complete a step. There are three options to select from:</p> <ul style="list-style-type: none"> <li>• Complete Step # Only</li> <li>• Complete Step # and move to Step #</li> <li>• Both</li> </ul>
Enter Steps (in order) needed to complete this Online Form	<p>Sets up the steps that guardians need to respond to as they complete the Online Form. There are three Step options to select from:</p> <ul style="list-style-type: none"> <li>• Custom Form</li> <li>• Embedded Link</li> <li>• Link</li> </ul>
Label	<p>Allows you to customize the text of the Label displayed for the selected Step.</p>
Enter a free form message that will display above this step	<p>This option is available after you select a Step option. It allows you to compose a message that explains the step to the guardian. This option is available for all Step options.</p>
Select a Custom Form	<p>Available only when Custom Form is selected from the Step options. Allows you to select the Custom Form you want guardians to complete.</p>
URL	<p>Available only when Embedded Link or Link is selected from the Step options. Allows you to enter the URL to the third-party website you want guardians to visit.</p>
Optional Step?	<p>Determines whether this step is required or optional. When a step is not marked as Optional, guardians must complete the step before they can move on to the next step.</p>
Add Another Step	<p>Allows additional steps to be added for guardians to complete.</p> <p><b>Note:</b> You can include a maximum of 20 Steps.</p>

Option	Description
Include All Schools Select Schools	Allows you to select whether individual steps in the Online Form are available to all schools in the Entity, or only specific schools.
Include All Grades Select Grade Levels	Allows you to select whether individual steps in the Online Form are available to all grade levels in the Entity, or only specific grade levels.

Table 30 - Description of options unique to the Online Forms Configuration screen

## Configuring Online Assignments

The Online Assignments application allows students to complete and guardians to view Gradebook Assignments that teachers have posted for their classes. To learn more about Online Assignments, see the *WSIPC Guide to Online Assignments*. There are no configuration options for this application.

---

<b>Note</b>	Students who are their own Guardians will not have access to Online Assignments unless this is enabled in the Guardian Options area.
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# Disabling an Application

There are times when you may need to disable an application. For example, you may want to disable the Teacher Conferences application until it is time to schedule conferences.

To disable an application:

1. Do one of the following:

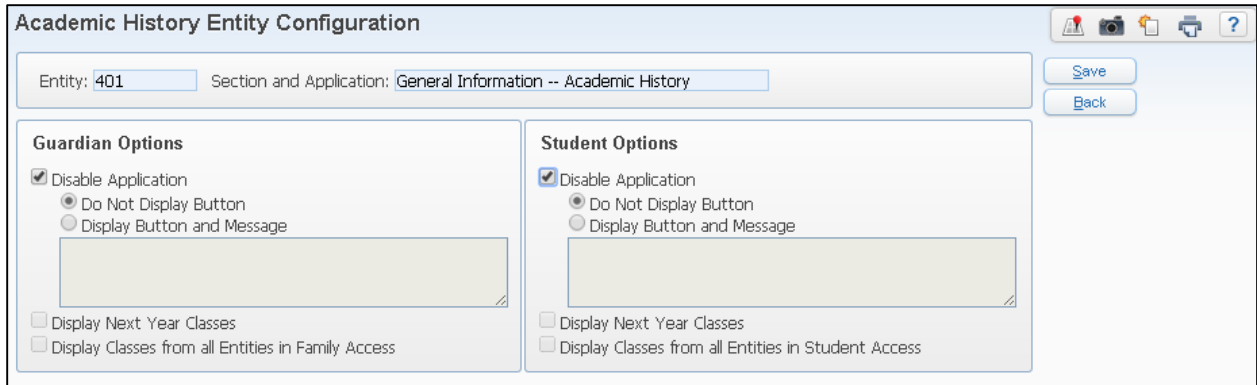
- Go to Student Management\Families\FM Setup\CF\EC.
- Go to Student Management\Students\SA Setup\CF\EC.

---

<b>Note</b>	Both Family Access and Student Access options can be disabled from either location.
-------------	---

---

2. Expand the General Information heading.
3. Click Edit next to the application you want to disable.
4. Select Disable Application in the Guardian Options area to disable the application for guardians or in the Student Options area to disable it for students.
5. Select Do Not Display Button or Display Button and Message. Figure 33 shows an example of the Academic History Entity Configuration screen with Do Not Display Button option selected. Table 31 describes the two options on this screen.
6. Click Save.



**Figure 33 - Example of the Disable Application options on the Academic History Entity Configuration screen**

Option	Description
Do Not Display Button	Hides the application from view.
Display Button and Message	Shows the application. However, users can't access the application. Instead, the message you type appears.

**Table 31 - Description of the Disable Application options**

# Configuring District Settings

There are six district settings that affect Family and Student Access. District settings allow you to perform the following tasks:

- [Configuring District User Settings](#)
- [Configuring District Display Settings](#)
- [Configuring District Application Settings](#)
- [Configuring District Links](#)
- [Configuring Security](#)
- [Directing Where Guardians and Students Go After Signing In](#)

This section discusses each of these tasks.

## Configuring District User Settings

There are multiple user settings that your district must define for Family and Student Access. For example, will you allow guardians to change their user name or email address? District User Settings affect all Family Access and Student Access users in the District.

To configure District user settings:

1. Do one of the following:
  - Go to Student Management\Families\FM Setup\CF\DU.
  - Go to Student Management\Students\SA Setup\CF\DU.

---

<b>Note</b>	You can configure both Guardian and Student settings from either location.
-------------	--

---

2. Configure the District User Settings screen (Figure 34). Table 32 describes each option on this screen.
3. Click Save.

**District User Settings**

**District User Settings**

**Guardian Users**

Can change Login

Can change email address

Can change 'From' email address when sending emails

Require a separate Family Access login and password for staff members (maintained in Account Information)

Show the Family Access Alias setup screen after the login process

Allow Guardians to change email address of all guardians in their Family [?](#)

Allow Guardians to Subscribe to Food Service Low Balance E-mails

Low Balance Amount: \$   Do not check for Current Year Purchase/Payment Activity [?](#)

Use Student's Home Email Address    Use Student's School Email Address

**Student Users**

Can change Login

Can change email address

Can change 'From' email address when sending emails

[Save](#)

[Back](#)

**Figure 34 - District User Settings screen**

Option	Description
Can change Login	Allows students or guardians to change their Login to Family and Student Access. This option will update their Login in the District database.
Can change email address	Allows students or guardians to change their email address. This option updates their email address in the district database.
Can change 'From' email address when sending emails	<p>Allows students or guardians to change the “From” email address when they send an email from Family and Student Access to a staff member. Otherwise, the “From” email address is the student’s or guardian’s email address on record.</p> <p>This option takes effect only if the Make email links open Skyward email program instead of external program check box is also selected (Product Setup\Skyward Contact Access\DS\CF\WC). This is a district-wide option.</p>
Require a separate Family Access login and password for staff members (maintained in Account Information)	Allows guardians who are also employees or secured users to set up an alias login so that they can access Family Access without sharing their secured access (such as Teacher Access or Employee Access).
Show the Family Access Alias setup screen after the login process	Allows guardians who are also employees or secured users to set up alternate login credentials to access Family Access without sharing their secured access (such as Teacher Access or Employee Access).

Option	Description
Allow Guardians to change email address of all guardians in their Family	Allows guardians to change the email address of other guardians in the Family.
Allow Guardians to Subscribe to Food Service Low Balance Emails	<p>Allows guardians to decide whether or not they want to receive an email when their student's Food Service balance reaches a district-defined low balance level.</p> <p><b>Note:</b> You can edit the Start Time on the Scheduled Task named End of the Day Food Service Low Balance Alert to Family Subscriber List to change the time when the system generates the Food Service Low Balance email (Product Setup\System Administration\PQ\ST).</p>
Do Not Check for Current Year Purchase/Payment Activity	If a Payor's account balance is below the Low Balance Amount, but not zero, current year Purchases and Payments will not be checked when determining whether or not an email should be sent.
Use Student's Home Email Address	Defines the student's home email address as the default for emails sent through the system.
Use Student's School Email Address	Defines the student's school email address as the default for emails sent through the system.

**Table 32 - Description of District User Settings options**

## Configuring District Display Settings

There are several display options that are controlled at the district level. District display settings affect settings in Family and Student Access as well as Student Management.

To configure the district display settings:

1. Do one of the following:

- Go to Student Management\Students\SA Setup\CF\DD.
- Go to Student Management\Families\FM Setup\CF\DD.

---

**Note** Display settings for both Family and Student Access can be managed from either access point.

---

2. Configure the District Display Settings screen (Figure 35). Table 33 describes each option on this screen.

3. Click Save.

**District Display Settings**

**Student Settings**

Student Selection Types:

Only Display Students to Custodial Guardians ?

Only Display Non-Graduated Students

Number of days past Graduation a Student will be displayed:

Display Withdrawn Entities if a Student was Enrolled for at least  school days in the Current School Year ?

**District Settings**

Display link to Teacher's website on Family Access Gradebook & Schedule screens

Display AUP (Acceptable Use Policy) on Web Access screens in Student Management

Display Guardian and Student's Permission, Login, and Password in Student Management

Allow Users to Translate Family Access into Other Languages ?

Translator Meta Tag (Optional):

Disable User and Module Tracking (Only Login History will be Tracked) ?

Number of days of Login History to display:

Auto-Logout from Inactive Time:

Auto-Logout from Time on Single Page:

Rename Portfolio for Family/Student Access to:

**Wall Profile Picture**

**District** ?

Default Picture:  Default icon  Custom picture

**Guardians**

Allow upload of a custom picture

Resize images/graphics prior to upload so they do not exceed  in height and  in width

Image Quality:  ? \* Resize will only occur if the resized file size is less than the original file size

Default picture:  Default icon  Custom picture

**Teachers / Advisors / Activity Leaders**

Allow use of Staff picture

Allow upload a custom picture

Resize images/graphics prior to upload so they do not exceed  in height and  in width

Image Quality:  ? \* Resize will only occur if the resized file size is less than the original file size

Default picture:  Default icon  Staff picture  Custom picture

Figure 35 - District Display Settings screen



AREA	PURPOSE OF AREA
Student Settings	Contains settings that pertain to which students should be shown in Family Access.
Options in this Area	Description of Options
Student Selection Types:	Determines whether only Active students appear in Family Access, or whether both Active and Inactive students appear. This option only affects guardian users.
Only Display Students to Custodial Guardians	Guardians will only see students for whom they have been marked as a Custodial Guardian on the Family tab of the Student profile.
Only Display Non-Graduated Students	<p>Shows information for non-graduated students in Family Access. This option causes students to be denied access to Student Access as soon as the Graduated flag is set to Yes. It also governs the ability of guardians to view information for their graduated students.</p> <p><b>Note:</b> If there is a Graduated Date but the Graduated flag is set to No, the student still has access.</p>
Number of days past Graduation a Student will be displayed:	<p>The number of days beyond a student's graduation date that he or she can still sign in to Student Access.</p> <p><b>Note:</b> This also applies to how long a guardian can see the graduated student's information after the student graduates.</p>

Options in this Area	Description of Options
<p>Display Withdrawn Entities if a Student was Enrolled for at least ## school days in the Current School Year</p>	<p>When a student is enrolled in multiple Entities during the current school year, but is inactive at one of the Entities, this option allows current year information from the inactive Entity to display only if the student was enrolled at least a specified number of school days before being withdrawn.</p> <p><b>Note:</b> This option does not apply to graduated students.</p>
AREA	PURPOSE OF AREA
<p>District Settings</p>	<p>Contains settings that apply to Family Access for all users in the district.</p>
Options in this Area	Description of Options
<p>Display link to Teacher's website on Family Access Gradebook &amp; Schedule screens</p>	<p>Shows a link on the Family Access Gradebook and Schedule screens to the teacher's website. To learn more about configuring a teacher's staff record to include their website information, see the <i>WSIPC Guide to Staff</i>.</p>
<p>Display AUP (Acceptable Use Policy) on Web Access screens in Student Management</p>	<p>Shows Approved/Not Approved on the Web Access sub tab of the General tab in Student Profile. Reflects whether or not the Acceptable Use Policy has been accepted by the guardian/student.</p> <p><b>Note:</b> This option does not affect the information viewed from within Family and Student Access.</p>
<p>Display Guardian and Student's Permission, Login, and Password in Student Management</p>	<p>Shows student and guardian credentials accessed on the Web Access sub tab of the General tab in Student Profile.</p> <p><b>Note:</b> This option does not affect information viewed from within Family and Student Access.</p>

Options in this Area	Description of Options
Allow Users to Translate Family Access into Other Languages	<p>Determines whether Family Access users can use language translating functionality provided by Google.</p> <p><b>Note:</b> If you enable this feature, guardians and students will have an option in their My Account settings to Show Google Translator in Family Access. When they select this option, they will see the Google Translator selection box in the Student Information header of their screen immediately below the My Account link.</p>
Disable User and Module Tracking (Only Login History will be Tracked)	Determines whether each module accessed by a guardian or student is logged or login history only.
Number of Days of Login History to display	The number of days of Login History that a student or guardian can view in Family and Student Access.
Auto-Logout from Inactive Time	Determines when a Family or Student Access user is logged out because of screen inactivity for the specified number of minutes.
Auto-Logout from Time on Single Page	Determines when a Family or Student Access user is logged out when they remain on the same page for the specified number of minutes.
Rename Portfolio for Family/Student Access to:	Allows you to enter a district-defined value to describe the Portfolio application. The Portfolio application is where guardians and students can view information such as report cards, attendance letters, and Data Mining reports.

AREA	PURPOSE OF AREA
Wall Profile Picture	Allows you to define pictures and images that are displayed in Family and Student Access.
Options in This Area	Description of Options
District Default Picture	Allows you to define the District image that is used for all Admin Message Center posts. You can choose between a Default icon or upload a Custom picture.
Guardians Allow upload of a custom picture	Determines whether or not you will Allow upload of a custom picture for guardians. Allows you to resize the image or graphic prior to uploading. Also allows you to choose the Image Quality.
Guardians Default picture	You can choose between a Default icon or upload a Custom picture.
Teachers / Advisors / Activity Leaders Allow use of Staff picture	Determines whether you Allow use of Staff picture.
Teachers / Advisors / Activity Leaders Allow upload of a custom picture	Determines whether the Staff picture or a custom picture will be used for teachers, advisors, or activity leaders. Allows you to resize the image or graphic prior to uploading. Also allows you to choose the Image Quality.
Teachers / Advisors / Activity Leaders Default picture	You can choose between a Default icon, a Staff picture or upload a Custom picture.

**Table 33 - Description of District Display Settings options**

## Configuring District Application Settings

District Application Settings allow you to determine, as a district standard, how much detail is available in certain applications. Each Entity determines whether or not to enable the application for that Entity's families and students. You can perform the following tasks in District Application Settings:

- [Configuring the Family Access Login Screen](#)
- [Configuring Discipline](#)
- [Configuring Food Service](#)
- [Configuring Fee Management](#)
- [Configuring Ethnicity and Race Validation](#)
- [Configuring Health Information](#)
- [Configuring School Directory](#)
- [Configuring Health Types](#)

This section describes each of these tasks.

To configure District Application Settings:

1. Go to Student Management\Families\FM Setup\CF\DA.
2. Configure the areas on the District Applications Settings screen (Figure 36). Each area and its options are described in the sections below.
3. Click Save.

### District Application Settings

---

#### Family Access Login Screen

Link To Run:

Turn off Family Access for all users in the District
  Turn off Student Access for all users in the District

---

#### Discipline

Display Comments in Discipline  
 Display Current Year Offenses for Selected Entity  
 Display Discipline Action Status  
 Hide Discipline Record Until Action Is Assigned  
 Display only Discipline Offenses

#### Food Service

Allow all non-payers to see purchases only  
 Allow members of payors family to view account info, payments, and purchases  
 Allow Guardians to view information when students are their own Food Service payors  
 Allow online payments through **Student Access**

---

#### Fee Management

Allow members of payor's family to view information
  Allow Guardians to view information when students are their own Fee Management payors

---

#### Ethnicity and Race Validation [Preview Letter](#) | [Edit Letter](#)

Allow Primary Guardians to validate their child's Ethnicity and Race \*This will be entered as pseudo approval request within Pseudo Family Access Changes.  
 Set Validation to:  Auto-Approve  Approval Needed

---

#### Health Information

Display Selected Health Options for:

Display Vaccinations  
 Display Student's Compliance for Vaccinations

#### School Directory

Do Not Allow guardians/students to view Entire District

---

#### Health Types

Display Health Types  Display Voiced Health Records  Display Inactive Health Conditions  Only show most recent health note  
 Display BMI Percentile  Only show most recent injury detail comment  Only Display Active IHP Forms

Display in Family Access	Type ID	Type Description	Show Notes
<input checked="" type="checkbox"/>	CON	Health Conditions	<input type="checkbox"/>
<input checked="" type="checkbox"/>	DEN	Dental records	<input type="checkbox"/>
<input checked="" type="checkbox"/>	DIS	Disabilities	<input type="checkbox"/>
<input checked="" type="checkbox"/>	HEA	Hearing Test	<input type="checkbox"/>
<input checked="" type="checkbox"/>	HOV	Office Visit	<input type="checkbox"/>
<input checked="" type="checkbox"/>	IHP	Individual Health Plan	<input type="checkbox"/>
<input checked="" type="checkbox"/>	ILL	Childhood Illnesses	<input type="checkbox"/>
<input checked="" type="checkbox"/>	INJ	Injuries	<input type="checkbox"/>
<input checked="" type="checkbox"/>	MED	Medications	<input type="checkbox"/>
<input checked="" type="checkbox"/>	PHY	Physical	<input type="checkbox"/>
<input checked="" type="checkbox"/>	SCO	Scoliosis	<input type="checkbox"/>
<input checked="" type="checkbox"/>	TES	Health Tests	<input type="checkbox"/>

Figure 36 - District Application Settings screen

## Configuring the Family Access Login Screen

The District Application Settings for Family Access (Figure 37) provide a quick way to turn off or turn on all access to Family and/or Student Access. Table 34 describes the options in this area.

Figure 37 - District Application Settings options for the Family Access Login Screen area

Option	Description
Turn off Family Access for all users in the District	<p>Disables Family Access for all users. This may be helpful if you do not want guardians to sign in to Family Access during the summer.</p> <p>Turning Family Access off here does not include an option to automatically re-enable Family Access on a given date. To learn more about this feature, see <a href="#">“Enabling an Entity to use Family Access or Student Access”</a> (page 6).</p>
Turn off Student Access for all users in the District	<p>Disables Student Access for all users. This may be helpful if you do not want students to sign in to Student Access during the summer.</p> <p>Turning Student Access off here does not include an option to automatically re-enable Student Access on a given date. To learn more about this feature, see <a href="#">“Enabling an Entity to use Family Access or Student Access”</a> (page 6).</p>

Table 34 - Description of the District Application Settings for the Family Access Login Screen area

## Configuring Discipline

The District Application Settings for Discipline (Figure 38) determine what information your district’s business practice will permit to be displayed. Each Entity has the option whether or not to open the Discipline application to their families and students. Table 35 describes the Discipline District Application Setting options.

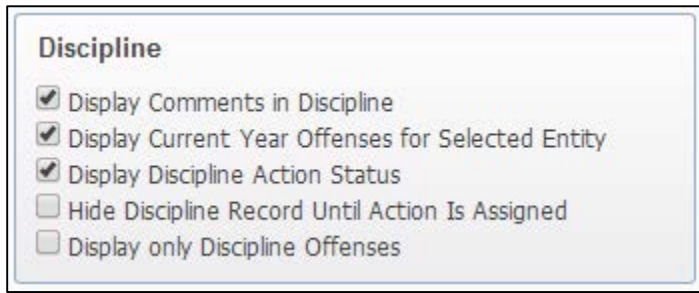


Figure 38 - District Application Settings options for the Discipline area

Option	Description
Display Comments in Discipline	Determines whether or not Comments on a Discipline record display.
Display Current Year Offenses for Selected Entity	Prevents Offenses from prior years from displaying.
Display Discipline Action Status	Allows the Status of an Action to display. For example if the Action on an Offense is a Detention do you want to display whether or not it has been marked as Served.
Hide Discipline Record Until Action Is Assigned	Prevents an Offense record from displaying until an Action has been assigned.
Display only Discipline Offenses	Prevents Referrals from displaying.

Table 35 - Description of the District Application Settings for the Discipline area



## Configuring Food Service

The District Application Settings for Food Service (Figure 39) determine what information your district’s business practice will permit to be displayed. Each Entity has the option whether or not to open the Food Service application to their families and students. Table 36 describes the options in this area.

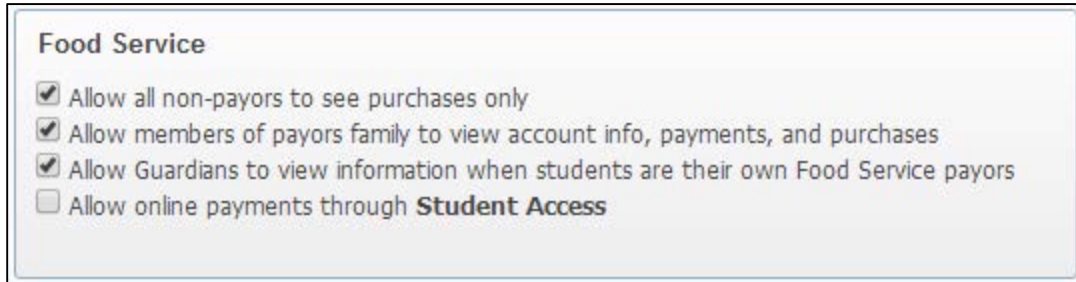


Figure 39 - District Application Settings options for the Food Service area

Option	Description
Allow all non-payors to see purchases only	Allows non-payors to view purchases. Select this option when students are their own payors to allow guardians to view what their student has purchased.
Allow members of payors family to view account info, payments, and purchases	Allows members of the payor’s family to view account information. Select this option when students are their own payors to allow guardians to view all Food Service information for their student.  <b>Note:</b> This option is superseded when Allow Guardians to view information when students are their own Food Service Payors is selected.
Allow Guardians to view information when students are their own Food Service Payors	Allows guardians to view all Food Service information for their students when students are their own payor.
Allow online Payments through Student Access	Permits students to make online payments to their Food Service accounts through Student Access.

Table 36 - Description of the District Application Settings for the Food Service area

## Configuring Fee Management

The District Application Settings for Fee Management (Figure 40) determine what information your district’s business practice will permit to be displayed. Each Entity has the option whether or not to open the Fee Management application to their families and students. Table 37 describes the options in this area.

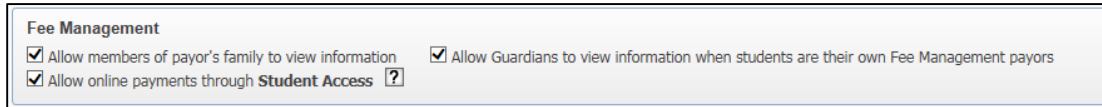


Figure 40 - District Application Settings options for the Fee Management area

Option	Description
Allow members of payor’s family to view information	Allows family members to view Fee Management information when the student is the payor.
Allow Guardians to view information when students are their own Fee Management payors	Allows guardians to view Fee Management information when the student is the payor.
Allow online payments through Student Access	Permits students to make online payments of fees through Student Access.

Table 37 - Description of the District Application Settings for the Fee Management area

## Configuring Ethnicity and Race Validation

The District Application Settings for Ethnicity and Race Validation (Figure 41) determine what information your district’s business practice will permit to be displayed. Each Entity has the option whether or not to open the Ethnicity and Race Validation application to their families and students. Table 38 describes the options in this area.

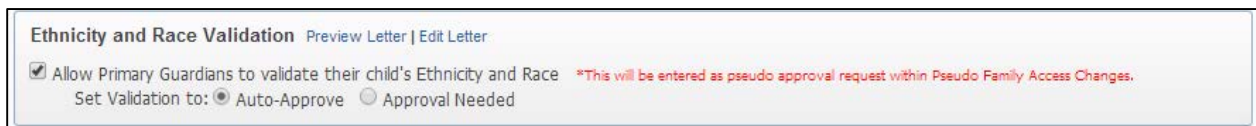


Figure 41 - District Application Settings options for the Ethnicity and Race Validation area

AREA	PURPOSE OF AREA
Ethnicity and Race Validation	Defines the Ethnicity/Race Validation letter and the validation settings. Allows Primary Guardians to validate the Ethnicity and Race for their students.
Options in This Area	Description of Options
Preview Letter Edit Letter	Allows you to preview the Ethnicity/Race Validation Form Letter. You can also edit the text of the letter and customize the text to reflect your district's policies.
Allow Primary Guardians to validate their child's Ethnicity and Race	Enables the Ethnicity/Race application.
Set Validation to:	Determines whether Ethnicity and Race updates are immediately updated in the database, or are listed in the Pseudo Changes queue for designated staff to approve before they are updated in the database.

Table 38 - Description of the District Application Settings for the Ethnicity and Race Validation area

## Configuring Health Information

The District Application Settings for Health Information (Figure 42) determine what information your district's business practice will permit to be displayed. Table 39 describes the options in this area.

---

**Note** If your district allows Health Information to be displayed, the Entity does not have the option to disable Health Information for their families and students.

---

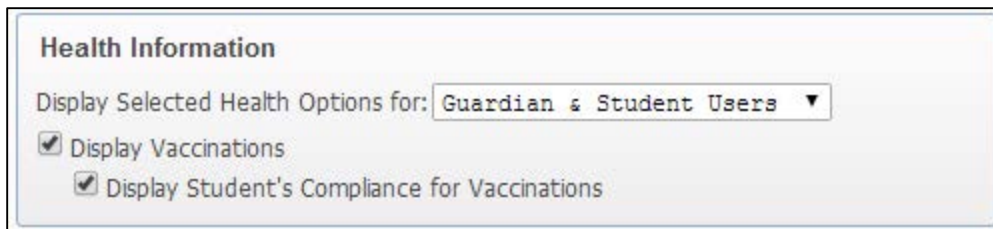


Figure 42 - District Application Settings options for the Health Information area

Option	Description
Display Selected Health Options for:	Determines who can view the selected Health options (Guardian Users, Student Users, or Guardian & Student Users).
Display Vaccinations	Shows a student's Vaccination information.
Display Student's Compliance for Vaccinations	Shows why a student is not in compliance for a vaccination.

Table 39 - Description of the District Application Settings for the Health Information area

## Configuring School Directory

The District Application Settings for School Directory (Figure 43) determine what information your district's business practice will permit to be displayed. Each Entity has the option whether or not to open the School Directory Application to their families and students. Table 40 describes the options in this area.

**School Directory**

Do Not Allow guardians/students to view Entire District

Figure 43 - District Application Settings options for the School Directory area

Option	Description
Do Not Allow guardians/students to view Entire District	Limits guardians and students from viewing School Directory information for students and families who are not enrolled in their Entity.

Table 40 - Description of the District Application Settings for the School Directory area

## Configuring Health Types

The District Application Settings for Health Types (Figure 44) determine what information your district's business practice will permit to be displayed. Health Types is controlled at the district level. Table 41 describes the options in this area.

**Health Types**

Display Health Types   
  Display Voided Health Records   
  Display Inactive Health Conditions   
  Only show most recent health note  
 Display BMI Percentile   
  Only show most recent injury detail comment   
 Only Display Active IHP Forms

Display in Family Access	Type ID	Type Description	Show Notes
<input checked="" type="checkbox"/>	CON	Health Conditions	<input type="checkbox"/>
<input checked="" type="checkbox"/>	DEN	Dental records	<input type="checkbox"/>
<input checked="" type="checkbox"/>	DIS	Disabilities	<input type="checkbox"/>
<input checked="" type="checkbox"/>	HEA	Hearing Test	<input type="checkbox"/>
<input checked="" type="checkbox"/>	HOV	Office Visit	<input type="checkbox"/>
<input checked="" type="checkbox"/>	IHP	Individual Health Plan	<input type="checkbox"/>
<input checked="" type="checkbox"/>	ILL	Childhood Illnesses	<input type="checkbox"/>
<input checked="" type="checkbox"/>	INJ	Injuries	<input type="checkbox"/>
<input checked="" type="checkbox"/>	MED	Medications	<input type="checkbox"/>
<input checked="" type="checkbox"/>	PHY	Physical	<input type="checkbox"/>
<input checked="" type="checkbox"/>	SCO	Scoliosis	<input type="checkbox"/>
<input checked="" type="checkbox"/>	TES	Health Tests	<input type="checkbox"/>

**Figure 44 - District Application Settings for the Health Types area**

Option	Description
Display Health Types	Shows Health Types. If enabled, you can select which of the 14 Health Type records you want to display in Family and Student Access.
Display BMI Percentile	Shows the student’s BMI percentile (Body Mass Index) when height and weight are entered in the Health module on a Physical record. This option is available only when the Health Type of Physical is selected.
Display voided Health Records	Shows health records that have been voided.
Only show most recent injury detail comment	If there are multiple comments on an Injury record, this option hides all but the most recent comment.
Display Inactive Health Conditions	Shows health conditions that have been marked as Inactive.
Only Display Active IHP Forms	Prevents inactive Individual Health Plan (IHP) forms from displaying.
Only show most recent health note	Hides all Health Notes except the most recent one.

**Table 41 - Description of the District Application Settings for the Health Types area**

# Configuring District Links

District Links are hyperlinks you can add to Family and Student Access that direct the user to another website. For example, your district may want to add a link to the district homepage and a link to the teacher’s class website. You can display your District Link information as an icon, text, or both.

To configure District Links:

1. Do one of the following:
  - Go to Student Management\Families\FM Setup\CF\DL.
  - Go to Student Management\Students\SA Setup\CF\DL.

---

**Note** The District Link settings for both Family and Student Access can be managed from either access point.

---

2. Click Add and configure the District Link Maintenance screen (Figure 45). Table 42 describes the options on this screen.
3. Click Save.

**District Link Maintenance**

District Link Maintenance

\* Order:

\* URL:

Icon:  none

\* Link Text:

Description:

**Display Options**

\* Entity:   
201 - WSIPC Middle School  
401 - WSIPC High School  
407 - Entity (407)  
499 - Entity (499)

Display this link in Family Access  Display this link in Student Access

Allow District Link to access internal Student Id from the Skyward database

Once the District Link is clicked, the temporary session record will be deleted in:

Note: This timestamp applies to all district links that access the Skyward internal Student Id

Asterisk (\*) denotes a required field

Figure 45 - District Link Maintenance screen

Option	Description
Order	If there is more than one link, this value determines where in the list this link appears.
URL	The URL that the hyperlink takes the user to.
Icon	Determines whether a Facebook or Twitter icon displays next to the District Link.
Link Text	<p>Defines the text the user sees. For example, if you type “District Home Page,” the user sees this text and not the URL.</p> <p><b>Note:</b> Link Text is not used when an Icon is selected.</p>
Description	The tool tip seen when a user pauses the mouse pointer over the Link Text.
Entities	Identifies which Entities see this link.
Display this link in Family Access	Determines if this link can be seen in Family Access.
Display this link in Student Access	Determines if this link can be seen in Student Access.
Allow District Link to access internal Student ID from the Skyward Database	Allows third-party vendors to access the student’s ID in Skyward’s School Management System.
Once the District Link is clicked, the temporary session record will be deleted in	Determines when the temporary session record between the linked website and Skyward’s School Management System is deleted.

**Table 42 - Description of the District Link Maintenance options**

## Configuring Third-Party Vendor Setup

You may allow guardians to enter Food Service or Fee Management payments using a third-party vendor such as RevTrak or E-Funds. To do this, you must configure Student Management to allow third-party vendor connections.

To configure third-party vendor setup:

1. Go to Product Setup\Skyward Contact Access\ST\CF.
2. Click Vendor Setup and then click Add.
3. Enter a Vendor Name.
4. Select from the following Subsystems options:
  - Fee Management
  - Food Service
  - All
  - None
5. Click the Entity link, select the participating Entities, and click Save.

---

<b>Note</b>	Do not select individual Entities if your staff uses Employee Access to enter payments.
-------------	---

---

6. Enter the Vendor URL provided by the vendor.
7. In the Payment Post URL Override box, enter the URL from your District Login page with the exception of */seplog01.w*.

---

<b>Example</b>	URL from the login page: <a href="https://www2.[ISC].wa-k12.net/scripts/cgiip.exe/WService=w[DISTRICT]71/seplog01.w">https://www2.[ISC].wa-k12.net/scripts/cgiip.exe/WService=w[DISTRICT]71/seplog01.w</a>
----------------	---

In the Payment Post URL Override box enter:  
[https://www2.\[ISC\].wa-k12.net/scripts/cgiip.exe/WService=w\[DISTRICT\]71](https://www2.[ISC].wa-k12.net/scripts/cgiip.exe/WService=w[DISTRICT]71)

---

8. Leave the Image Path as is.



9. In the Payment Interface box, select one of the following:
  - Original.
  - Combined payments through Single Point of Entry (SPE). This option allows guardians to make multiple payments per family in one transaction, and is only available when the Vendor Name is RevTrak.
  - Combined payments through vendor's webstore (XML). This option is not available for all vendors. Your vendor should provide guidance as to whether or not this Payment Interface should be selected.
10. Enter Vendor Security Settings that are provided by the third-party vendor.
11. Click Save on the Add Online Payment Vendor screen.
12. Click Back on the Online Payment Vendors screen.
13. Click Save on the Configuration screen.

## Configuring Security

In Security Configuration, you determine whether users can change their password. This is also where you specify whether or not users can use email to retrieve a forgotten password.

To configure security:

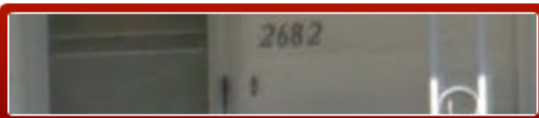
1. Go to Product Setup\Skyward Contact Access\SE Setup\CF\SC.
2. Configure the Security Configuration screen (Figure 46). Table 43 describes the security configuration options that relate specifically to Family and Student Access.
3. Click Save.


### Security Configuration

[Save](#)  
[Back](#)

#### Password Options

- Allow Employee/Secured users to change password
- Allow Guardian users to change password
- Allow Student users to change password
- Display the 'Forgot your Login/Password' link on the login page ?
- Require CAPTCHA when users retrieve a forgotten login/password ?



Type the text  [Privacy & Terms](#)  [Test CAPTCHA](#)

- Force Password Protection for Sky2Go
- Require strong passwords for Family/Student Access users
- Use Case-Sensitive Passwords
- Trust Application Domain Registry ?
- Allow Skyward Support Accounts ?

#### Strong Password Options

Number of Numeric Characters:

Number of Special Characters:

Minimum Password Length:

Number of Passwords Before Reuse:  ?

Number of Days Until Password Expires:   Override Days on Security Groups

Maximum Login Attempts Before Lock:

Email Account Lock Notifications:  Yes

Email Lock Notifications To:

#### Security Options

- Only System Wide users can set System Wide Access flag ?
- Only Allow User Ability to Change Users In Their Entity ?

#### Skyward User Access ?

- Disable Skyward Login
- Web Only

#### Skyward DB User

- Require Skyward Password
- Password:
- Confirm Password:

Figure 46 - Security Configuration screen with options related to Family and Student Access outlined in red

Option	Description
Allow Guardian Users to change password	Allows a guardian to change the district-generated password. All non-district generated passwords are masked.
Allow Student users to change password	Allows a student to change the district-generated password. All non-district generated passwords are masked.
Display the 'Forgot your Login/Password' link on the login page	Displays a link that users can click if they forgot their password. They are prompted to enter their email address. If it matches the one on record, an email is sent to them with their login and a link to reset their password.
Require CAPTCHA when users retrieve a forgotten login/password	Requires users to type the two words displayed in an image when retrieving forgotten login/password.
Require strong passwords for Family/Student Access users	Requires that passwords meet specific requirements. <b>Note:</b> If this option is not selected, none of the strong password options including the Maximum Login Attempts Before Lock are applied to Family or Student Access users.
Strong Password Options	Specifies strong password requirements such as how many numeric characters or special characters a password is required to have, and the maximum number of login attempts before a user is locked out their account.  <b>Note:</b> You must select the Require strong passwords for Family/Student Access users check box for any of these options to be enforced. You must select this option for the Unlock Account button to appear on the Family or Student Access Users screens.

**Table 43 - Description of Security Configuration options related to Family and Student Access**

---

**Note** The Email Account Reset Link and the Mass Email Account Email Link buttons appear on the Family or Student Access Users screen only when the following options are selected:

- Allow Guardian users to change password  
*and/or*
  - Allow Student users to change password  
*and*
  - Display the 'Forgot your Login/Password' link on the login page
- 

## Directing Where Guardians and Students Go After Signing In

Through Web Configuration, your district can determine what guardians and students see when they sign in. You may want to redirect guardians and students to your district's SkyPort dashboard or have them go directly into Family/Student Access.

To direct where guardians and students go after signing in:

1. Go to Product Setup\Skyward Contact Access\DS\CF\WC.
2. Select one of the following:
  - Log them directly into Family/Student Access.
  - Log them into the SkyPort Dashboard.
3. Click Save.

# Managing Permissions and Credentials

A student or a guardian must first have a user name (referred to as a Login) and a password to sign in to Family and Student Access. It's a best practice to designate a staff member at your district or in each Entity to maintain Family and Student Access permissions and credentials. You can assign permissions and credentials to students and guardians individually or in a mass process.

This section discusses the tasks you can perform to manage permissions and credentials for students and guardians.

## Formatting Login Credentials for Students

You can determine the format of the login and password that students and guardians use to sign in to Family and Student Access.

To format login credentials for students:

- Go to Product Setup\Skyward Contact Access\SE Setup\CF\AU\SS.

The Students configuration screen consists of six areas (see Figure 47). Each of these areas and available options is discussed in the sections below.

The screenshot shows the 'Students' configuration interface. At the top, a 'Preview Area' displays sample user information: Sample Login: ayesha, Sample Password: 5bhpzqwj, Sample Email: (empty), Sample Name: Ayesha T Maringsr, Date of Birth: 9/1/1996, and Other ID #: 8479168. Below this are three main configuration sections: 'Define Login Format' (with a dropdown for 'Part 1' set to 'First Name' and a 'Limit to 18 letters' field), 'Define Password Format' (with a dropdown for 'Part 1' set to 'Random Password'), and a column of options including 'Login Options' (with a checkbox for 'Generate in Uppercase'), 'Permission Options' (with a checkbox for 'Automatically Allow Student Access'), and 'Email Options' (with a checkbox for 'Automatically Generate Email Addresses'). Buttons for 'Save', 'Back', and 'Generate Sample User' are also visible.

Figure 47 - Automatically generating student logins, passwords, and email addresses

## Using the Preview Area

The preview area at the top of the screen shows you what the default login and password look like for a sample user. As you define the format to be used for Login and email, the preview area changes to reflect the configuration selections you make.

## Formatting Student Logins

The Define Login Format area (Figure 48) allows you to decide the default format of the login for new students by defining the Parts it is composed of. A *Part* is an element of the login based on a piece of the student's demographic information. For example, Last Name is a Part.

A login can contain up to six Parts. For example, you can choose to have the login contain elements of the student's Last Name, First Name, and Other ID (three Parts).

In the example shown previously in Figure 47, in the Define Login Format area, the login has only one Part: First Name. The preview area at the top of the screen shows you what the default login looks like for a sample user. The sample student's name is Ayesha T. Maringscr, and the Limit to box is set to five letters. Therefore, if this were a new student being enrolled for the first time, her default Login would be "ayesha."

---

**Note** Logins are limited to a maximum of 25 characters.

---

To format student logins:

1. In the Define Login Format area, click the Part 1 dropdown menu arrow and select a Part. Table 44 describes each Part.

---

**Note** As you build your login, the login formatting sample in the preview area of the screen changes to reflect your selections.

---

2. In the Limit to [#] letters box, enter the number of characters to be included in this Part.
3. Click Add New Part if you'd like to add an additional Part to the login.

---

**Note** This option is not available if the last part you added was a tiebreaker, because a tiebreaker can only be used as the last part of a login. Table 44 describes what a tiebreaker is.

---

4. Repeat steps 1 through 3 until you have added all desired Parts (the maximum is six Parts).

---

**Note** To remove a Part, click Remove Last Part.

---

---

**Note** You can click Generate Sample User to generate another sample for review.

---

5. Click Save.

### Define Login Format

Part 1:  Limit to  letters

Figure 48 - Define Login Format area

Part	Description
Last Name	Student's last name or part of the last name. Type the number of characters to be used in the Limit to box. For example, if you type "3" and the student's last name is Smith, then "smi" is used. If the student's last name contains fewer than the specified number of characters, no spaces are added.
First Name	Student's first name or part of the first name. Enter the number of characters to be used in the Limit to box. For example, if you type "3" and the student's first name is Sarah, then "sar" is used. If the student's first name contains fewer than the specified number of characters, no spaces are added.
Middle Name	Student's middle name or part of the middle name. Enter the number of characters to be used in the Limit to box. For example, if you type "3" and the student's middle name is Douglas, then "dou" is used. If the student's middle name contains fewer than the specified number of characters, no spaces are added.
Numeric Birth Year	The student's birth year. You determine whether to use All 4 digits, Last 3 digits, Last 2 digits or the Last digit.  <b>Note:</b> Available only for student logins.
Numeric Birth Month	The student's birth month. You determine whether to use 1 or 2 digits, Always 2 digits or the Last digit only.  <b>Note:</b> Available only for student logins.

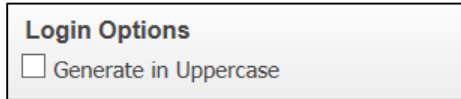


Part	Description
Numeric Birth Day	<p>The student's birth day. You determine whether to use 1 or 2 digits, Always 2 digits or the Last digit only.</p> <p><b>Note:</b> Available only for student logins.</p>
Other ID	<p>The student's Other ID. You determine whether to use the Entire ID or Trim Leading Zeros.</p> <p><b>Note:</b> Available only for student logins.</p>
Text	<p>Freeform text. The same text is used for all new automatically generated logins. Enter text of up to 10 characters.</p>
Name Key	<p>The student's Name Key (Alphakey). You determine whether to use the Entire Key or Without Spaces.</p>
Graduation Year	<p>The year the student is scheduled to graduate. You determine whether to use All 4 digits or Last 2 digits.</p> <p><b>Note:</b> Available only for student logins.</p>
SSN	<p>The student's Social Security Number, if present. You determine how many of the last 4 digits are used.</p>
Tiebreaker	<p>This can only be selected as the last part of the login. A tiebreaker is added to the end of a login if there is another Login in the database with the same characters in the previous parts. For example, if the database contains two students named Jason Smith, the selected Login Parts are Last Name and First Name, both use five letters, and Always 3 digits is selected in the tiebreaker dropdown, the tiebreaker causes the Login of the second Jason Smith to be smithjason001.</p>

**Table 44 - Description of Login Format Part options**

## Formatting Login Options

Select Generate in Uppercase in the Login Options area (Figure 49) to create logins in uppercase.

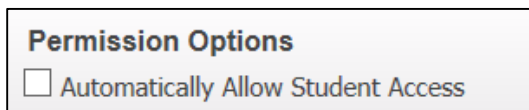


The screenshot shows a rectangular box with a light gray background. At the top left, the text "Login Options" is displayed in a bold, dark blue font. Below this, there is a single checkbox followed by the text "Generate in Uppercase". The checkbox is currently unchecked.

Figure 49 - Login Options area

## Formatting Permission Options

In the Permission Options area (Figure 50), you can select the Automatically Allow Student Access option. This automatically populates the Allow Student Access box on the Web Access tab in Student Profile for new students. By selecting this option, you won't have to set the box manually for each student when they are enrolled.

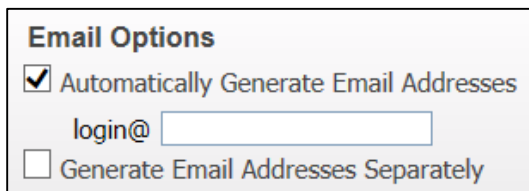


The screenshot shows a rectangular box with a light gray background. At the top left, the text "Permission Options" is displayed in a bold, dark blue font. Below this, there is a single checkbox followed by the text "Automatically Allow Student Access". The checkbox is currently unchecked.

Figure 50 - Permission Options area to automatically allow Student Access

## Formatting Email Options

You can use the Email Options area (Figure 51) to specify a default email address format. This ensures that all email addresses follow the same standard.



The screenshot shows a rectangular box with a light gray background. At the top left, the text "Email Options" is displayed in a bold, dark blue font. Below this, there are two options. The first is a checked checkbox followed by the text "Automatically Generate Email Addresses". Below this option is a text input field containing "login@" followed by a small empty box. The second option is an unchecked checkbox followed by the text "Generate Email Addresses Separately".

Figure 51 - Email Options area with Automatically Generate Email Addresses selected

To format default student email addresses:

1. In the Email Options area (lower-right corner of the Students configuration screen), select the Automatically Generate Email Address check box.

2. Type the domain (the part of the email address after the @ symbol). The preview area at the top of the Students configuration screen changes to reflect your Sample Email selections.

---

**Note** The student's automatically generated login is used as the account name (the *account name* is the part of the email address before the @ symbol).

---

3. Select Generate Email Addresses Separately to customize the email format. To learn more about creating a customized email format, see ["Defining Email Format"](#) (page 110).

The automatically generated email address is the email contained in the School Email box for the student. This box is located on the General tab in Student Profile.

### Defining Email Format

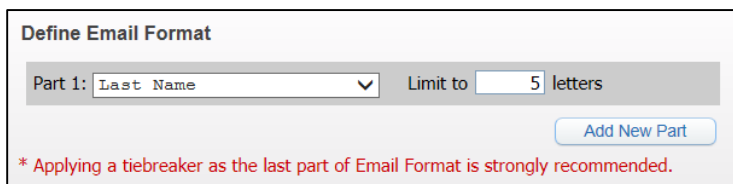
In the Define Email Format area (Figure 52), you decide the default format of the email address for new students. You can define the email format with a maximum of six Parts.

The formatting options used to define the email format are the same as those used in defining the login format. See Table 44 above for a description of these formatting options.

---

**Note** The Define Email Format area appears only when Generate Email Address Separately is selected in the Email Options area.

---



Define Email Format

Part 1: Last Name Limit to 5 letters

Add New Part

\* Applying a tiebreaker as the last part of Email Format is strongly recommended.

Figure 52 - Define Email Format area.

## Formatting Student Passwords

In the Define Password Format area (Figure 53), you decide the default format of the password for new students. You can define the password format with a maximum of six Parts.

The formatting options used to define the password format are the same as those used in defining the login format, with one exception (Random Password, which allows a randomly generated alphanumeric code to be included). See Table 44 above for a description of these formatting options.

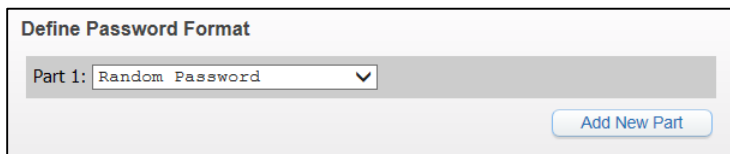


Figure 53 – Define Password Format area.

## Formatting Login Credentials for Guardians

You can automatically generate guardian logins, passwords, and permissions when a new guardian record is created. The configuration options for guardian credentials are identical to the options used to create student credentials. To learn more about formatting credentials for guardians, see “[Formatting Login Credentials for Students](#)” (page 104).

To format login credentials for guardians:

- Go to Product Setup\Skyward Contact Access\SE Setup\CF\AU\GO.

---

<b>Note</b>	On the Guardians configuration screen, you do not have the option to create email addresses.
-------------	--

---

# Assigning Student Credentials Individually

You can assign a login and password to a specific student. This is useful if you are enrolling a new student or helping a student who has forgotten their login or password.

To assign student credentials individually:

1. Go to Student Management\Students\SA\US.
2. Select a student.

---

**Note** The list of students contains only those students whose Default Entity matches the current Entity.

---

3. Click Edit.
4. Make updates as needed on the Student Access User Maintenance screen (Figure 54). Table 45 describes the options on this screen that you can edit.
5. Do one of the following:
  - Click Save and Email Account Reset Link. An email message containing the student’s login is sent to the person whose email address is on record. The email includes a link to reset the password. (To learn how to format the email, see “[Configuring the Account Information Email](#)” on page 126.)
  - Click Save.

**Student Access User Maintenance**

Student: Emory N Ackerleyscr School Email: scramblehome4671@scr36.com

Name Key: ACKEREMO000 Home Email: scramble4121@example.com

Login: ACKEREMO000

Password: ●●●●●●●●

Force password change at next login

Allow Student Access

Save

Save and Email Account Reset Link

Set Password

Back

Figure 54 - Student Access User Maintenance screen

Option	Description
Login	User's login. The default login is the user's Name Key. However, if your district has configured a specific login format, logins generated in this process follow that configuration.
Password	User's password that was generated by the system if the user has not changed it. Once a user changes the password, it is masked.
Set Password	Where you can enter a new password.
Generate	Assigns a random eight-character alpha-numeric password. If the password is masked, Generate is available only after clicking Set Password. After clicking Generate, the new password is visible until the user changes the password.
Cancel Password Change	Available only after clicking Set Password. Backs out of the set password process and preserves the previous password.
Force Password change at next login	Forces the user to change the assigned password at the next sign in, which also causes the password to be masked.
Allow Student Access	Gives the student permission to use Student Access. If you don't select this check box, the student cannot sign in even if the student is assigned a login and password.
School Email	Student's school email address. If your district has configured a specific student email address, the email in this box follows that configuration. However, you can update it to another configuration.
Home Email	The student's home email address.

**Table 45 - Description of options on the Student Access User Maintenance screen that can be edited**

# Assigning Family Credentials Individually

You can also assign a login and a password to a specific guardian. This process is useful if you are helping a guardian who has lost their login or password.

To assign family credentials individually:

1. Go to Student Management\Families\FM\US.
2. Select a guardian.

---

<b>Note</b>	The list of guardians contains only those whose students' Default Entity matches the current Entity.
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3. Click Edit.
4. Make updates to the Family Access User Maintenance screen as needed (Figure 55). Table 46 describes the options on this screen.
5. Do one of the following:
  - Click Save and Email Account Reset Link. An email message containing the guardian's login is sent to the person whose email address is on record. The email includes a link to reset the password. (To learn how to format the email, see "[Configuring the Account Information Email](#)" on page 126.)
  - Click Save.

Figure 55 - Family Access User Maintenance screen with options unique to guardians outlined in red

Option	Description
Login	User’s login. The default login is the user’s Name Key. However, if your district has configured a specific login format, logins generated in this process follow that configuration.
Password	User’s password that was generated by the system if the user has not changed it. Once the password is changed, it is masked.
Set Password	Where you can enter a new password.
Generate	Assigns a random eight-character alpha-numeric password. If the password is masked, Generate is available only after clicking Set Password. After clicking Generate, the new password is visible until the user changes the password.
Cancel Password Change	Available only after clicking Set Password. Backs out of the set password process preserving the previous password.
Force Password change at next login	Forces users to change their assigned password the next time they sign in.



Option	Description
Allow Family Access	Gives the guardian permission to use Family Access. If you don't select this check box, the guardian cannot sign in even with an assigned login and password.
Account Verified	Indicates that a guardian's email address has been verified.
Home Email	The guardian's home email address.
Subsystem Options	These options prevent access to the information specified in the option's name.

Table 46 - Description of the Family Access User Maintenance screen options

## Mass Assigning Credentials

You can assign logins and passwords at the same time to a group of students or guardians. For example, this process is useful when a new 9<sup>th</sup> grade class is enrolled at a high school at the beginning of a school year. You can mass assign logins and passwords to students either using a utility or an import file, and you can mass assign logins to guardians by using a utility.

### Mass Assigning Student Credentials Using the Generate Permissions/Passwords Utility

You can use the Generate Permissions/Passwords Utility to process login and password credentials for multiple Student Access users. If you have defined the format for logins and passwords, this utility will use the same formatting. If you have not, the system defaults are used. The system default for the login is the Namekey. The system default for the password is a random eight-character alpha-numeric value.

To mass assign student credentials using the Generate Permissions/Passwords Utility:

1. Go to Student Management\Students\SA Setup\UT\SP.
2. In the Utility Options area, select Generate Permissions/Passwords.

3. Configure the Mass Generate Student Permission/Passwords screen (see Figure 56). Table 47 describes the areas on this screen and the options in each area.

---

**Note** The default login format for any student who is allowed access through a mass generate process is the student's Namekey. However, if your district has defined its own login format, that format is used. To learn how to format the login, password and email information, see [“Formatting Login Credentials for Students”](#) (page 104).

---

4. Click Run.

**Mass Generate Student Permissions/Passwords**

**Utility Options**

Generate Permissions/Passwords  
 Import Permissions/Passwords from a csv File

**Entity Selection**

401 - WSIPC High School Entities

**Range Options**

Student Key: Low  High

Grad Yr/Grade:

Student Status:

Include only students in their default entity

All Calendars Calendars

All Schools Schools

**Login/Password Options**

Generate Logins/Passwords

Overwrite Existing Logins

Overwrite Existing Passwords

Force password change at next login (if password was generated)

**Permission Options**

Set the Web Access field

Allow Web Access:

Figure 56 - Mass Generate Student Permissions/Password screen

AREA	PURPOSE OF AREA
Entity Selection	Select the Entities you wish to run this utility. The utility updates the credentials of students whose Default Entity is selected.
AREA	PURPOSE OF AREA
Range Options	Defines the student ranges you wish to include.
AREA	PURPOSE OF AREA
Login/Password Options	Defines how logins and passwords will be generated. You can select one or more of the options.
Options in this Area	Description of Options
Generate Logins/Password	Allows you to determine how existing logins and passwords are updated.
Overwrite Existing Logins	Overwrites the existing student login. <b>Caution:</b> If you are generating logins for new students and you select this option, the logins for existing students will be overwritten.
Overwrite Existing Passwords	Overwrites the existing student passwords.
Force password change at next login (if password is generated)	Forces students to change the system assigned password the next time they login.

AREA	PURPOSE OF AREA
Permission Options	Determines whether a student has permission to use Student Access.
Options in this Area	Description of Options
Set the Web Access field	Allows you to change the student's Allow Web Access flag.
Allow Web Access	Determines whether students have permission to use Student Access. If set to No, students cannot sign in even if they are assigned a login and password.

Table 47 - Description of the options on the Mass Generate Student Permissions/Password screen when Generate Permissions/Passwords is selected in the Utility Options area

## Mass Assigning Student Credentials Using an Import File

This process allows you to upload permissions and passwords for students from a csv file. This might be helpful if you want to update permissions or passwords that have been maintained outside of Skyward's School Management System.

To mass assign student credentials using an import file:

1. Go to Student Management\Students\SA Setup\UT\SP.
2. In the Utilities Options area, select Import Permissions/Passwords from a csv File.
3. Select one of the following:
  - Import Students using Other ID.
  - Import Students using Alphakey.

This is the unique student identifier used in your import file.

- 4 Configure the Mass Generate Student Permissions/Passwords screen (Figure 57). Table 48 describes the areas on this screen and the options in each area.
- 5 Click Run.

**Mass Generate Student Permissions/Passwords**

**Utility Options**

Generate Permissions/Passwords

Import Permissions/Passwords from a csv File

Import Students using Other Id  Import Students using Alphakey

**Import File (Preview Import File Format)**

File Source:  Network Location  Upload Now

File:

**Login/Password Options**

Overwrite Existing Logins

Overwrite Existing Passwords

Force password change at next login (if password was generated)

**Permission Options**

Set the Web Access field

Allow Web Access:

Figure 57 - Mass Generate Student Permissions/Passwords screen when Import Permissions/Passwords from a csv File is selected in the Utility Options area

AREA	PURPOSE OF AREA
Import File (Preview Import File Format)	Determines the where the source file is located.
Options in this Area	Description of Options
File Source: Network Location	<p>This file source requires that the import file must be accessible by the print queue server. It cannot be a directory on your computer.</p> <p><b>Caution:</b> This functionality is not supported by WSIPC. Do not use this option.</p>
File Source: Upload Now	Enables Browse... so that you can navigate to the file to be uploaded.
Upload	Allows you to upload the selected file.
AREA	PURPOSE OF AREA
Login/Password Options	Defines how logins and passwords will be generated. You can select one or more of the options.
Options in this Area	Description of Options
Overwrite Existing Logins	Overwrites the existing student login.
Overwrite Existing Passwords	Overwrites the existing student passwords.
Force password change at next login (if password is generated)	Forces students to change the system assigned password the next time they login.

AREA	PURPOSE OF AREA
Permission Options	Determines whether a student has permission to use Student Access.
Options in this Area	Description of Options
Set the Web Access field	Allows you to change the student's Allow Web Access flag.
Allow Web Access	This flag determines whether students have permission to use Student Access. If set to No, students cannot sign in even if they are assigned a login and password.

Table 48 - Description of the options on the Mass Generate Student Permissions/Passwords screen when Import Permissions/Passwords from a csv File is selected in the Utility Options area

## Mass Assigning Guardian Credentials Using Generate Permissions/Passwords

This process allows you to generate Login and Password credentials for multiple Family Access users.

To mass assign guardian credentials using Generate Permissions/Passwords:

1. Go to Student Management\Families\FM Setup\UT\PP.
2. Configure the Mass Generate Family Permissions/Passwords screen (Figure 58). Table 49 describes the areas on this screen and the options in each area.
3. Click Run.

### Mass Generate Family Permissions/Passwords

**Entity Selection**

401 - WSIPC High School Entities

Run Back

**Range Options**

Guardian Name Key:  Low  High

Generate for Guardians with:

- Only Active Students in this Entity
- Only Inactive Students in this Entity who will be Active Next Year
- Only Inactive Students in this Entity
- Either Active or Inactive Students in this Entity who will be Active Next Year
- Either Active or Inactive Students in this Entity (All Students)

Generate for Guardians who are:

- Primary Family Members
- Head of Household of the Primary Family
- Members of Families that receive report cards

**Permission Options**

Set the Web Access field  
Allow Web Access:

**Login/Password Options**

- Generate Logins/Passwords
  - Overwrite Existing Logins
  - Overwrite Existing Passwords
  - Force password change at next login (if password was generated)

Figure 58 - Mass Generate Family Permissions/Passwords screen



AREA	PURPOSE OF AREA
Entity Selection	Select the Entities you want to run this utility for. The utility updates the credentials of guardians whose students' Default Entity is selected.
AREA	PURPOSE OF AREA
Range Options	Defines the ranges you want to include.
Options in this Area	Description of Options
Guardian Name Key	Range of guardians by Name Key to be included.
Generate for Guardians with	<p>Creates permissions/passwords for guardians based on their students' status within the Entity.</p> <p>You can select one of the following:</p> <ul style="list-style-type: none"> <li>• Only Active Students in this Entity</li> <li>• Only Inactive Students in this Entity who will be Active Next Year</li> <li>• Only Inactive Students in this Entity</li> <li>• Either Active or Inactive Students in this Entity who will be Active Next Year</li> <li>• Either Active or Inactive Students in this Entity (All Students)</li> </ul>
Generate for Guardians who are:	<p>Creates permissions/passwords for guardians based on their family.</p> <p>You can select one of the following:</p> <ul style="list-style-type: none"> <li>• Primary Family members</li> <li>• Head of Household of the Primary Family</li> <li>• Members of Families that receive report cards</li> </ul>

AREA	PURPOSE OF AREA
Permission Options	Determines whether a student has permission to use Student Access.
Options in this Area	Description of Options
Set the Web Access field	Allows you to change the student's Allow Web Access flag.
Allow Web Access	This flag determines whether students have permission to use Student Access. If set to No, students cannot sign in even if they are assigned a login and password.
AREA	PURPOSE OF AREA
Login/Password Options	Defines how logins and passwords will be generated. You can select one or more of the options.
Options in this Area	Description of Options
Generate Logins/Password	Allows you to determine how existing logins and passwords are updated.
Overwrite Existing Logins	Overwrites the existing student login.
Overwrite Existing Passwords	Overwrites the existing student passwords.
Force password change at next login (if password is generated)	Forces guardian to change the system assigned password the next time they login.

Table 49- Description of the options on the Mass Generate Family Permissions/Passwords screen

## Configuring the Account Information Email

An Account Information Email is the message that is sent to students and guardians when their credentials are first created. It is also sent if a student or guardian submits a request to retrieve a forgotten Login and/or Password.

## Configuring Student Access Account Information Emails

The configuration for both Student and Family Access information email is similar. The content of the emails may also be similar.

To configure Student Access account information emails:

1. Go to Student Management\Students\SA Setup\CF\ES.
2. In the Priority box, select Low or High.
3. Type a subject line in the Subject field as desired.
4. Type a message in the Body text box and/or click in the Body area and select one of the Predefined Fields and click Insert to add predefined information into the body of the message.
5. To see a preview of the message, click Preview Email.
6. To revert to the default Subject and message, click Reset Subject/Body.
7. Click Save.

To learn how a student or guardian submits a request for login and password information, see the *WSIPC Guide to Family and Student Access for Students and Guardians*.

## Configuring Family Access Account Information Emails

The configuration for Family Access information email is similar to that of Student Access. The content of the emails may also be similar.

To configure Family Access account information emails:

1. Go to Student Management\Families\FM Setup\CF\ES.
2. In the Priority box, select Low or High.
3. Type a subject line in the Subject field as desired.
4. Type a message in the Body text box and/or click in the Body area and select one of the Predefined Fields and click Insert to add predefined information into the body of the message.
5. To see a preview of the message, click Preview Email.
6. To revert to the default Subject and message, click Reset Subject/Body.
7. Click Save.

# Running Family and Student Access Utilities

The Family and Student Access modules contain several utilities that allow you to perform updates and modifications. For example, when you are implementing the use of Family and Student Access, you can generate logins and passwords for multiple users at the same time. You can also change all passwords if it is your practice to require students to request login credentials when they move to a new Entity. Each utility is described below.

## Student Access Utilities

There are five utilities you can use to manage Student Access. This section describes each utility.

To access these utilities:

- Go to Student Management\Students\SA Setup\UT.

## Mass Generate Student Permissions/Passwords

The Mass Generate Student Permissions/Passwords Utility is helpful when a district is implementing Student Access. It allows you to create and allow access to students or mass update permissions/passwords for existing students. To learn more about running the Mass Generate Student Permissions/Passwords Utility, see [“Mass Assigning Credentials”](#) (page 116).

## Mass Email Account Reset Link

The Mass Email Account Reset Link Utility allows you to generate emails that include the link to the Login page or a password reset link for a range of students. This is helpful at the start of the school year to remind students to reset their login credentials.

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**Note** When sending the Login link instead of the Password Reset link, the user is redirected to the login page if the Application Link is included on the Email Setup for Account Information screen. To learn more about the account information email, see “[Configuring Student Access Account Information Emails](#)” (page 126).

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## Mass Delete Student Login History

The Mass Delete Student Login History Utility removes Student Access login history based on the date and student ranges from the Student Login History. This utility is useful if you want to remove login history records that are no longer needed by your district.

## Clone Entity Configurations

The Clone Entity Configurations Utility clones Student and Family Access Entity Configurations from one Entity to another. This may be helpful in using the configuration for one Entity to set up other Entities, saving a significant amount of data entry time. This utility is available under both Student and Family Access and can be used from either location to clone both Student and Guardian options.

## Mass Add/Remove Students to the School Directory

The Mass Add/Remove Students to the School Directory Utility allows you to add or remove all students or families to the School Directory based on selected criteria. Figure 59 shows the Mass Add/Remove Families to the School Directory screen when Student Access School Directory (for students) and Mass Add Students to School Directory are selected. Table 50 describes the options available on this screen.

**Mass Add/Remove Families to the School Directory**

**Utility Options**

- Family Access School Directory (for guardians)  Student Access School Directory (for students)
- Mass Add Students to School Directory  Mass Remove Students from School Directory
- Only Add Students that have the Local flag set to 'Yes'
- Only Add Students that are Active in the District
- Display Family's Address
- Display Phone Numbers for Student's Primary Guardian
- Display Email Addresses of Guardians
- Display Student's Grade Level
- Display Student's School Email Address

Run  
Back

**Figure 59 - Mass Add/Remove Families to the School Directory options when Student Access School Directory (for students) is selected**

Option	Description
Mass Add Students to School Directory	Adds students to the Student Access School Directory based on your selected criteria.
Mass Remove Students from School Directory	Removes students from the Student Access School Directory based on your selected criteria.
Only Add Students that have the Local flag set to 'Yes'	<p>Adds only those students who have the Local flag set to Yes.</p> <p><b>Note:</b> The Local flag is located in Student Profile in the Distribute Student Demographic Information For area (Student Management\Students\ST\PR\Profile).</p>
Only Add Students that are Active in the District	Includes only active students.
Display Family's Address	Determines whether or not the family's street address shows in the directory.
Display Phone Numbers for Student's Primary Guardian	Shows the Phone Numbers for Guardian 1 of the student's Family 1.
Display Email Addresses of Guardians	Determines whether or not the guardian's email address shows in the directory.
Display Student's Grade Level	Shows the student's current grade level.
Display Student's School Email Address	Shows the student's school email address.
Remove Student if:	<p>Allows you to set criteria for students who should be removed from the School Directory based on whether their Local flag is set to Yes or No, or if the Local flag should be considered at all when removing students from the School Directory.</p> <p><b>Note:</b> This option is only available when Mass Remove Students from School Directory is selected.</p>

Option	Description
Remove Inactive Students	<p>Removes Inactive students from the School Directory.</p> <p><b>Note:</b> This option is only available when Mass Remove Students from School Directory is selected.</p>
Remove Graduated Students	<p>Removes students who have graduated from the School Directory.</p> <p><b>Note:</b> This option is only available when Mass Remove Students from School Directory is selected.</p>

**Table 50 - Description of the options on the Mass Add/Remove Families to the School Directory screen**

## Family Access Utilities

There are eight utilities you can use to manage Family Access. This section describes each of these utilities.

To run Family Access utilities:

- Go to Student Management\Families\FM Setup\UT.

### Mass Generate Family Permissions/Passwords

The Mass Generate Family Permissions/Passwords Utility is helpful when a district is implementing Family Access. It allows you to create and allow access to guardians or mass update permissions/passwords for existing guardians. To learn more about running the Mass Generate Family Permissions/Passwords Utility, see [“Mass Assigning Credentials”](#) (page 116).

### Mass Email Account Reset Link

The Mass Email Account Reset Link Utility allows you to generate an email that includes a link to the Family Access login page or the password reset link for a range of guardians. This is helpful at the start of the school year to remind guardians to reset their login credentials.



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<b>Note</b>	When sending the Login link instead of the Password Reset link, the user is redirected to the login page if the Application Link is included on the Email Setup for Account Information screen. To learn more about the account information email, see <a href="#">“Configuring Family Access Account Information Emails”</a> (page 127).
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You can determine whether to generate an email for guardians with active students, inactive students, or both. You can also determine whether to generate an email for guardians in the student’s primary family, the head of household of the primary family, or any guardian who is part of a family that receives report cards.

### **Mass Delete Family Login History**

The Mass Delete Family Login History Utility removes Family Access login history based on the date and guardian ranges from the Family Login History. This utility is useful in removing login history that your district no longer needs to store.

### **Clone Entity Configurations**

The Clone Entity Configurations Utility clones Student and Family Access Entity Configurations from one Entity to another. This may be helpful in using the configuration for one Entity to set up others. This utility is available under both Student and Family Access and can be used from either location to clone both Student and Guardian options.

### **Update Abandoned Online Payments**

The Update Abandoned Online Payments Utility finds payments submitted to a third-party vendor through Family Access that have not been applied to the student’s account. Payments that have not been applied are called *abandoned online payments*.

When a guardian successfully submits an online payment, two tracking records are created: the first when the guardian starts the process of submitting a payment, and the second when the transaction is completed. For example, when a guardian has completed an online Food Service payment, the Payments for [student name] tab shows the last payment amount, shows the last check as being paid online, and shows last payment date as the current date. If this information doesn't appear on the Payments tab, the payment was not completed and credit was not applied to the student's Food Service account.

The Update Abandoned Online Payments Utility involves three processes that are explained in this section.

### **Viewing Online Payment Logs**

Examining each student's Payment tab for abandoned online payments is time-consuming. Instead, you can view the abandoned online payment logs that are created when guardians submit online payments.

To view Online Payment Logs:

1. Go to Student Management\Families\FM Setup\UT\UA.
2. Click Logs to see Online Payment transactions from the third-party vendor.
3. Click in the Request Date box and enter a date range for the transactions you want to see. As an example, the Request Date Low box may have the date you last searched the transaction logs.
4. Click Apply Ranges. This shows any online transactions for the selected date range.

5. Examine the transactions in the log.

The Payment Status column is red for any abandoned online payments. For successfully accepted records, the Payment column is green. Records that are neither red nor green reflect payments that a guardian never completed.

6. To view details of a transaction, expand the selected record.

If any abandoned records exist, continue to the next two sections: “[Running a Report of Abandoned Online Payments](#)” and “[Running the Update Abandoned Online Payments Utility](#).”

### **Running a Report of Abandoned Online Payments**

After you have reviewed the abandoned online payment logs, you can print a report showing which records are updated if you run the Update Abandoned Online Payments Utility.

To run a report of abandoned online payments:

1. Go to Student Management\Families\FM Setup\UT\UA.
2. Click Report.

### **Running the Update Abandoned Online Payments Utility**

The Update Abandoned Online Payments Utility finds any record that was created when the guardian started the process of submitting an online payment that does not have a matching record showing that the transaction was completed. The utility then requests an update from the vendor for those records to see if the guardian actually completed the transaction.

If the transaction resulted in a payment that was completed and was deducted from the guardian’s account, but was never credited to the student’s account, the utility creates the missing payment record in the student’s account. It then creates the second tracking record to resolve the abandoned payment record.

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<b>Tip</b>	Run the Update Abandoned Online Payments Utility regularly to ensure that all payments are credited to student accounts.
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To run the Update Abandoned Online Payments Utility:

1. Go to Student Management\Families\FM Setup\UT\UA.
2. Click in the Payment Date Low and High boxes and set a date range for correcting abandoned records.
3. To update abandoned online payments, click Run.

The report this utility generates shows all online payment transactions. The records for which a payment has been applied to the student's account are labeled **Successful** and show an order number and confirmation number. If no records are labeled **Successful**, this means the utility merely cleared out transactions that were created when a guardian did not complete a transaction.

4. Click Finish.
5. Food Service payments that have been imported successfully create a payment record that is in Batch Status. To post payments to the student's Food Service account, you must run the Batch Update of Payments Utility.

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<b>Note</b>	If the non-payment problem was already discovered and payments have been manually added to the student's account to reflect the online payment, you can delete the new record from the Food Service Batch Update of Payments Preview prior to updating.
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## Mass Add/Remove Families to the School Directory

The Mass Add/Remove Families to the School Directory Utility allows you to add or remove all families or students to the School Directory based on selected criteria. Figure 60 shows the Mass Add/Remove Families to the School Directory screen when Family Access School Directory (for guardians) is selected. Table 51 describes each of the options.

**Mass Add/Remove Families to the School Directory**

**Utility Options**

Family Access School Directory (for guardians)
  Student Access School Directory (for students)

Mass Add Families to School Directory
  Mass Remove Families from School Directory

Add Family if: All Students in the Family have the Local flag set to 'Yes' ?

Only Add Families that have at least 1 Active Student in the District  
 Display Family's Address  
 Display Family's Primary Phone Number  
 Display Primary Guardian's Second Phone Number  
 Display Primary Guardian's Third Phone Number  
 Display Email Address of Primary Guardian  
 Display Email Address of Non-Primary Guardians

[Run](#)

[Back](#)

Figure 60 - Mass Add/Remove Families to the School Directory with Family Access School Directory (for guardians) selected

Option	Description
Add Family if: All Students in the Family have the Local flag set to 'Yes'	<p>Includes the family if all students in the family have the Local flag set to Yes.</p> <p><b>Note:</b> The Local flag is located in Student Profile in the Distribute Student Demographic Information For area (Student Management\Students\ST\PR\Profile).</p>
Add Family if: Any Student in the family has the Local flag set to 'Yes'	<p>Includes the family if at least one student in the family has the Local flag set to Yes.</p> <p>You may select this option if the family has some students who are inactive (such as graduated students) with other siblings actively enrolled.</p>
Add Family if: Ignore Local flag for all students	Includes families regardless of the value(s) their students' Local flag is set to.
Only Add Families that have at least 1 Active Student in the District	Includes families only if they have at least one student actively enrolled in the district.
Remove All Families	<p>Removes all families from the School Directory.</p> <p><b>Note:</b> This option is only available when Mass Remove Families from School Directory is selected.</p>

Option	Description
Remove Families if any of the selected conditions below are met	<p>Removes families from the School Directory according to their student’s Local flag value, Inactive status, or if students have graduated.</p> <p><b>Note:</b> This option is only available when Mass Remove Families from School Directory is selected.</p>

Table 51 - Description of the options on the Mass Add/Remove Families to School Directory screen when Family Access School Directory (for guardians) is selected

## Mass Assign Email Notifications

This utility assigns the selected email notifications to all guardians who have students currently attending the selected Entity.

## Mass Email Verified or Unverified Accounts

In order to communicate effectively with guardians through Family Access, you may find it valuable to ask guardians to verify the accuracy of the information in their Family Access account. This utility generates an email to send to all guardians who have not verified the information in their Family Access account. You can also send an email to all guardians who have verified their account, or to all guardians regardless of whether or not they have verified their information. The utility runs for all guardians in the specified Entities within the range and options selected. Figure 61 shows the Mass Email Verified or Unverified Accounts screen. Table 52 describes the options unique to this utility.

**Mass Email Verified or Unverified Accounts**

**Entity Selection**

401 - WSIPC High School Entities

**Range Options**

Low High

Guardian Name Key:  Run  
Back

Send to Guardians with:

Active Students in this Entity  Inactive Students in this Entity  Either Active or Inactive Students in this Entity

Send to Guardians who are:

Primary Family Members  Head of Household of the Primary Family  Members of Families that receive report cards

Send to Guardians with Account Status:

Unverified Account  Verified Account  Either Verified or Unverified Account

**Message Composition**

Priority: High

\* Subject: The Family Access Account for <Guardian Full Name> Has Not Been Verified

\* Body: Dear <Guardian First Name>,  
  
This email is being sent to inform you that your Family Access Account has not been verified. To get your account set up, please contact the district office.

Pre-defined Fields: <Guardian First Name> Insert Preview E-mail Reset Subject/Body

Asterisk (\*) denotes a required field

Figure 61 - Mass Email Verified or Unverified Accounts screen

Option	Description
Send to Guardians with:	Determines which guardians receive the email based on their student’s status in the selected Entity (Active, Inactive, or either Active or Inactive).
Send to Guardians who are:	Determines which guardians receive the email based on which family they are part of (Primary Family, Head of Household of the Primary Family, or Members of Families that receive report cards).
Send to Guardians with Account Status:	Determines which guardians will receive the email based on their account status (Unverified, Verified, or either Verified or Unverified Account).

Table 52 - Description of the options on the Mass Email Verified or Unverified Accounts screen

