
Quick Reference Guide:

Establishing Parent Portal Accounts

This guide will help districts utilize the Parent Portal function in the MT Edition to give parents access to their child's IEP.

Topics covered in this Quick Reference Guide include:

- *Establishing Portal Options*
 - *Adding Portal to Guardians*
 - *Establishing User Accounts*
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This guide is designed to walk districts through the process of setting up the Portal, adding Portal for parents/guardians, and creating Portal account User Names and Passwords.



Before beginning, consider the following:

1. Which parents should have access to the Parent Portal?

- Parents of students with an Individualized Education Program (IEP) should have a Portal account. *page 2*

2. Why do I want to let parents use the Parent Portal?

- Parents with a Portal account can access their child's IEP at any time, eliminating the need to request a copy from the district. *page 2*

3. What other information will a parent have access to through the Portal?

- The district manages the information that is available through the Portal. *page 2*

4. Who can access the IEP through the Portal?

- Only those persons who have an established relationship with the student **and** have Portal account may access the Portal. *page 3*

5. How are user accounts managed?

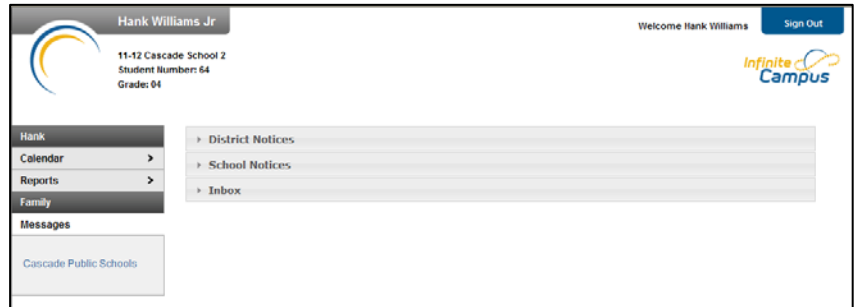
- User accounts are managed through the district. Parents/guardians are given the district's URL, a login and a password. Parents/guardians only need one username and password to access multiple student accounts. *page 6*

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Portal Access

The **Parent Portal** is a function of the MT Edition of Infinite Campus designed to give parents/guardians real-time access to student records – specifically a student's Individualized Education Plan (IEP).

Parents/guardians with **Portal** access may view and/or print copies of the IEP at any time, alleviating the need for districts to copy records for parents.



Portal Options

From the **Index**, select **System Administration/Portal/Preferences**. Choose a *School* (Year selected does not matter). To allow parents/guardians to see the IEP only, check the following boxes:

- **Reports** (un-check Default Student Schedule, Missing Assignment Report)
- **IEP**

Districts using the MT Edition for more than State Reporting purposes (e.g., attendance, term grades, etc) may choose to give all parents/guardians access to the **Portal**, or may give more information to Special Education parents accessing the Portal.

OPTIONAL:

Districts may choose to add notes to the **Portal**. Notes that are visible when viewing the IEP should be added under **Reports HTML**.

Click **Save**. Change school(s) and repeat.

Cascade School
School Number: 0158

Display Options

Save
Cutting and pasting from third party products, e.g., Microsoft Word, is not recommended.

Behavior HTML
Cutting and pasting from third party products, e.g., Microsoft Word, is not recommended.

Assessment HTML
Cutting and pasting from third party products, e.g., Microsoft Word, is not recommended.

Reports HTML
Cutting and pasting from third party products, e.g., Microsoft Word, is not recommended.

Viewing of the IEP requires installation of Adobe Reader. To install Adobe Reader click the link below. If you see in error in your child's IEP or have a change in contact information, please notify your child's teacher immediately. Thank you.

Hank Williams Jr

Welcome Hank Williams [Sign Out](#)

11-12 Cascade School 2
Student Number: 64
Grade: 04

Reports

Viewing of the IEP requires installation of Adobe Reader. To install Adobe Reader click the link below. If you see in error in your child's IEP or have a change in contact information, please notify your child's teacher immediately. Thank you.

Reports on this page require the Adobe Acrobat Reader (free).

[Get Acrobat Reader](#)

Establishing Portal Accounts

Portal access is assigned to individuals who have an established relationship with a student.

Click the **Search** tab. *Search for a: Household.* Enter the student's last name and click **Go**.

Click the name of the student and the **Relationships** tab. Verify/ check the box *Portal* for the individual(s) needing **Portal** access.

Click **Save**.

Williams Jr, Hank
Grade:04 #64 DOB:04/24/2002 Gender:M

Demographics | Identities | Households | Relationships | Enrollments | District Employment | District Assignments | Credentials

Save | New Non-Household Relationship

Relationships within the "Primary Household Relationships"

Name	Gender	Relationship	Start Date	End Date	Emergency Priority	Guardian Mailing	Portal	Messenger	Private
Williams, Audrey	F	Mother	08/30/2010			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Williams Sr., Hank	M	Father	08/30/2010			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Non-Household Relationships

Name	Gender	Relationship	Start Date	End Date	Emergency Priority	Guardian Mailing	Portal	Messenger	Private

Portal access may also be granted when establishing a **Household**.

In Step 3 of the **Census Wizard**, check the box *Portal* for the individual(s) needing **Portal** access.

Click **Save and Done**.

Relationships to Perry, Neil

Name	Birthdate	Gender	Relationship	Start Date	End Date	Seq	Guardian	Mailing	Portal	Messenger	Private
Perry, Charles		M	Father	08/30/2010			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Perry, Kimberly	02/26/2003	F	Sibling	08/30/2010			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Perry, Marie		F	Mother	08/30/2010			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Perry, Reid	02/15/2003	M	Sibling	08/30/2010			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Relationships to Perry, Reid

Name	Birthdate	Gender	Relationship	Start Date	End Date	Seq	Guardian	Mailing	Portal	Messenger	Private
Perry, Charles		M	Father	08/30/2010			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Perry, Kimberly	02/26/2003	F	Sibling	08/30/2010			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Perry, Marie		F	Mother	08/30/2010			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Perry, Neil	03/04/2004	M	Sibling	08/30/2010			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save & Done

Index Search Help

Search for a:
User

perry Go

Advanced Search >>

Search Results: 0 users

- Perry, Charles
- Perry, Kimberly
- Perry, Marie
- Perry, Neil
- Perry, Reid

Once a relationship is established and *Portal* checked, create a user account for the parent/guardian having access to the student's records.

Click the **Search** tab. *Search for a: User.* Enter the parent/guardian's last name. Click **Go**.

Click the parent/guardian name.

Enter a *Username*. It is recommended that the district follow a set protocol for creating usernames (e.g., last name/first initial – or first two initials if names are the same).

Choose a *Password*. It may be easiest to choose a generic password (e.g., the word password, or the school's mascot), then click *Force Password Change* on the **User Account** page.

Choose **Homepage** *Campus Portal*.

Click **Create User**.

NOTE: Parents are **not** added to any User Groups. **Portal Options** (above) govern what is visible to parents.

If using a generic password, click *Force Password Change* on the **User Account** page.

The district may also opt to expire the user account on the last day of school (or the last day of the current IEP). If desired, enter a date in the *Expires Date* field.

Click **Save**.

Parents/guardians with more than one child will only have one user account.

Choose a student from the toggle on the top of the **Portal** page.

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Students Leaving the District

When a student leaves the district, access to the Portal should be discontinued.

There are two options for discontinuing a Portal account.

User: perryc
Person: Perry, Charles

Save Delete Generate Random Password Login As User

User Account Editor

*Username: perryc *Password: password

Disabled Force Password All All Hide
Change Change Tools Calendars Banner

Expires Date: 06/02/2011 Homepage: Campus Portal

If the parent/guardian to which the account is linked is **only** linked to the leaving student, or **all** the students linked to a parent/guardian are leaving, enter an *Expires Date* on the **User Account** page.

The *Expires Date* should be the date the student was last enrolled in the district.

If the parent/guardian has multiple students in the district, and only **one** student is leaving the district; end the parent/guardian's relationship to the student.

Click the **Search** tab. *Search for a: All People*. Enter the student's last name and click **Go**.

Click the name of the student and the **Relationships** tab. *End Date* the student's relationship as of the last day of enrollment.

Click **Save**.

Perry, Kimberly
Grade: 03 #6 DOB: 02/26/2003 Gender: F

Demographics Identities Households Relationships Enrollments District Employment District Assignments Credentials

Save New Non-Household Relationship

Relationships within the **Primary Household Relationships

Name	Gender	Relationship	Start Date	End Date	Emergency	Priority	Guardian	Mailing	Portal	Messenger	Private
Perry, Charles	M	Father	08/30/2010	06/02/2011			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Perry, Marie	F	Mother	08/30/2010	06/02/2011			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Perry, Neil	M	Sibling	08/30/2010				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Perry, Reid	M	Sibling	08/30/2010				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Non-Household Relationships

Name	Gender	Relationship	Start Date	End Date	Emergency	Priority	Guardian	Mailing	Portal	Messenger	Private
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Campus Portal

Welcome Charles Perry Sign Out

Switch Student

- Neil Perry
- Reid Perry

Family

Messages

Calendar

Cascade Public Schools

District Notices

School Notices

Inbox

Parents/guardians will continue to have access to all remaining students to which they are linked through Relationships.

Parent Accounts

Once accounts are created, the district should supply the parent with the district's URL (portal website is the same as the district's website with one modification:

<https://aim.me#.mt.gov/mtedition/portal/mt####.jsp>), their username, password and instructions for using the portal.

A separate Quick Reference Guide has been created by the OPI that districts may use as a reference or distribute directly to parents.

The screenshot shows the AIM user management interface. On the left, there is a search bar with 'User' selected and 'Perry' entered. Below it, search results for '1 users' are listed, including 'Perry, Charles' with the username 'perryc'. The main area displays the 'User Account Editor' for 'User: perryc'. The editor has tabs for 'User Account', 'User Groups', 'Tool Rights', 'Calendar Rights', and 'Access Log'. It includes fields for Username ('perryc') and Password ('xyz123'). There are checkboxes for 'Disabled', 'Force Password Change', 'All Tools', 'All Calendars', and 'Hide Banner'. The 'Expires Date' is set to '06/03/2012' and the 'Homepage' is 'Campus Portal'. A second, smaller screenshot is overlaid on the bottom, showing the same editor but with the 'Force Password Change' checkbox checked and the password field containing 'password'.

Managing Portal Accounts

Portal accounts are managed the same as other district user accounts.

Passwords are managed by the district. The user may forget their password or lock their account (5 or more consecutive unsuccessful attempts). A disabled user account will appear red in the search results.

Click the **Search** tab. *Search for a: User*. Enter the user's last name and click **Go**.

Click the name of the user. To reset the password, enter the district's generic password in the *Password* field and/or un-check *Force Password Change*.

July 2011