FAMILY PORTAL GUIDE

APRIL 29, 2020

Contents

1. Creating an Account – New Families/Students

The process below is for families or students who are _**not**_ currently enrolled in this international student program. If the family already has a student enrolled in this international student program, see the _Creating an Account – Existing Families / Students_ section of this guide.

Step 1:

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

Step 2:

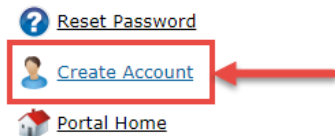Click the **Parents Start Here** link (wording may be different depending on configuration).

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

Step 3:

Click the **Create Account** link.

Reset Password

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Step 4:

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

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

✅ **Account Creation Successful!**

Please check your email inbox for a validation email which require

Please note you have 24 hours to complete this process.

Return to Sign In page.

Step 5:

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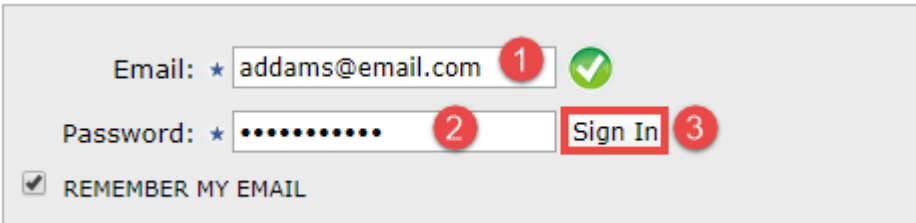

Validation Successful!
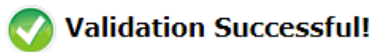
Return to Sign In page.

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

Step 6:

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

Step 7:

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

Congratulations! You have created a family portal account!

2. Accessing Account – Existing Families/Students

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

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

Step 1:

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

Step 2:

Click the **Parents Start Here** link.

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

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

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

Step 3:

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

? Reset Password

👤 Create Account

🏠 Portal Home

Step 4:

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

Reset Password

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

Email Address: ★ angelinefowl@email.com ✅

[Back] [Reset Password]

✅ **Reset Password Request Received**

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

Step 5:

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

Reset Password Request Complete

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

Return to Sign In.

Step 6:

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

Your Reset Password for Presentation

DO NOT REPLY TO THIS EMAIL

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

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

Your sign in email is: angelinefowl@email.com

Your new temporary password is: wWr368kC$2aX

Login to the Secure Family Portal using the above credentials.

Step 7:

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

Step 8:

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

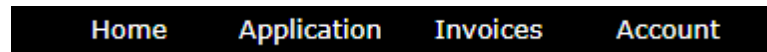Click **Continue**.

Password Change Complete

Continue

Step 9:

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

Congratulations! You have created a family portal account!

3. Navigation Menus

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

| Home | Application | Invoices | Account |

Home: Displays quick links for applications and invoices.

Application:

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

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

Invoices:

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

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

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

Back   button, rather than the internet browser back button.

Application > View Applications > Edit Application ⬅ breadcrumb trail

4. The Home Page

- **Application Instructions**: Provide guidelines and expectations for applying and outline documentation that must be submitted with the application. It is important to note that these guidelines and expectations can vary by international student program.

- **Create New Application:** Begin a new an application for a student.

- **View Applications**:   View existing applications in progress or submitted. This is an important screen to pay attention to! It provides the status of applications, allows you to resume working on an application, as well as warnings about applications soon to be deleted due to non-completion.

- **View Students:** Ability to view all students enrolled with the international student program that are associated with an agency. In additional, documents that have been shared with the agent are accessible (e.g. report cards)

- **View Invoices:** Ability to view invoices, generate receipts, initiate secure payment, and securely share invoices with parents.
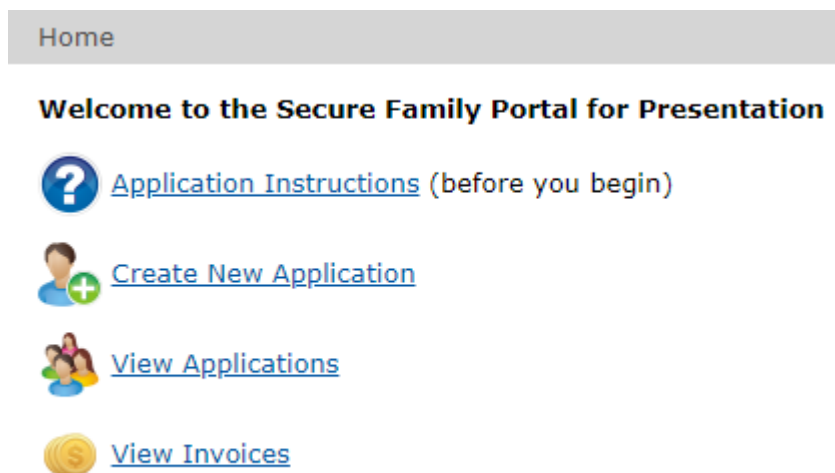
5. Creating an Application

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

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

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

❌ SAMANTHA TABITHA JOHNSTON

✅ Samantha Tabitha Johnston

Required Information

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

Back   Create Application

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

Back   Save & Go Previous   Update   Save & Go Next

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

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

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

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

6. Viewing Student Invoices

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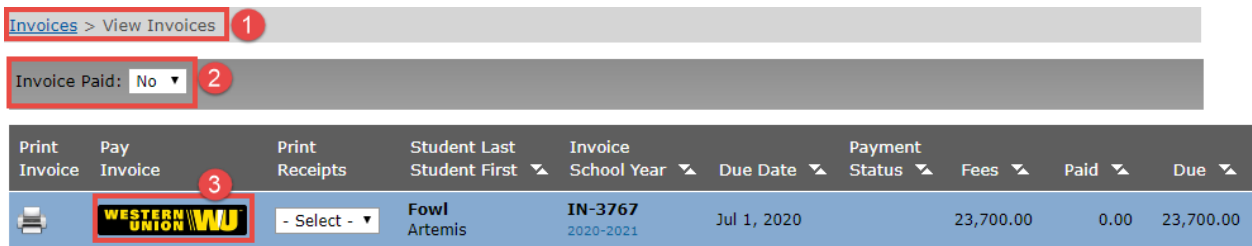
Viewing <u>Unpaid</u> Invoices

1. In the **Invoices** menu, select **View Invoices**.
2. In the **Invoice Paid** drop-down, select **No**.

    a. Use the 🖨 icon under **Print Invoice** to generate a pdf version of the invoice.

    b. Where the international student program is associated with a payment gateway, an additional button may appear for the user to pay the invoice online.

Viewing <u>Paid</u> Invoices and Printing Receipts

1. In the **Invoices** menu, select **View Invoices**.
2. In the **Invoice Paid** drop-down, select **Yes**.

    a. Use the 🖨 icon under **Print Invoice** to generate a pdf version of the invoice.

    b. Use the dropdown menu under **Print Receipts** to generate a pdf receipt.

Using Payment Gateways

In cases where an international student program is integrated with a financial payment gateway such as Western Union or Flywire, invoices can be securely paid directly from the portal

1. In the **Invoices** menu, select **View Invoices**.
2. Set the **Invoice Paid** dropdown to **No**.
3. Click the **Pay Invoice** button to begin the payment process. (Western Union used in example, may also be Flywire).

4. Read the pop-up message that says you will be transferred to the secure payment site. Click **OK** to proceed.
5. Follow the instructions to complete payment.