How to Manage Parent Accounts

Roles that Have Access: Agency Admin, Agency Data Reporting Contact

While parents/guardians fill out their *Hubbe* Family Applications, there may be problems that arise in which applicants will forget their password, type in the wrong email, need a change in email, etc. In order to make managing accounts easier, Admins have the ability to manage parent accounts for the Application Portal right in *Hubbe*. In addition to application accounts, this record houses all parent records in your system that do not have a portal account yet and all those that do have a portal account for which you can assist with password and/or username resets. This saves time trying to help parents/guardians with their accounts, and makes it easy to quickly change an email, rest a username and/or password, update parent PINS, and immediately notify the parents/guardians of the change.

This instruction sheet will explain how to manage parent accounts for both the Application Portal and regular Parent Portal Accounts, including how to reset usernames and reset passwords. We will also talk about generating/managing PINs for parents, contacts, and authorized pickups.
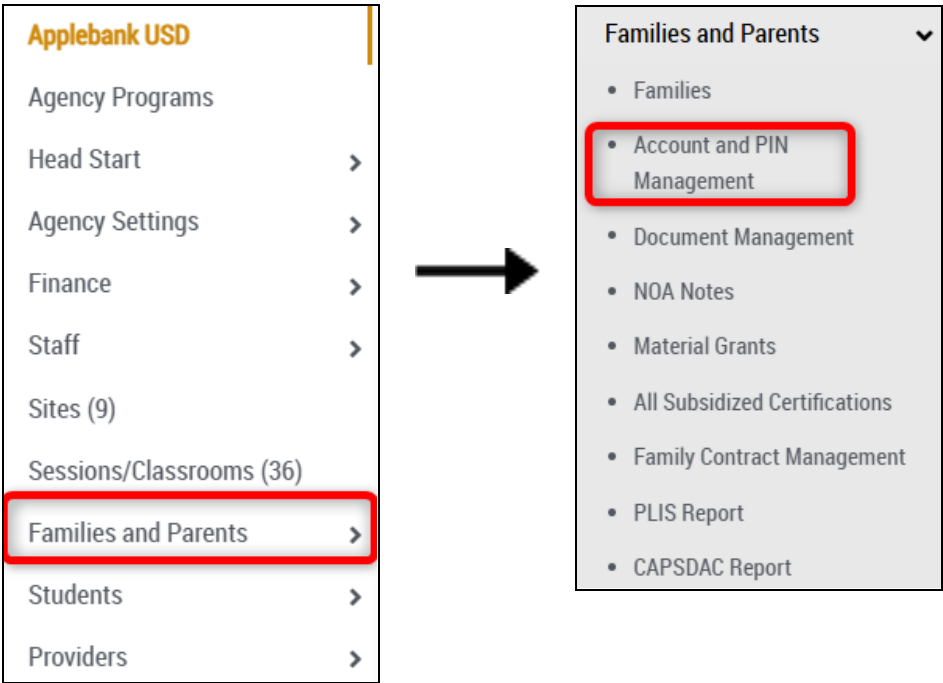
Table of Contents

Click on the topic or page number to jump to the corresponding section of the instruction sheet.

1   From the Agency Menu, click on the Menu item for "Families and Parents" and then click on "Account and PIN Management."

2   You will then be directed to the "Account and PIN Management" record. This record includes every account with a Family Application, whether the status of the application is Not Started, In Process, Submitted, Revisions Needed, or Approved - as well as all parent records that have a parent portal account created. Those parents with a parent portal account will be listed in the "Parents with Accounts" tab and those without a parent portal account will be listed in the "Parents without Accounts" tab. You can create new parent accounts right from this record, as well as many other features that will be covered in this instruction sheet.

The first tab displayed on the page titled, "Verified Accounts" includes a grid listing all parents at the agency that have a verified parent portal account. When a family has been invited to complete a family application via *Hubbe*, the application's account will appear in this tab (with the email associated with the application). This section will review the actions and features available in this tab.
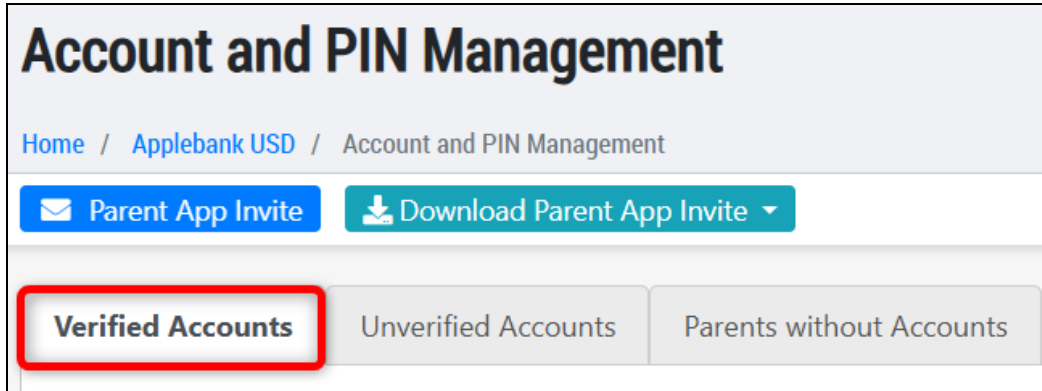
Grid Tools

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1. There are three (3) action buttons within the grid in the "Verified Accounts" tab: Copy, Excel, and Print. The "Copy" button will copy all the parent accounts listed in the grid to your computer's clipboard. The "Excel" button will download an Excel copy of the parent accounts listed in the grid. The "Print" button will allow you to print the parent accounts listed in the grid.

2. The grid features search filters and a search field that both influence the "Copy," "Excel," and "Print" buttons in the grid. The criteria applied to the grid, whether by the filters or search field, will be the only parent accounts that show up in your copy, download (Excel), and print.
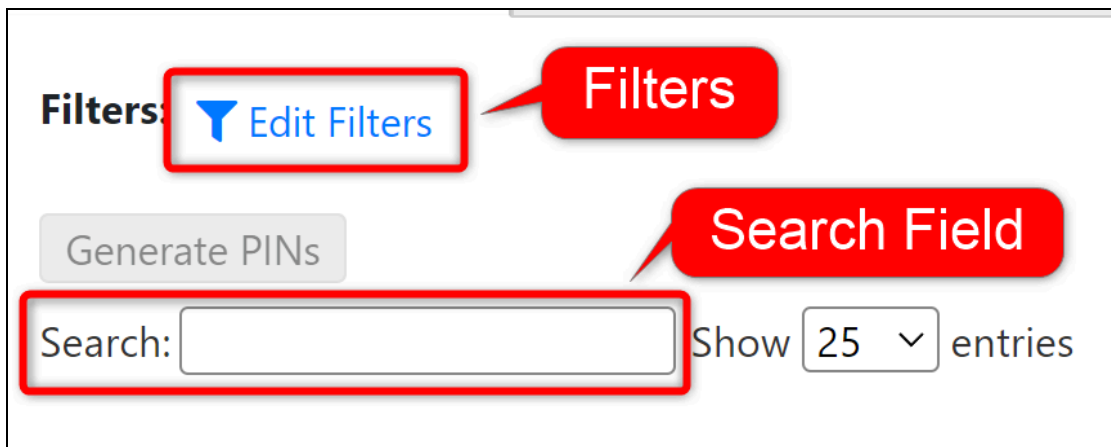
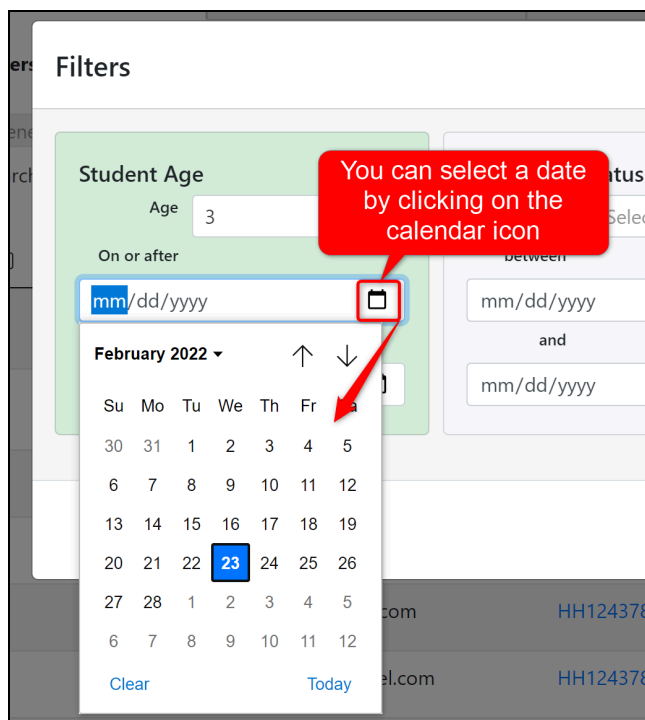To use the search filters to sort through the grid, click on the blue "Edit Filters" text and select/enter your desired filters.

Once you have selected your desired filters, click "Apply filters" to apply all selected filters. If you would like to clear all selected filters, click the "Reset" button.
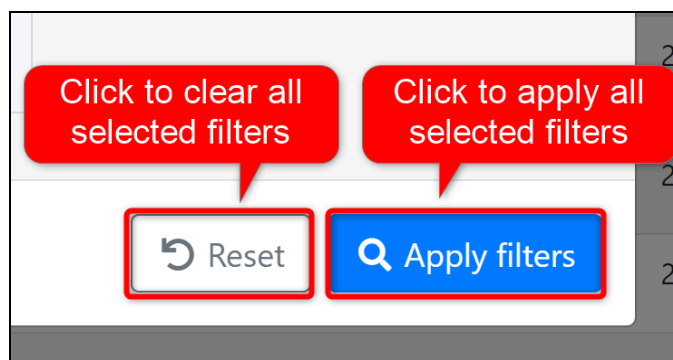
To use the search field, enter the applicable information into the text field, such as the parent name, family name, parent ID, parent PIN, household ID, students, or email.
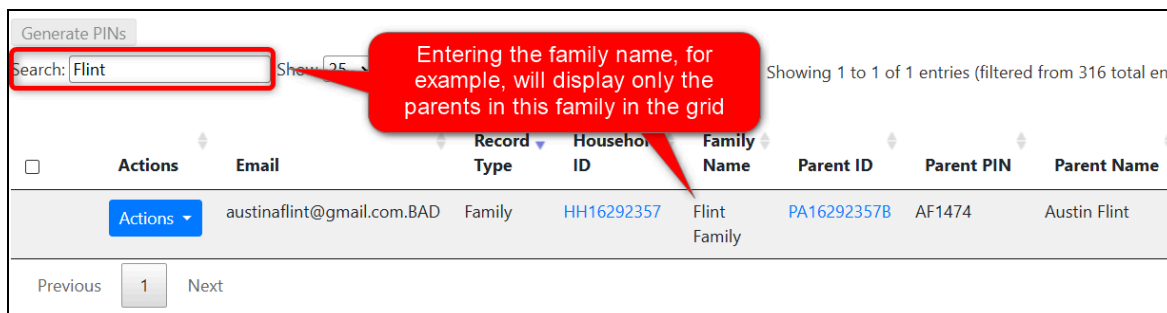
1 The parent PIN is used by the parent to sign into the eSignature portal to mark their child's attendance when they are dropping their kid off/picking their kid up. You can generate the PIN right from the "Verified Accounts" tab, as described below.

To generate a PIN, first click the checkbox next to all the parents you would like to generate a pin for. Then click the "Generate PINs" button above the grid.

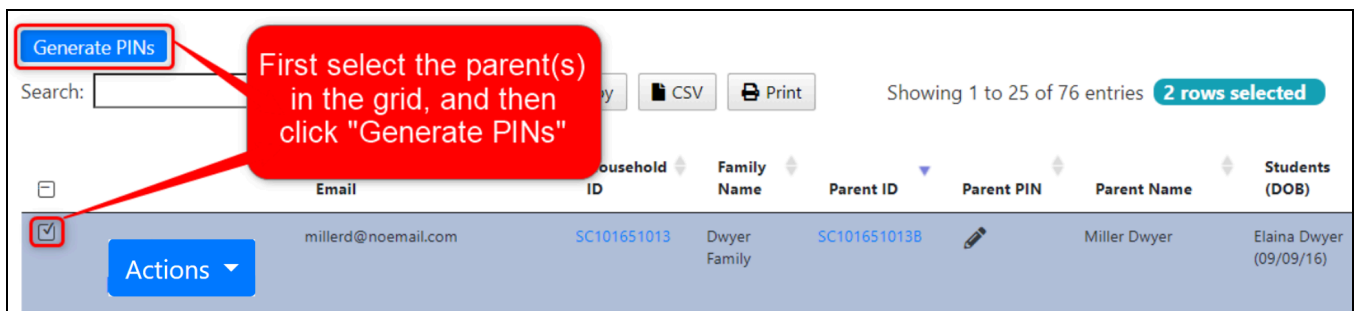**Please note that you will only notice a checkbox next to parents who have a parent record in *Hubbe* and have yet to get a PIN. The parents that do NOT have a checkbox meet one of the two following criteria: a PIN has already been generated for the parent, or the parent has not yet had a parent record created and will need to have a record created before they can get a PIN.**

2 In the modal that appears, select whether you would like to send an email to the parent with their new PIN. We highly recommend that you send an email to easily provide the parent their new PIN. Then click "Save."
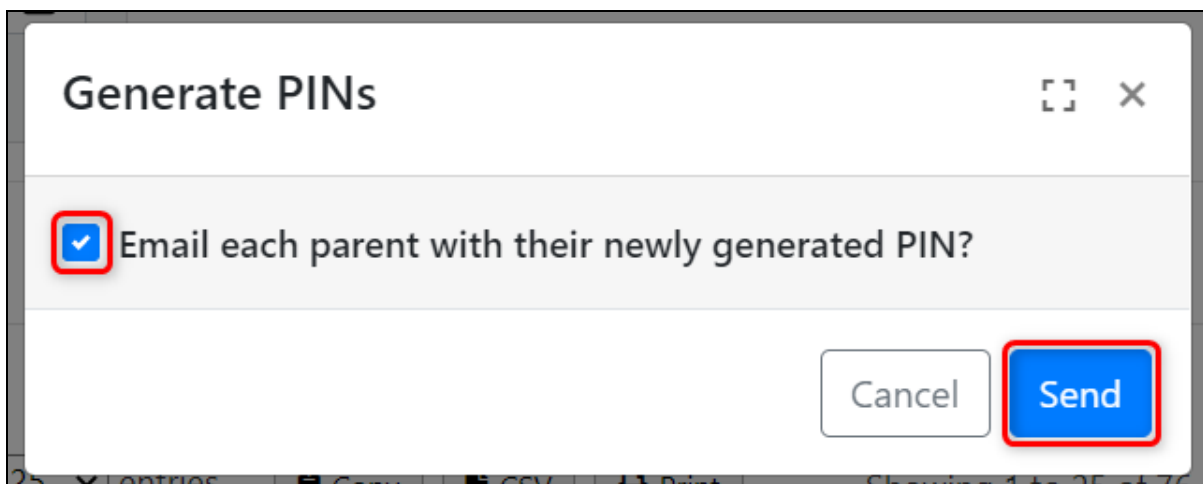
The email sent will look like the one in the image below.
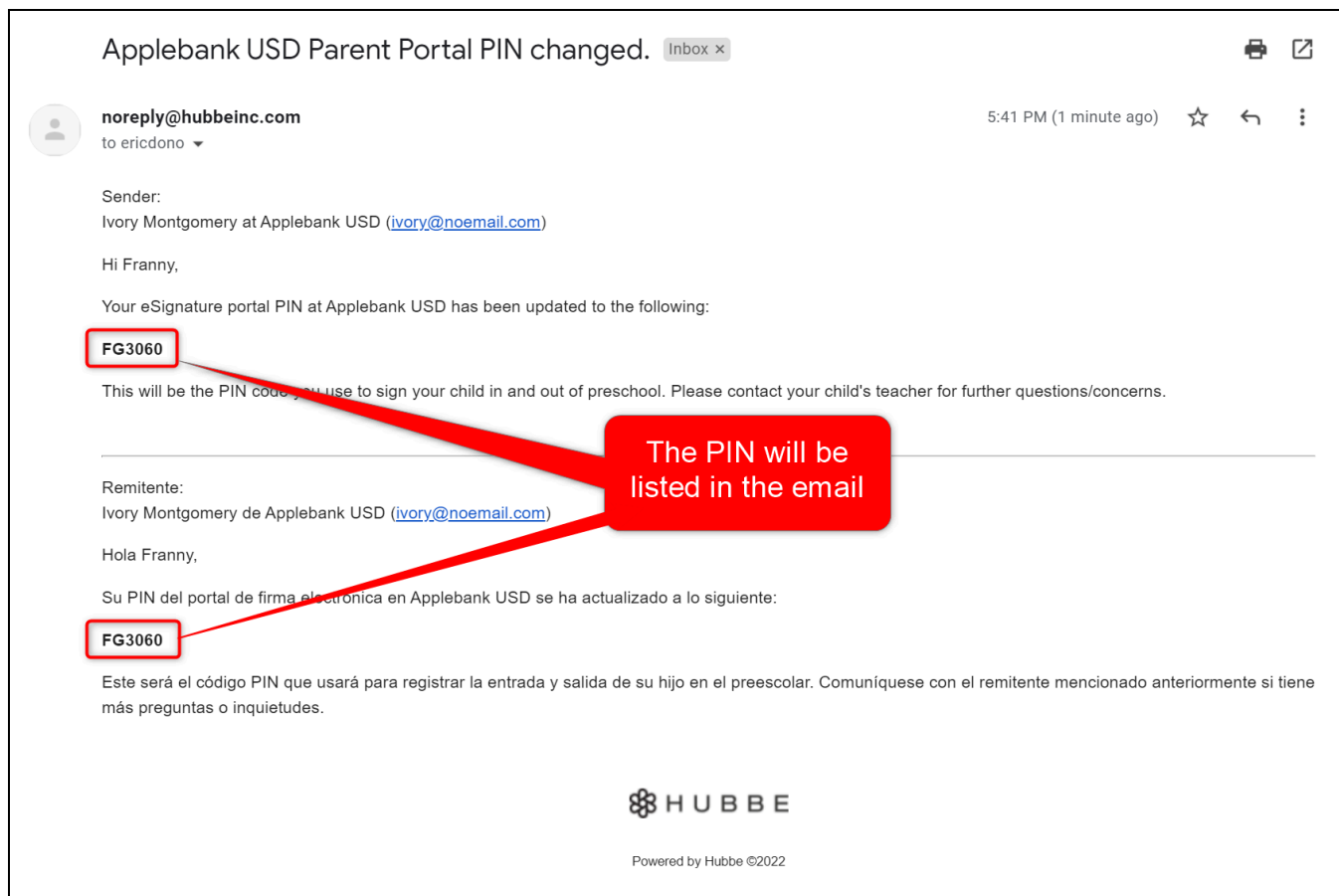
Reset Email/Password/Parent Pin

For parents that already have accounts, there are several actions that can be taken to help resolve issues they may be experiencing. We can assist them directly from the grid.

1 Here you can reset either the email, password, or parent pin for any Parent Portal account. To do so, first locate the family account that you would like to modify. You can use the search bar to quickly look up the email, parent name, or student name. You can also sort each column in either ascending or descending order to easily organize the grid.

2 Once you have located the family account, click the "Actions" button on the left-hand side of the grid. This will expand to show a list of several fields that can be reset.

3 Clicking on the "Reset Email" option will open up the modal shown below. In the text space provided, enter the new parent portal email for this user, and click on the blue "Save" button. This will also send a confirmation email to verify the change.

Please note that the parent portal account's email will **not** be changed **until the parent clicks on the verification link in the email sent to them** *and* **logs in**.

4 Clicking on the "Reset Password" option will open up the modal shown below. Click on the blue "Send" button to email a Reset Password link to the parent's email.

5 Clicking on the "Reset Parent Pin" option will open up the modal shown below. In the text space provided, enter the new parent pin for this parent, and click on the blue "Save" button. You may also check the box for "Send email to parent" to email these changes to the parent, if desired. This will update the Pin immediately, making the previous Pin no longer usable.

Edit Parent Portal Pin   ⌐⌐ ✕

Edit Portal Pin for Paloma McPherson **1**

PM | 5662

☐ Send email to parent

2

Check here to send email to parent (if desired)

Cancel   **Save**

6 The email sent to the parent will be displayed in the email, as seen in the image below.

Applebank USD Parent Portal PIN changed. Inbox ✕   🖨 ⤢

noreply@hubbeinc.com   5:41 PM (1 minute ago)   ☆ ↩ ⋮
to ericdono ▾

Sender:
Ivory Montgomery at Applebank USD (ivory@noemail.com)

Hi Franny,

Your eSignature portal PIN at Applebank USD has been updated to the following:

FG3060

This will be the PIN code you use to sign your child in and out of preschool. Please contact your child's teacher for further questions/concerns.

The PIN will be listed in the email

Remitente:
Ivory Montgomery de Applebank USD (ivory@noemail.com)

Hola Franny,

Su PIN del portal de firma electrónica en Applebank USD se ha actualizado a lo siguiente:

FG3060

Este será el código PIN que usará para registrar la entrada y salida de su hijo en el preescolar. Comuníquese con el remitente mencionado anteriormente si tiene más preguntas o inquietudes.

✿ H U B B E

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1 In addition to resetting the Parent's email/password/parent pin, you also have the option to disconnect their parent portal account entirely. Doing so will block the respective parent from being able to login into the parent portal unless a new parent portal account is created for them.

In order to disconnect a parent portal account, first locate the family account that you would like to modify. You can use the search bar to quickly look up the email, parent name, or student name. You can also sort each column in either ascending or descending order to easily organize the grid.

2 Once you have located the family account, click the "Actions" button on the left-hand side of the grid. This will expand to show a list of several fields, click on the one labeled "Disconnect Account".

3 A modal will pop up, asking if you are sure you want to disconnect the parent from their portal account. If you are certain this is the action that you wish to take, click on the red "Delete" button. Otherwise, click on the "Cancel" button to go back to the grid.

The second tab displayed on the page titled, "Unverified Accounts" includes a grid listing all parents at the agency that need to **verify their account's email address**. They can do this by clicking the verification link sent in an email upon creating their account or by accepting the agency under the agency dropdown at the top right of their parent portal homepage. This section will review the actions and features available in this tab.
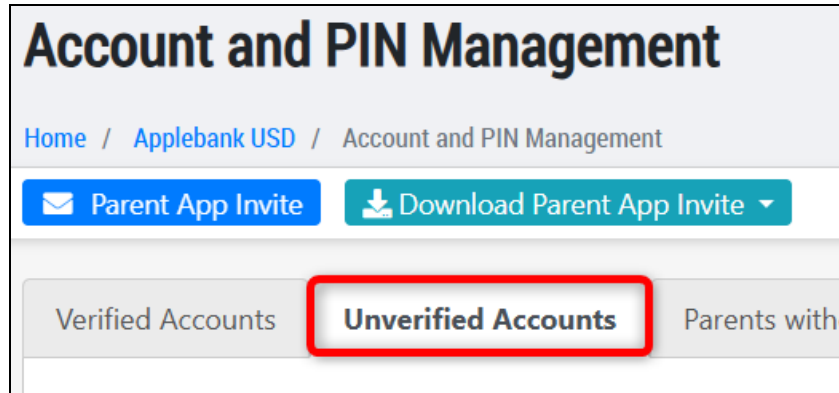
Re-send Verification Email

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1 Parents who are housed within this tab shouldn't be there for long. Oftentimes the reason they still have their account pending is because they never clicked on the verification link sent to their email originally. In order to make it as easy as possible, you have the option to re-send the verification to one or more parents from the grid. To do so, first check the boxes next to the parents that you want to re-send the verification email for, then click on the blue button labeled "Re-send Verification Email"
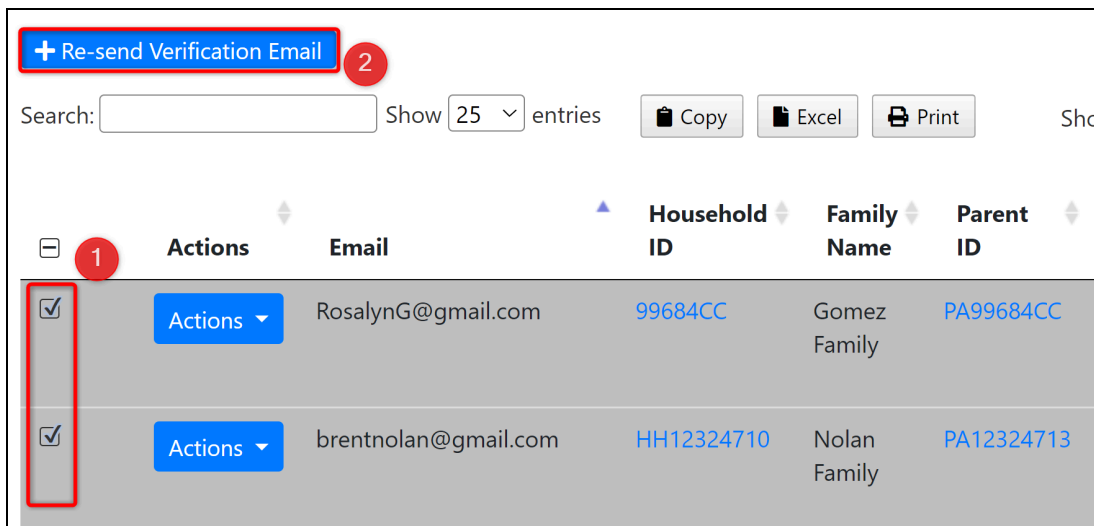
2 This will open up a modal confirming that you want to resend the verification link to the parent(s) that you selected in the grid. You can click on the blue "Save" button to finalize your decision, and send the reminder emails with the verification link included.

Send Reminder Email

Are you sure you want to resend the verification link to the 2 selected parents?

Cancel   **Save**

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3 The email sent to the parent will be displayed in the email, as seen in the image below.

From: <noreply@hubbeinc.com>
Date: Wed, Feb 23, 2022 at 3:06 PM
Subject: Verification Needed to Create Hubbe Parent Portal Account
To: <cierra+88@ipinwheel.com>

Applebank USD Application

A Hubbe parent portal account has been created using this email address. You must first verify your account's email address by clicking (or copy-pasting into the browser) the one-time link below.

Set your password
https://demo2.sishubbe.com/Parents/Applebank/Login/VerifyWithPassword?a=fd94e231-cbd4-4e96-86db-901ae1507ab1&e=cierra%2b88%40ipinwheel.com&v=F2B59303A2DB46E5996CDA62B9D2919B

⊗ H U B B E

Disconnect Account

1 You also have the option to disconnect their parent portal account entirely. Doing so will block the respective parent from being able to login into the parent portal unless a new parent portal account is created for them.

In order to disconnect a parent portal account, first locate the family account that you would like to modify. You can use the search bar to quickly look up the email, parent name, or student name. You can also sort each column in either ascending or descending order to easily organize the grid.

	Actions	Email	Household ID	Family Name	Parent ID	Parent PIN		
☐	Actions ▾	palomamcpherson@noemail.com	SC101621006	McPherson Family	SC101621006A	PM5662	Paloma McPherson	Kallie McPherson (12/09/17)
	Actions ▾	michaeljameson@noemail.com	HH14183070	Jameson	PA14183082	MJ5822	Michael Jameson	Chloe Jameson (09/25/16)

Re-send Verification Email

Search: [   ]

Type the name of the parent into the search field to quickly find an account

Excel   🖶 Print   Showing 1 to 23 of 23 entries

Click the arrows to sort the column in ascending or descending order
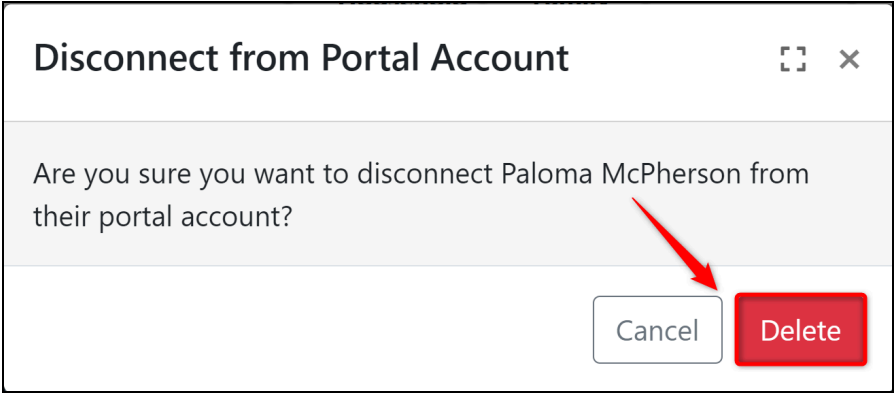
2   Once you have located the family account, click the "Actions" button on the left-hand side of the grid. This will expand to show one option, click on the one labeled "Disconnect Account".

	Actions	Email
☐		
☐	Actions ▼	Anna.lopez@me.cor
	✔ Verify Account	
	↻ Reset Email	o
☐	✖ Disconnect Account	

3   A modal will pop up, asking if you are sure you want to disconnect the parent from their portal account. If you are certain this is the action that you wish to take, click on the red "Delete" button. Otherwise, click on the "Cancel" button to go back to the grid.
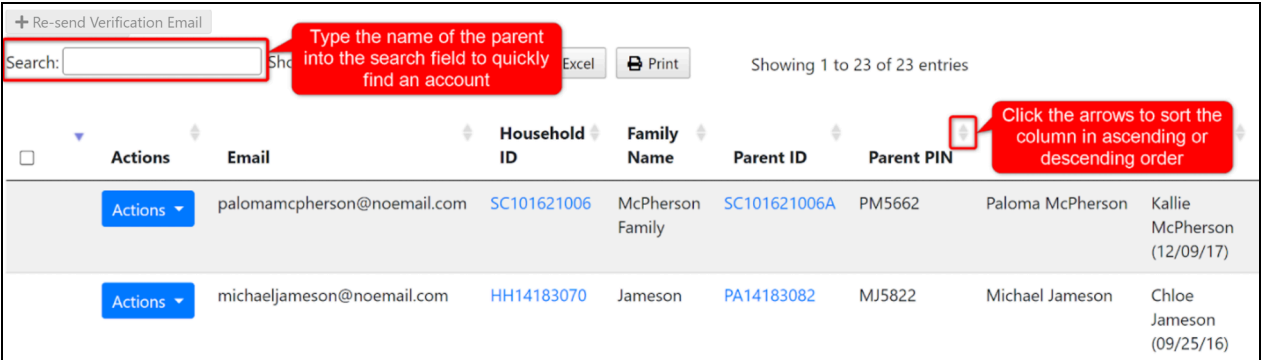
Disconnect from Portal Account   ⛶   ✕

Are you sure you want to disconnect Paloma McPherson from their portal account?

Cancel   Delete

Reset Email

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1   You also have the option to reset the email that is associated with their Parent Portal account. Perhaps there was a typo, or the parent wishes to use a different email address altogether. In this case, we would want to reset their email.

In order to reset the email associated with the parent portal account, first locate the family account that you would like to modify. You can use the search bar to quickly look up the email, parent name, or student name. You can also sort each column in either ascending or descending order to easily organize the grid.

✚ Re-send Verification Email							
Search: [ ]		Excel	🖨 Print	Showing 1 to 23 of 23 entries			
						Click the arrows to sort the column in ascending or descending order	
☐	Actions	Email	Household ID	Family Name	Parent ID	Parent PIN	
	Actions ▼	palomamcpherson@noemail.com	SC101621006	McPherson Family	SC101621006A	PM5662	Paloma McPherson	Kallie McPherson (12/09/17)
	Actions ▼	michaeljameson@noemail.com	HH14183070	Jameson	PA14183082	MJ5822	Michael Jameson	Chloe Jameson (09/25/16)

Type the name of the parent into the search field to quickly find an account

2 Once you have located the family account, click the "Actions" button on the left-hand side of the grid. This will expand to show one option, click on the one labeled "Reset Email".
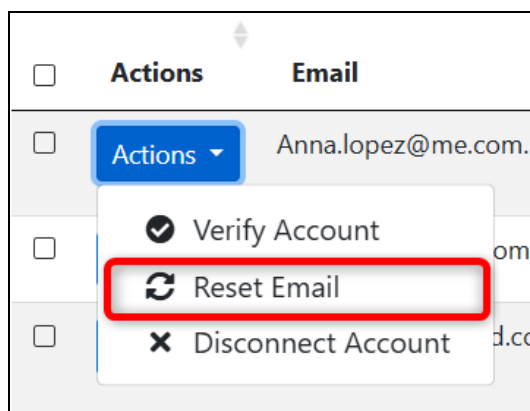
3 A modal will pop up, asking if you would like to update the email address for the parent. You can enter in the updated email address and click "Save" to send the parent a verification email to their **new** address. Otherwise, click on the "Cancel" button to go back to the grid.

Manually Verify Account

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1 Finally, You also have the option to **manually verify** the email that is associated with their Parent Portal account. If the parent is unable to verify their email address themselves, and have confirmed with you that it is the email they wish to use— you are able to verify it for them. However, this is something we recommend using as a last effort.

In order to manually verify the email associated with the parent portal account, first locate the family account that you would like to modify. You can use the search bar to quickly look up the email, parent name, or student name. You can also sort each column in either ascending or descending order to easily organize the grid.
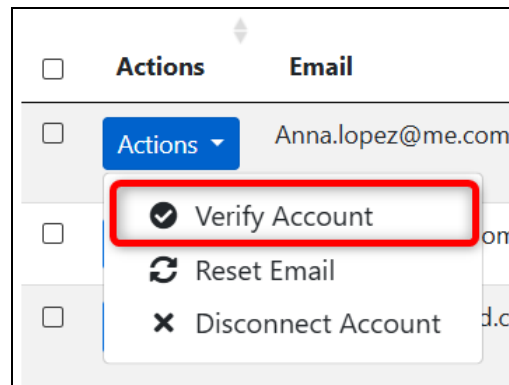
Type the name of the parent into the search field to quickly find an account

Click the arrows to sort the column in ascending or descending order

2 Once you have located the family account, click the "Actions" button on the left-hand side of the grid. This will expand to show one option, click on the one labeled "Verify Account".

3 A modal will pop up, asking if you are sure you want to manually verify the email address for the parent. If you are certain, you can click "Verify", or if you change your mind you can click "Cancel"


Manually Verify Account

Are you sure you would like to mark the Anna.lopez@me.com.BAD portal account as verified? Please make sure this is the correct email address for the parent before doing so to prevent messages being sent to the wrong email address. The parent will receive an email to set or reset their password.

Cancel Verify

The third tab displayed on the Account and Pin Management record titled, "Parents without Accounts" includes a grid listing all parents that have a parent record on your system but have yet to have a parent portal account created for them. In this tab, you can create a parent portal account, which will transfer that parent to the "Unverified Accounts" tab.
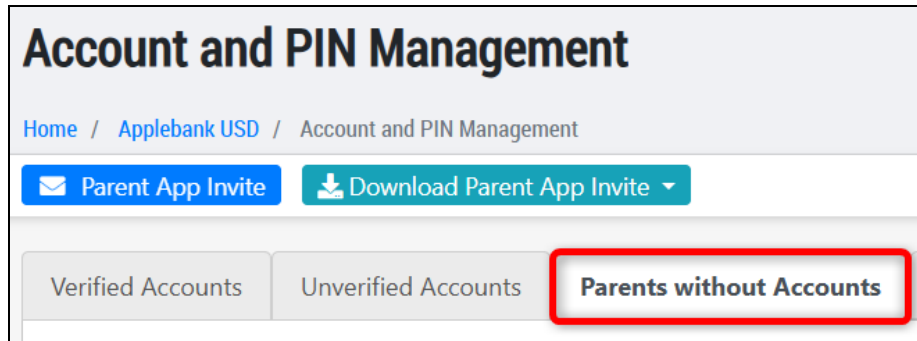
Enter/Update Email Addresses

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1 The parents listed in this grid have been entered into *Hubbe* without a parent portal account. To create a Parent Portal account for a parent here, you must first enter their email address if they do not already have one.

To enter or edit an email address for a parent in the grid, click the pencil button next to the email (or lack of email) in the "Email" column.

2 In the modal that appears, enter the parent's email address and then click "Save."

3 You will notice the updated email address in the "Email" column. There will also now be a checkmark to the far left of the parent's row, which can be selected to create a portal account for that parent. Please refer to the next section to learn how to create a parent portal account.

	Search: [ ] Show 25 ⌄ entries					Family Name
☐	Household ID ▲	Parent ID ⬍	Parent Name ⬍	Email	⬍	
☐	300616CC	PA12542615	Kenneth Mraz	kennethm@noemail.com ✏		Mraz Family

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Create Parent Portal Accounts

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1 To create a Parent Portal account for a parent listed in the grid, first select the parent by checking the box to the left of their "Household ID." Please note that the parent must have an email address to create a portal account. The checkbox to select the parent will not display until an email is created, which you can find instructions for in the previous section.

					Family Name	Family Size	Income
☐	ID	ID	Name	Email			
☑	300616CC	PA12542615	Kenneth Mraz	kennethm@noemail.com ✏	Mraz Family	5	$1,387.00
☐	300616CC	PA300616CC	Jalon Thao	[No email entered] ✏	Mraz Family	5	$1,387.00
	301218CC			...red] ✏	Osinski Family	5	$2,987.00

A checkbox appears when the email is entered

No email, so no checkbox

To use the search filters to sort through the grid, click on the blue "Edit Filters" text and select/enter your desired filters.

Filters

Student Age
Age 3
On or after
mm/dd/yyyy 📅

You can select a date by clicking on the calendar icon

February 2022 ⌄   ↑ ↓

| Su	Mo	Tu	We	Th	Fr	
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	1	2	3	4	5
6	7	8	9	10	11	12

Clear   Today

between
mm/dd/yyyy
and
mm/dd/yyyy

Once you have selected your desired filters, click "Apply filters" to apply all selected filters. If you would like to clear all selected filters, click the "Reset" button.

Click to clear all selected filters

Click to apply all selected filters
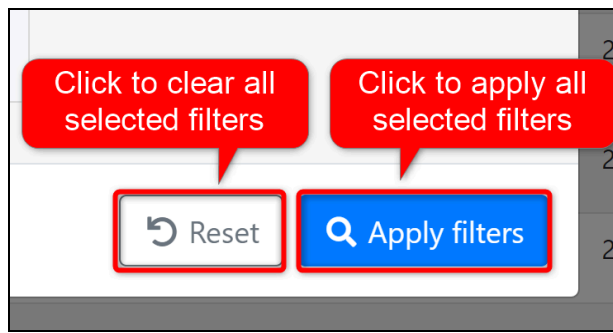
To use the search bar, simply type information pertaining to the parent you're looking for into the text field, which can be information from any of the columns listed on the grid such as the parent name.
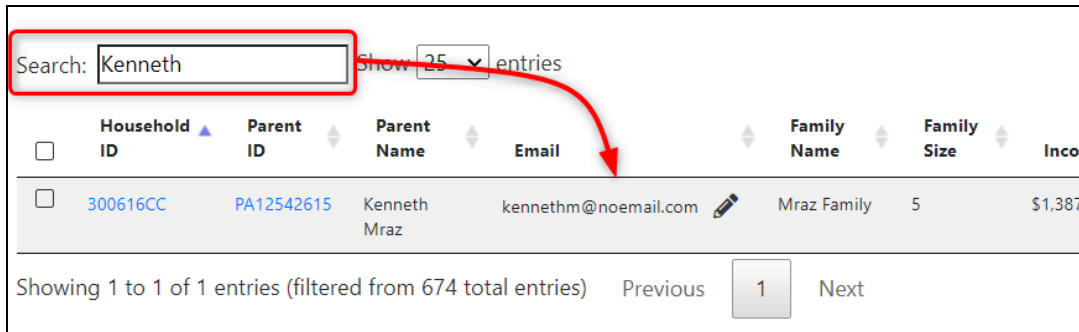

2. Once you have selected all the parents you would like to create a portal account for, click the blue "+Create Portal Accounts" button at the top of the page.
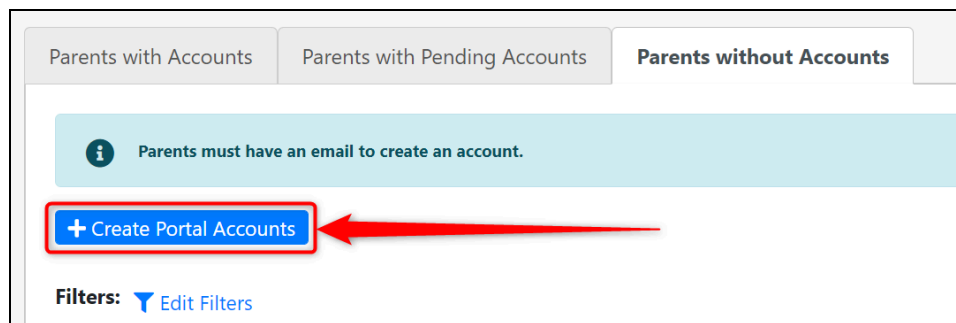

3. In the modal that appears, the number of parents you have selected to create a portal account for will be listed. An email will be automatically sent to each parent with information on how to login and the verification link to lead them to the login page. Click "Save."
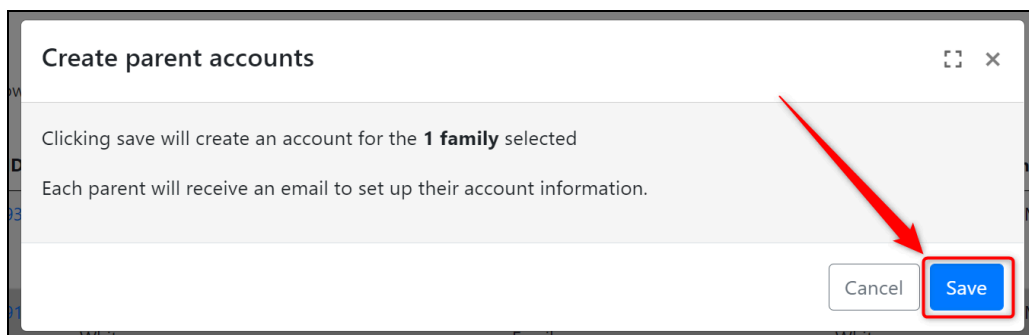
The final 2 tabs displayed on the Account and PIN Management record titled, "Contacts" and "Authorized Pickups" respectively. From these two tabs, you can edit/manage information related to existing contacts or authorized pickups. You also have the ability to generate PINs for all of these Contacts & Authorized Pickups, or remove them all together.
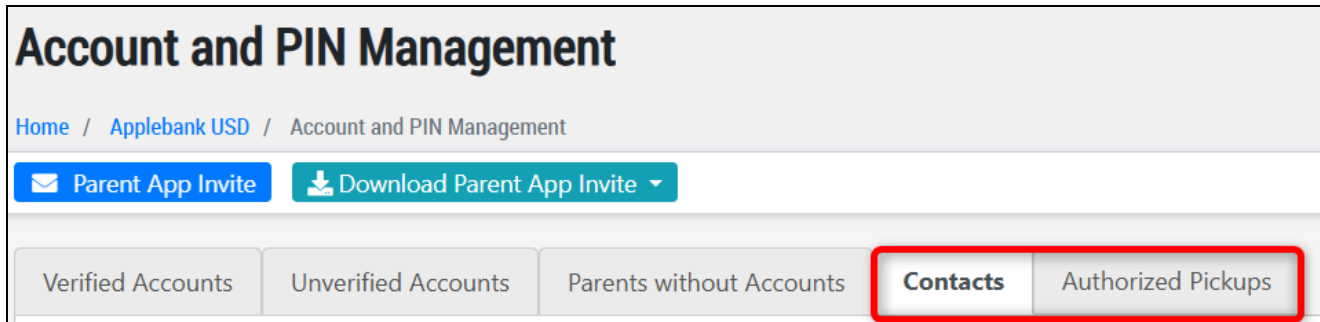
Editing Contacts & Authorized Pickups

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1   From this grid you have the ability to edit the information related to each Contact And/or Authorized pickup. To edit these records, click on the pencil icon in the "Actions" Column of the grid:

2   This will open up the "Update Emergency Contact/Authorized Pickup" modal. From this page, you can edit the information related to the Emergency Contact/Authorized Pickup. Such as changing the designation of the contact, uploading a photo, or adding contact information. If you are happy with changes that you have made to the record, click the blue "Save" button. To cancel any changes made, click on the grey "Cancel" button instead.

Update Emergency Contact/Authorized Pickup

Select the type of contact:
○ Emergency Contact   ● Authorized Pickup Only

Designate if they are an Emergency Contact Or Authorized Pickup Only

Photo
[Upload] [Remove]

Upload or Remove a Photo

Edit General Information and/or their PIN

Authorized Pickup ID	First Name	Last Name
AK001340	Whitney	Torp

Relationship To Child	Phone Number 1	Phone Number 2
Aunt	(555) 538-2796	

Portal Pin
WT1234

Example: AA1234 or 1234

[Cancel] [Save]

Deleting Contacts & Authorized Pickups

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1 From this grid you have the ability to **Delete** a Contact And/or Authorized pickup. To delete these records, click on the trash can icon in the "Actions" Column of the grid:

☐	Actions	Contact ID	First Name	Last Name	PIN
	✏️ 🗑️	EC18476625	Whitney	Torp	WT1234

2 This will open up the "Remove Contact/Authorized Pickup" modal. From this page, you confirm that you want to Delete the Contact/Authorized Pickup. To cancel any changes made, click on the grey "Cancel" button instead.

Remove Emergency Contact

Are you sure you want to delete the Emergency Contact **Whitney Torp**?

[Cancel] [Delete]

1 The PIN is used by the Authorized Pickup/Contact to sign into the eSignature portal to mark their child's attendance when they are dropping their kid off/picking their kid up. You can generate the PIN right from the tab,, as described below.
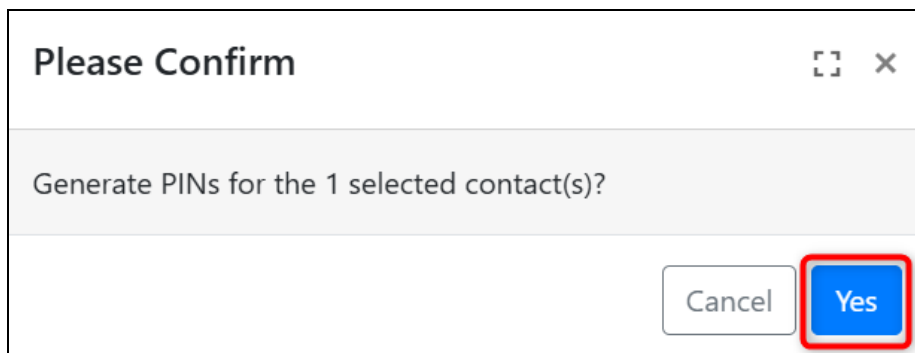
To generate a PIN, first click the checkbox next to all the Contact/Authorized Pickups you would like to generate a pin for. Then click the "Generate PINs" button above the grid.

Please note that you will only notice a checkbox next to a Contact/Authorized Pickups who have a PIN.
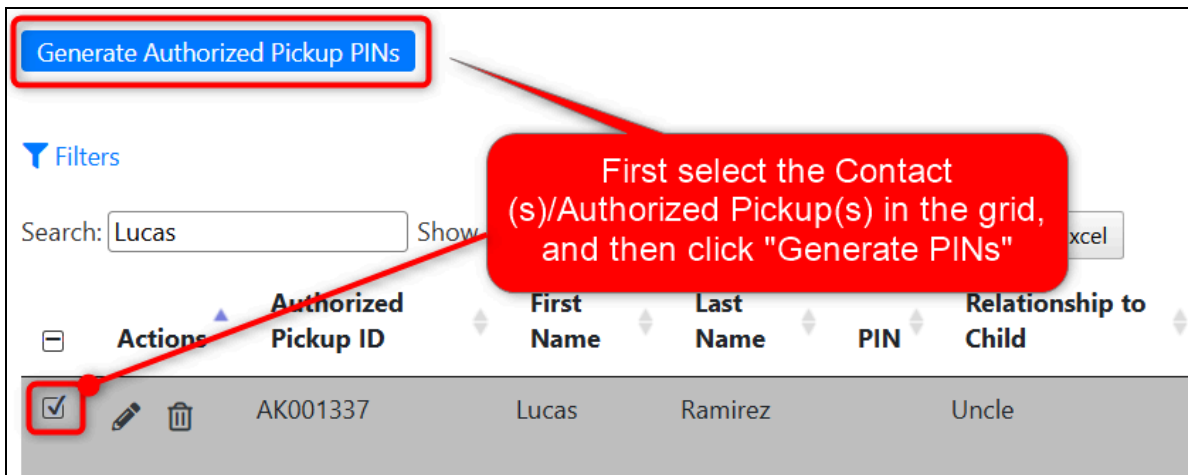
2 In the modal that appears, confirm that you want to Generate a PIN for the selected Contact(s)/Authorized Pickups. Then click "Save."

In addition to managing parent portal account information, you also have the ability to easily share download information for the Hubbe Parent App. The Parent Hubbe App is available on the Apple App store or the Google Play store. From the App, parents can login to their parent portal accounts and view all relevant information from a convenient platform.

In this section we will show you how to quickly and easily share steps on how to download the Hubbe Parent app with your parents. You can do this with an email invite directly from the grid, or through utilization of a PDF download.

1 In order to invite parents to the Parent Hubbe app, click on the blue button at the top of the page labeled "Parent App Invite".
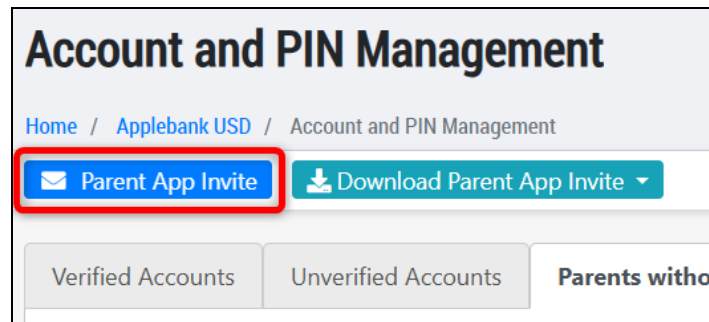
2 A modal will pop up, with fields for Recipients, Subject, Body, and Attachments. By default, there will be no recipients, so you can enter the parent emails in the text field provided.
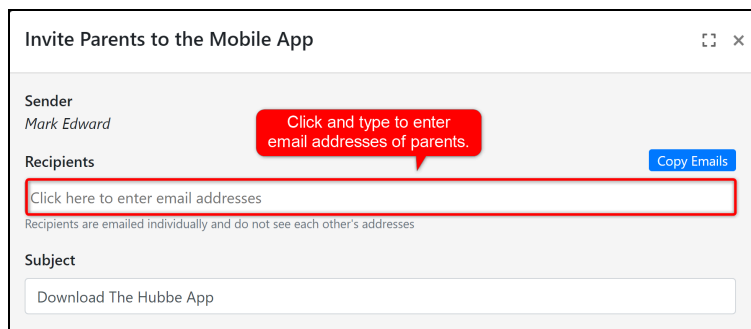

3 You can also enter a subject line for the email as well. By default, the subject line will read "Download the Hubbe App", but this can be edited to whatever you want it to read.
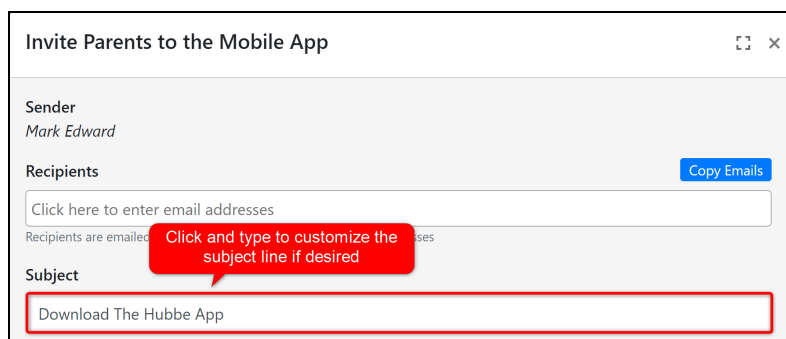
4 To make things easy, there is also a body massage pre-created for you as well. The message will contain your agency logo, as well as a QR code for the parent to scan once the app has been downloaded. Just like for the subject line, this text can be customized before sending out the email. See below for a sample portion of an email inviting parents to the mobile app.
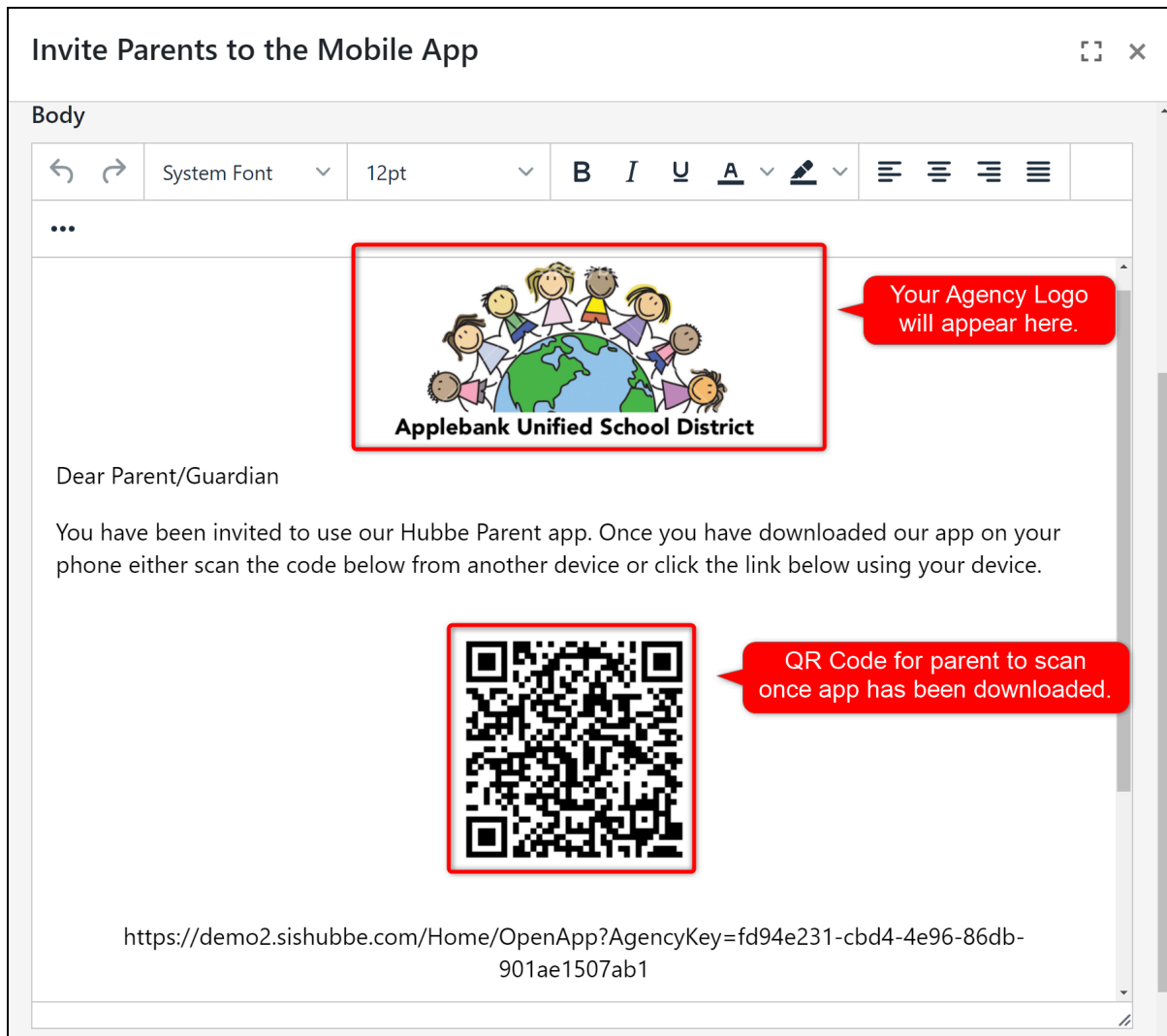

5 You even have the option to add attachments to the invite email before sending as well, just click on the "Choose Files" button at the bottom of the modal, and select the file that you wish to attach.
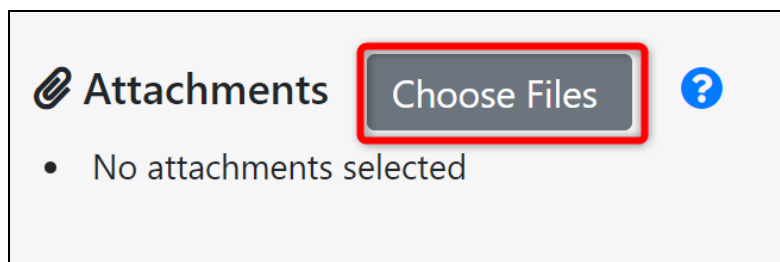
6 When you are happy with your recipient list, subject, body, and attachments provided, you are ready to send the email. Click on the blue "Send" button to send out an email to all your parents inviting them to download the Parent Hubbe app.
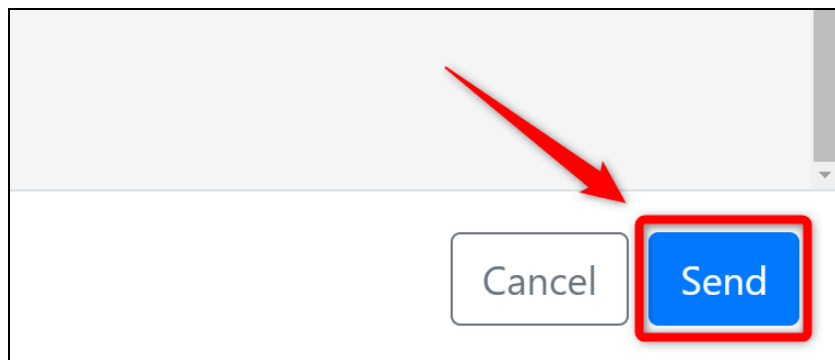
Download Parent App Invite

In addition to emailing users from the grid, you may wish to print out or share a PDF download with them instead. In order to download the PDF for the Parent App Invite, click on the blue button at the top of the page labeled "Download Parent App Invite", and select your desired language.
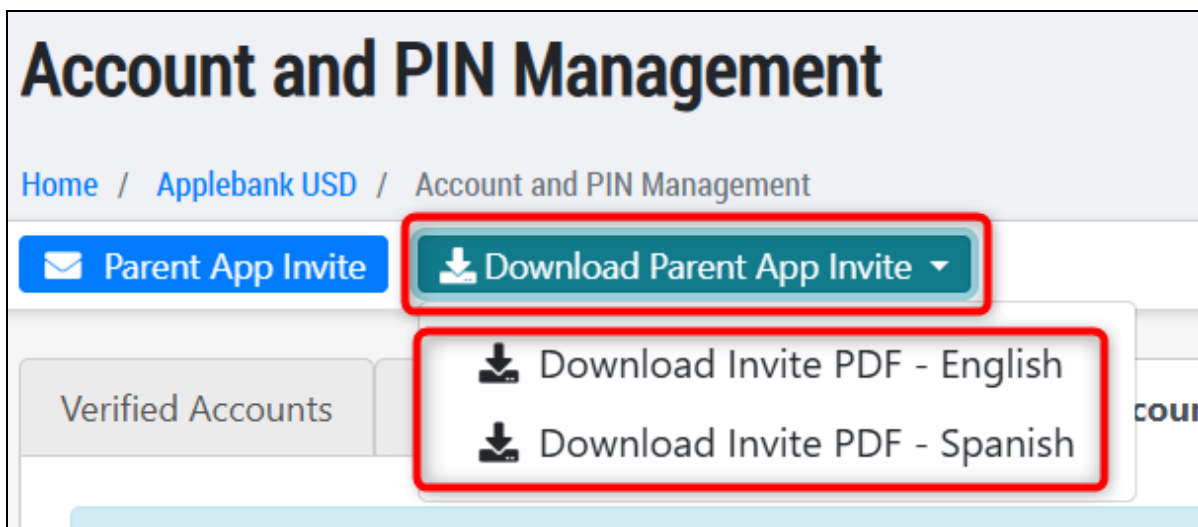
Doing so will download a PDF of the instructions to download the Hubbe Parent app from the Apple App Store or Google Play Store. You can print out this download and share with them or email it to them. You can see an example of this PDF Download on the next page:

Parent Hubbe Invite

Applebank USD

Instructions on how to get the Parent Hubbe mobile app:

1. Open your mobile device's app store
2. Search for "Parent Hubbe"
3. Click "Get" or "Install"

Once you've downloaded the Parent Hubbe mobile app on your device, scan this QR code