

TroubleShooting Parent Portal 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, Agency Admins have the ability to manage parent portal accounts from the **Account and PIN Management** record. 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, reset 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 Family Application Portal and regular Parent Portal Accounts, including how to reset usernames and reset passwords.

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Overview of Parent Portal Accounts

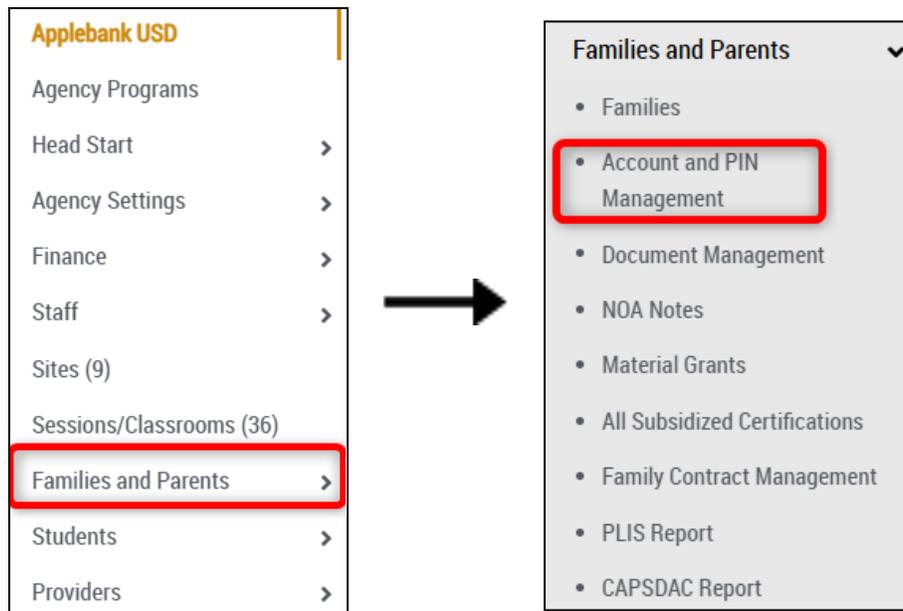
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Navigating to Account and PIN Management

- 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 portal account in your system, including those in a Family Application state, whether the status of the application is Not Started, In Process, Submitted, Revisions Needed, or Approved. There are two tabs housing all accounts: “Verified Accounts” (accounts that have been verified) and “Unverified Accounts” (accounts that have yet to be verified). The “Parents without Accounts” tab lists all the parent records in your system that do not have a parent portal account linked. The Final two tabs are for Contacts and Authorized Pickups. You can create new parent portal accounts right from this record, as well as many other features that will be covered in this instruction sheet.

The screenshot shows the 'Account and PIN Management' page. At the top, there are navigation links: Home / Applebank USD / Account and PIN Management. Below this are two buttons: 'Parent App Invite' and 'Download Parent App Invite'. The main content area has five tabs: 'Verified Accounts' (selected), 'Unverified Accounts', 'Parents without Accounts', 'Contacts', and 'Authorized Pickups'. There is a 'Filters' section with a 'Generate PINs' button. A search bar contains the text 'Family', and it shows '25' entries. There are buttons for 'Copy', 'Excel', and 'Print'. The text 'Showing 1 to 25 of 309 entries (filtered from 316)' is displayed. Below this is a table with columns: 'Actions', 'Email', 'Record Type', 'Household ID', 'Family Name', 'Parent ID', and 'Parent PIN'. The first row of data shows: 'Actions' (with a dropdown), 'andrew+Rena@hubbeinc.com', 'Family', 'HH001151', 'Rowlands Family', 'PA001143', and 'RR6852'.

Overview of the Tabs

Verified Accounts

The “Verified Accounts” tab will list all parent portal accounts at your center/agency that have verified their email addresses and accordingly have full access to their portal account or a family application (once a family application is intaken, parent will gain full access to the rest of the parent portal but are restricted to the family application during the application process for new applicants only).

When a parent portal account is created either by a staff member for a parent or by a parent themselves using an email address, the parent will receive a verification link to verify that this is their email address. Once the parent verifies their email, the account moves from the “Unverified Accounts” tab to the “Verified Accounts” tab.

In the “Verified Accounts” tab, you can perform various actions, such as resetting the email address associated with the portal account, resetting the password, resetting the parent PIN used to sign in to the eSignature Portal to sign their child in/out each day, and disconnecting the account if you wish to block the parent from accessing their portal account or to switch the portal account for this email to a different parent record in your system.

Account and PIN Management

Home / Applebank USD / Account and PIN Management

Parent App Invite Download Parent App Invite

Verified Accounts Unverified Accounts Parents without Accounts Contacts Authorized Pickups

Filters

Generate PINs

Search: Family Show 25 entries Copy Excel Print Showing 1 to 25 of 309 entries (filtered from 316)

Actions	Email	Record Type	Household ID	Family Name	Parent ID	Parent PIN
Actions	andrew+Rena@hubbeinc.com	Family	HH001151	Rowlands Family	PA001143	RR6852

Unverified Accounts

The “Unverified Accounts” tab will list all parent portal accounts that have been created but are not yet verified by the parent. The parent will not be able to access their parent portal account until their email address has been verified. There are limited actions you can take while the account is pending verification, but you can re-send a new verification link from this tab to assist the parent in verifying their account. Once the parent verifies their email, the account moves from the “Unverified Accounts” tab to the “Verified Accounts” tab.

Account and PIN Management

Home / Applebank USD / Account and PIN Management

Parent App Invite Download Parent App Invite

Verified Accounts **Unverified Accounts** Parents without Accounts Contacts Authorized Pickups

An unverified account means the parent needs to verify their account's email address. They can do this by clicking (or copy-pasting into the browser) the verification link under the agency dropdown at the top right of their parent portal homepage. In some cases, you can also manually verify an account in this tab. This is only for accounts that were created from the parent portal's "Create User" page that have passed to verify their portal account themselves.

Filters

+ Re-send Verification Email

Search: Show 25 entries Copy Excel Print Showing 1 to 25 of 72 entries

<input type="checkbox"/>	Actions	Email	Household ID	Family Name	Parent ID	Parent PIN	Parent Name
<input type="checkbox"/>	Actions	Anna.lopez@me.com.BAD	HH15024606	Lopez	PA15024611	AL9132	Anna Lopez

Parents without Accounts

The "Parents without Accounts" tab will list all parent records in your center/agency that are not linked to a parent portal account. This means that the parent will not be able to sign into a parent portal account to access bills and payments, forms to eSign, document checklists, and more. You can create a portal account for these parents right from this grid, as long as they have an email associated with their parent record. Upon creating the account, the parent will receive a verification link in their email. The parent must verify their email address before being able to log in to their portal account.

Account and PIN Management

Home / Applebank USD / Account and PIN Management

Parent App Invite Download Parent App Invite

Verified Accounts Unverified Accounts **Parents without Accounts** Contacts Authorized Pickups

Parents must have an email to create an account.

+ Create Portal Accounts Generate PINs

Filters

Search: Show 25 entries Copy Excel Showing 1 to 25 of 557 entries

<input type="checkbox"/>	Household ID	Parent ID	Parent Name	Email	Family Name	Family Size	Income	Students (DOB)
<input type="checkbox"/>	312189CC	PA312189CC	Alex Singh	alex@noemail.com	Simonis Family	5	\$2,000.00	Chloe Simonis (07/21/14)

Contacts

The “Contacts” tab will list all Emergency Contacts in your center/agency. You can manage the contact details and PIN information right from this grid, for existing contacts. You can also Generate PINs in bulk, for multiple or all contacts at once. **NOTE** that Emergency Contacts With a PIN, will NOT be able to sign a child out, unless they are specifically designated as an authorized pickup.

The screenshot shows the 'Account and PIN Management' interface with the 'Contacts' tab selected. The breadcrumb trail is 'Home / Applebank USD / Account and PIN Management'. There are two buttons: 'Parent App Invite' and 'Download Parent App Invite'. The navigation tabs include 'Verified Accounts', 'Unverified Accounts', 'Parents without Accounts', 'Contacts' (highlighted with a red box), and 'Authorized Pickups'. A 'Generate Contact PINs' button is visible. Below the navigation is a 'Filters' section with a search bar, a 'Show 25 entries' dropdown, and buttons for 'Columns', 'Copy', and 'Excel'. The table below shows one contact entry:

Actions	Contact ID	First Name	Last Name	PIN	Phone 1	Phone 2	Email	Authorized to Pickup	Relationship to Child
	EC18479369	Vanessa	Ambrose	VA7235	555-993-8705			No	Aunt

Authorized Pickups

The "Authorized Pickups" tab will list all Authorized Pickups in your center/agency. You can manage the Authorized Pickups details and PIN information right from this grid, for existing records. You can also Generate PINs in bulk, for multiple or all Authorized Pickups at once.

The screenshot shows the 'Account and PIN Management' interface with the 'Authorized Pickups' tab selected. The breadcrumb trail is 'Home / Applebank USD / Account and PIN Management'. There are two buttons: 'Parent App Invite' and 'Download Parent App Invite'. The navigation tabs include 'Verified Accounts', 'Unverified Accounts', 'Parents without Accounts', 'Contacts', and 'Authorized Pickups' (highlighted with a red box). A 'Generate Authorized Pickup PINs' button is visible. Below the navigation is a 'Filters' section with a search bar, a 'Show 25 entries' dropdown, and buttons for 'Columns', 'Copy', and 'Excel'. The table below shows one authorized pickup entry:

Actions	Authorized Pickup ID	First Name	Last Name	PIN	Relationship to Child	Site Name
	AK001269	Maria	Cruz	MC2352	Family Friend	Birchwood

Troubleshooting & Tips

Parent Receiving “User Not Found” Message

If the parent is receiving a “User Not Found” message trying to log into the portal, they could either be entering the password wrong or they do not yet have a portal account associated with the email address.

- Ask the parent for the email they are using to sign in
 - Go to the **Account and Pin Management** record to see which tab their account lives in
 - Verified Accounts: If their account is listed in the “Verified Accounts” tab, then the user is likely entering the wrong password. Click the blue “Actions” button and click “Reset Password” to send them a link to set a new password
 - Unverified Accounts: If their account is listed in the “Unverified Accounts” tab, then their portal account email address is still pending verification and the parent may be trying to log in or set a password for their account without having verified their account yet. Select the checkbox beside their account and then click “Re-Send Verification Email” so the parent will receive a new verification link.
 - Parents without Accounts: If their account is listed in the “Parents without Accounts” tab, then the parent does not yet have a portal account for this email address. If you wish to give the parent a portal account, select the checkbox beside their name and then click “Create Portal Accounts.” The parent will receive a notification that a portal account was created but that they still need to verify this email address before they can login.

Parent Receiving “Account Not Verified” Message

If the parent is receiving a “Account Not Verified” message trying to log into the portal, then they are likely trying to login or reset/create a password for an account that has yet to be verified. This parent’s portal account will likely be in the “Unverified Accounts” tab of the **Account and Pin Management** record. You will need to re-send them a new verification link to get them to verify their email address associated with the portal account.

- Ask the parent for the email they are using to sign in
 - Go to the **Account and Pin Management** record to see which tab their account lives in
 - Unverified Accounts: If their account is listed in the “Unverified Accounts” tab, then their portal account email address is still pending verification and the parent may be trying to log in or set a password for their account without having verified their account yet. Select the checkbox beside their account and then click “Re-Send Verification Email” so the parent will receive a new verification link.

Parent Never Received a Verification Link

If the parent is reporting that they never received a verification link, there are a few things to check to make sure they should be receiving the verification link:

Things to Confirm with the Parent:

- Please confirm this is the correct email address (no spelling errors and this is the one you are checking the inbox for)
- Please confirm this email address is actively receiving emails
- Please look in your “Spam” folder for an email from noreply@hubbeinc.com
- If the parent still does not see a verification email, you will need to send a new verification link to be sent to their portal account email address

Re-Sending a Verification Link:

1. Ask the parent for the email they are using to sign in
2. Go to the **Account and Pin Management** record and click into the “Unverified Accounts” tab
3. Select the checkbox beside their account and then click “Re-Send Verification Email” so the parent will receive a new verification link from noreply@hubbeinc.com

Parent Having Trouble Logging In

If the parent is reporting issues logging into their parent portal, they may need to reset their password, or their account may still be pending verification, or they do not yet have a parent portal account associated with the email address.

- Ask the parent for the email they are using to sign in
 - Go to the **Account and Pin Management** record to see which tab their account lives in
 - **Verified Accounts:** If their account is listed in the “Verified Accounts” tab, then the user is likely entering the wrong password. Click the blue “Actions” button and click “Reset Password” to send them a link to set a new password
 - **Unverified Accounts:** If their account is listed in the “Unverified Accounts” tab, then their portal account email address is still pending verification and the parent may be trying to log in or set a password for their account without having verified their account yet. Select the checkbox beside their account and then click “Re-Send Verification Email” so the parent will receive a new verification link.
 - **Parents without Accounts:** If their account is listed in the “Parents without Accounts” tab, then the parent does not yet have a portal account for this email address. If you wish to give the parent a portal account, select the checkbox beside their name and then click “Create Portal Accounts.” The parent will receive a notification that a portal account was created but that they still need to verify this email address before they can login.

Manually Verifying a Portal Account

The verification process for a new portal account includes two steps: verifying the email address and setting a password.

Agency Admins can *manually* verify a parent portal account **only for parents who created their own parent portal account from the parent portal's "Create User" page.** This is because the parent will have already set their password if they created their own portal account from the parent portal's "Create User" page, completing the "setting a password" part of the two-step process. Accordingly, you can then *manually* verify their account from the ***Account and Pin Management*** record and then they will be able to login with their username (email) and password that was already set. **You should only manually verify if absolutely necessary.** The parent will ideally be able to verify their own account to ensure it is the correct and desired email address.

If you created a parent portal account from the staff side, such as by clicking "Create Portal Account" from the "Parents without Accounts" tab or clicking "Setup Portal" on a parent record, then you will **not** be able to manually verify the account because the parent has not yet setup a password. This is why you may not see the "Verify Account" option for all of the accounts listed in the "Unverified Accounts" tab of the ***Account and Pin Management*** record.

Manually Verifying a Parent Portal Account:

1. For an account that was made by the parent from the parent portal's "Create User" page, you can manually verify the account. No other accounts will be able to be manually verified by staff, they will only be able to be verified by parents.
2. Ask the parent for the email address associated with their account
3. Go to the ***Account and Pin Management*** record and click into the "Unverified Accounts" tab
4. Search for the parent's email using the search field
5. Click the blue "Actions" button beside the parent's email and then click "Verify Account" in the drop-down
6. The parent will receive an email notification that their account was manually verified by staff and will be provided to login with a link to the portal, using the password they already set. If they need to reset their password, a "Reset password" link will also be included.

Parent Wants to Change Email for Portal Account

If the parent wishes to change the email address associated with their parent portal account, you can change this from the **Account and Pin Management** record. **You can only change the email for accounts that have been verified already.** If you set up a portal account for a parent using the wrong email or a misspelled email but it is still pending verification, you can select “Disconnect Account,” edit the email address, and re-create/set up the portal account for the parent.

Changing the Email Associated with a Portal Account:

1. Ask the parent for the email address associated with their account
2. Go to the **Account and Pin Management** record and click into the “Unverified Accounts” tab
3. Search for the parent’s email using the search field
4. Click the blue “Actions” button beside the parent's email and then click “Verify Account” in the drop-down
5. The parent will receive an email notification that their account was manually verified by staff and will be provided to login with a link to the portal, using the password they already set. If they need to reset their password, a “Reset password” link will also be included.

Switching a Portal Account to a Different Parent Record

If a portal account exists and is linked to the wrong parent record in your system, you can easily disconnect the portal account from the parent record and “link” it to the proper parent record. This may happen if you wish to switch which parent record in a household is linked to the parent portal account for the family’s email address. During this process, the parent portal account will stay verified and maintain the same password that was set before disconnecting, so the parent can login with the same login credentials that existed for the account before disconnecting, but will be linked to the new parent record. If they need to change the password associated with the account, the email sent to the parent will include a “Reset Password” link.

Switching a Portal Account to a Different Parent Record from the **Account and Pin Management** record:

1. In the “Verified Accounts” tab, search for the parent you wish to disconnect from the portal account using the search field.
2. Beside the parent’s email, click the blue “Actions” button and then select “Disconnect Account” in the drop-down.
3. Go to the “Parents without Accounts” tab and search for the parent you wish to connect to the portal account using the search field.
4. If they already have the email address entered on their parent record, you can select the checkbox beside their name and click the “Create Portal Accounts” button. If they do not yet have the email entered on their parent record, you will need to first click the pencil in the “Email” column and enter the email address. Then you can select the checkbox beside their name and click the “Create Portal Accounts” button.

5. The parent will receive an email notification that their parent portal account is ready. The same login credentials that existed for this account before will still be set for this account (i.e., email username and password). The parent can click the link to the portal in the email and login with the same credentials, or they can click the “Reset Password” link also included in the email notification to change the password.

Switching a Portal Account to a Different Parent Record from the **Household** record:

1. On the parent record you wish to disconnect from the portal account, click the “Disconnect from Portal” option below the portal account email.
2. Navigate to the parent record you wish to connect to the portal account. If their parent record already has the email entered, you can click the blue “Setup Portal” button. If they do not yet have the email entered on their parent record, you will need to first click the blue “Edit” button beside “Parent Information” and enter the email address. Then you can click the blue “Setup Portal” button.
3. The parent will receive an email notification that their parent portal account is ready. The same login credentials that existed for this account before will still be set for this account (i.e., email username and password). The parent can click the link to the portal in the email and login with the same credentials, or they can click the “Reset Password” link also included in the email notification to change the password.

Removing Parent’s Access to the Parent Portal

If you wish to remove a parent’s access to their parent portal account, you can disconnect the portal account from their parent record. Linking a portal account to a parent record essentially grants a parent access to the household information in which the parent record exists in your system. The parent will be able to see the students, parents, and emergency contacts in their portal, as well as sign documents, upload documents, pay family fees, view past family applications, message staff, and more. Disconnecting a portal account from a parent record does not remove the portal account altogether, but upon logging in, the parent will not be able to view the household information any longer - they will only be able to access the family application portal which is open to all portal accounts.

Removing a Parent’s Access to their Parent Portal Account:

1. On the Account and Pin Management record, click into the “Verified Accounts” or the “Unverified Accounts” tab.
2. Search for the parent using the search field.
3. Click the blue “Actions” button beside their email and then select “Disconnect Account” in the drop-down.
4. The parent record will be disconnected from the portal account so upon logging in with the same login credentials, the parent will no longer see the household information or be able to access the main parent portal. They will only be able to see the application portal, which is open to all portal accounts, even ones that are disconnected from an existing parent record.

Family Applicant Account Not Yet Verified

If you have created a family application, or if the parent has created a family application, and the portal account associated with the application is still not verified, you will notice a “Not Verified” badge beside the application’s email in the ***Applications and Waitlist*** grid. You can remind the parent to verify their account by sending them a new verification email in one of two places:

On the ***Account and Pin Management*** record:

1. Click into the “Unverified Accounts” tab.
2. Select the checkbox beside the email and then click the “Re-send Verification Email” button.
3. The parent will receive a new verification email with a verification link that will lead them to the family application portal. Upon clicking the verification link in the email, they will be prompted to set a password, and then will be led into their application. The “Not Verified” badge beside the application will go away and the account will move to the “Verified Accounts” tab.

On the ***Applications and Waitlist*** grid:

1. Select the checkbox beside the application in the grid, and then click the blue “Actions” button near the top of the tab.
2. In the drop-down, select the “Send Reminder Email” option.
3. A pop-up modal will appear in which you can customize a message sent to the applicant. A new verification link will be automatically added to the email message that the applicant receives. Upon clicking the verification link in the email, they will be prompted to set a password, and then will be led into their application. The “Not Verified” badge beside the application will go away and the account will move to the “Verified Accounts” tab of the ***Account and PIN Management*** record.

Staff Receiving Message that Account Already Exists

If a staff member is receiving some form of the message that a portal account with the email already exists, there is another parent record or family application that already uses this email address for a portal account in your system. Some of the actions that may lead to this warning message are: trying to create a new application, trying to send an ELCD-9600 form to the parent portal (or any other form, such as an income declaration or family contract), or trying to create a new portal account for a parent record. The portal account for this email address that already exists will block you from being able to complete this action so long as you continue to use the same email address. There are several options of how to resolve this issue, listed below.

If the account is connected to another parent record:

- Use a different email address to complete the action, which will create a portal account for the parent with that new email address, or
- Disconnect the portal account from the parent record it is currently linked to so you can then complete the action and effectively “link” the portal account to the new parent record

If the account is connected to another family application:

- If the household record for this family already exists, you are receiving this message because the family is not “New” so you should be using the “Invite Families to Re-Apply” option rather than “Create Application for New Family” option.
- If the household record for this family does not yet exist so the portal account is only associated with another family application in your system, you can either:
 - Re-purpose the family application connected to this account if the application is not longer needed for historical record. Select the checkbox beside the application and then click the blue “Actions” button near the top of the tab. Click the “Send Reminder Email” in the drop-down and then you can type out your own custom message to the family to apply to the agency and to change any data previously entered if it has changed before submitting the application.
 - Delete the application connected to this account so you can then “Create Application for New Family” if the application is obsolete or not needed for historical record. To do this, click on the status of the existing application and then click “Delete Application” in the drop-down. You will then be able to invite the family to apply as a new family using the “Create Application for New Family” option.

Authorized Pickup/Contacts Need a PIN

If either your (Emergency Contacts) or Authorized Pickups are in need of a PIN code to sign in/out their respective child:

On the **Account and Pin Management** record:

1. Click on either the “Contacts” or “Authorized Pickups” tabs
2. Select the person on persons that you wish to generate a PIN code for, by highlighting the box in the far left column
 - a. To Select ALL Contacts or ALL Authorized Pickups, click on the box header at the top of the column
3. Click on the Blue “Generate Contact PINs” button and/or “Generate Authorized Pickup PINs”
4. Confirm the number of PINs that you wish to create by clicking “Yes”
5. The respective number of PINs have been generated
6. **[If needed]** observe PIN information in the column labeled “PIN”
7. **[If needed]** Edit PIN code or other information by clicking on the Pencil Icon in the “Actions” Column