



2016/2017 School Portal Start Up Checklist

Step	Description
1.	Confirm student email address are loaded for students <ol style="list-style-type: none">1. Student Top Tab, Filter: Primary Active Students, Field Set: SD73 User Accounts2. Sort by Email1 column: look for blanks or email addresses that do not conform to district standard (firstname.lastname@student.sd73.bc.ca). Do NOT CHANGE the email address.3. Email that list to Brad/Siobhan
2.	Remove portal access for parent contacts for ALL graduated students <ol style="list-style-type: none">1. Filter: All Students, Field set: Default, Sort by EnrStatus: select graduated students2. Contacts side tab, use field set: SD73 User Account3. Options, Modify List, Change PortalAccess to N for all records for that student
3.	Check parent contact emails on primary active students <ol style="list-style-type: none">1. Filter: Primary Active Students2. Contacts side tab, use field set SD73 User Account3. Inspect Email1 field: make sure that it is a properly formatted email address (and matches the email address on the verification sheet?)4. If parent contacts have the same email address, make on parent contact have PortalAccess=Y and the other PortalAccess=N5. Verify/Modify who has access to this student's information within the portal
4.	Communicate with parents/guardians regarding accounts, access, etc.
5.	Email Brad/Siobhan saying that you have completed the School Portal Checklist