



Family Portal (LineLeader) Practice Checklist

Click [here](#) to download

AM: FIRST = make sure all site's accounts activated beforehand

- ☐ **1. Show how to login**
a. www.rightatschool.com/portal (AM has password information)
- ☐ **2. Show how to add staff**
a. Manage > People > +Add > (First & Last Name, Type = Staff, no email, Default Group = Right At School > Save
- ☐ **3. Show how to check self and staff in**
a. Search > Staff Name > Check-In > Check-In at bottom > Ok > Dashboard
- ☐ **4. Show how to check students in (before & after school)**
a. AM: Remind PMs - you'll want to plan to be at the family check in/out table to help families download the Right At School App (show flyer) >
b. Before School: Once families have the Right At School App, they can use the QR Code to check their kids in. Families click on the QR Code icon on the top right of their app dashboard and select "QR Code Check in/out. Families scan the QR Code using the in-app camera (on your site laptop or printed sign) and select "Submit". As an alternative, they can also check in using their PIN, but we recommend using the QR Code.
c. Need printed site QR code? Manage > People > PIN Check In > save image as & drop in Canva/Google Doc
d. After School: Electronic: Right At School (blue text) > Not Checked In > Check-In at bottom > Ok. If need Paper: Reports > Attendance Grid by Date > date > schedule type (can select multiple) > update.
- ☐ **5. Show How to find family PIN Codes**
a. Search > type in Family name > click "Manage" > scroll down to see PIN code
b. Can also run a Profile Report = Reports > Profile Report > Type = Family > Field = Pin Code
- ☐ **6. Show how to use a punchcard if a family has forgotten to pre-schedule (or is telling you they will use in the future):**
a. Search > student name > Scheduling > If parent/guardian doesn't pre-schedule, click on "preschedule" and put in the correct date (it can be today's date)
b. (If pre-scheduled, students who have a scheduled punch / drop-in for that day, will appear on your daily roster)
- ☐ **7. Show how to find and print Contact Roster**
a. Reports > Contact Roster > Update (print regularly as needed for updated info)
- ☐ **8. Show how to find and print Medical Info Report**
a. Reports > Profile Report > Fields = Allergies, Important Notes, Special Needs > Update > Export CSV > Open in Google Sheets (this is your Medical Info Report)
- ☐ **9. Show how to send Announcements/Messages and Notifications**
a. Announcements and Messages will only alert those with activated Portal Accounts. Notifications are to use when you need to notify all parents. Whether they are activated or not.
b. Messages (to connect with specific people, for ex: "need child's forms") = Message icon > New Message > Choose recipients > fill Subject > fill Body > Send
c. Announcements (to quickly communicate with ALL families/staff, for ex: "pick-up door change") = Content > Announcements > Add > Create > Save (to edit, click 3 Dots > Edit)
d. Notifications (to send urgent & crucial messages, for ex: "school emergency closure") = Moments (+ icon) > Moment Type (Notification & "Tag everyone") > Moment Details (Check all the boxes for Email, SMS, and Push) > fill with templated copy from the Family Engagement doc > Click "Yes, send it!" > Email will be sent from donatreply@rightatschool.com

RAS Family Portal Practice
All PMs open laptops (share screens if need)



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