

Parent Portal Handbook
2022-2023

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Intake Team and Service Coordinators | Setup

- Verify if the parent has current Parent Portal Access and/or has access to a computer or smartphone for the intake appointment.
- Have the parent set up the Parent Portal account while you are on the phone with them.**
- On the Registry screen, in the Parents section, set up a Parent Portal account for the child's parents.
 - Parent 1 and Parent 2 on the Name line
 - Have the Parent(s) decide who will sign forms in Parent Portal
 - If each parent wants/needs to sign, each parent will need their own information box on the Registry page in the Parents section.
 - ***Note: If you are a service coordinator setting up the account and need for the parents to have their own accounts, please ask your site based administrative assistant to make the necessary registry page changes to support this.
 - Click the pencil icon next to *No Parent Portal account*
- Click *New Portal Account* button
- Enter the parent's first name and last name and the email or phone number they will use to login into the account.
 - *** Note: They must pick one method. If they choose email, the parents will receive email notifications. If they choose a phone number they will receive text notifications.
 - ***Note: email notifications take longer to receive, text is recommended.
- Click *Create*
- The parent will receive a text or email notification to set up a Parent Portal account. This may take a few minutes for the parent to receive.
 - *** Note: Parent passwords need the following criteria:
 - 8 characters long and
 - must include any three of the following: uppercase letter, lowercase letter, numbers, punctuation, or
 - be longer than 12 characters
- A parent with multiple children can set them all up using one Parent Portal login by assigning the same login (email or phone number) on each child's parent record.
- If a parent needs to recover their password, you can assist them.
 - Click on the pencil and select "manage account."
 - On the Manage Account tab, select the "send forgot password text message" so that a new password can be created.
- Document the portal creation in the contact log as part of the intake conversation template (last line). If a portal account is not created during intake conversation, please note why not (i.e. the parent refused, the parent didn't have time or tech access, etc)

Evaluation Team | Paperwork Process

- Verify that the parent has Parent Portal set up and/or give [directions on how to set up](#)
- Create **Prior Notice About Evaluation Form/Consent for Evaluation Form**
 - Right before you send it, add an annotation at the bottom of the form (see example verbiage below)
 - You don't have to archive the form prior to sending it to the signature page, you can just push the *Send to Signature Page* button
- Have the signing parent sign into their account.
- Have Parent(s) sign the **Evaluation Form/Consent for Evaluation Form** through Parent Portal
- During the break, prep the **Eligibility Statement** and both evaluators sign.
 - If writing IFSP, prep the **IFSP Team Page**
- After evaluation, review **Eligibility Statement** with Parent (share screen)
 - Evaluators sign **Eligibility Statement**
 - Send to family through Parent Portal (click the *Send to Signature Page* button)
 - Archive after all required signatures have been collected.
- Complete IFSP with parents
 - EI: Complete and walk the parent through the **IFSP Team Page**, then send to parent to sign via Parent Portal through the Form Collections on Signature Page. **Click on the blue pencil icon next to the form title and select where the parent should sign, EI and/or ECSE section. If you do not do this, it will not allow you to send it to the parent.**
 - Archive once parent signs
- Complete the **Insurance Consent form** and send it to parents to sign.
 - *** Note: For ECSE children, also send the Insurance Notice from the Archive page
- If you need to get a ROI form (**Mutual Exchange Form**), get signatures from the parent in the Parent Portal.
 - *** Note: You can only send a parent one ROI at a time. You will need to send subsequent ROIs after you've received the signed copy back and archived it.
 - ***Note: HIPPA forms require a wet signature and should not be obtained through the parent portal.
- For combined EI/ECSE evaluations, prep the **Prior Notice and Consent for Initial Provision of Special Education Services**, send to the Signature Page, and then send to the parent from the Signature Page.
- At the conclusion of the Evaluation/IFSP Meeting, complete and review the **Prior Notice of Action Form**, archive and send to the family from the Archive while in the meeting, or directly after the meeting.
- Send **Parent Resources and Bell Curve/Evaluation Summary Form** through Uploaded

documents in Archive

- When sending documents for “Review” (not for a signature), you have to give them a *Form group name*
- In *Optional Comments*, include a message and the list of documents that you are sending
 - *** Note: You can expand the field by clicking and dragging the diagonal lines at the lower right-hand corner.
- Any additional handouts or links to websites can be sent via email.
- Copy and paste the optional comments into the Contact Log
- Document meeting in the Contact Log
- Within 10 days, complete Evaluation Report and IFSP, share copies with parents from the archive tab; copy and paste your optional comments into the Contact Log.
- Follow the distribution process and note in the Contact Log.

Service Coordinators | Parent Portal Process

- Verify that the parent has Parent Portal set up and/or [set up their account with them](#)
 - Verification is accomplished by: clicking on the Parent Portal pencil icon on the Registry page. Select the “manage account” option.

The screenshot shows a form for managing a parent's account. At the top, there are dropdown menus for 'City, State Zip' (St. Helens, OR 97051) and 'Mailing Address' (checked 'Same as Street Address'). A 'Notes' field contains the text '6/18/20-declined to add dad's # as he is working most of the time'. Below this, a 'Portal account' section shows 'Carrie Ruggles' (username: 5033698690) with a 'login enabled' status. A 'Parent settings' dropdown menu is open, showing options like 'Allow [redacted] to e-sign for this child' and a 'Manage account...' button, which is circled in red. Other options include 'Other children visible to this account' (listing 'NWR, ESD') and 'Unlink parent from this account'.

- In the Account Management screen, verify that the setup status is complete. If the set up has not been completed, assist the parent is getting it set up. Until the account has been set up has been completed, you will not be able to send forms using the Parent Portal.

The screenshot displays the 'Portal Account Details' page. It shows a table of account information: 'Login enabled' (Yes, with a 'Deactivate ...' button), 'Created by' (Stacy Rager), 'Setup status' (complete (1)), and 'Most recent activity' (09/27/22). Below this, there are input fields for 'First name' and 'Last name', and a 'Login email/cell' field with a 'Save login' button. A section for 'Send forgot password text message' includes a signature for the message: 'Northwest Regional ESD | (503) 614-1428' and a 'Send forgot password text message' button. At the bottom, a 'Detailed status:' section lists: 'Account claimed: Yes', 'Agree to view and sign forms: Yes, 09/26/22 03:07 PM', 'Agree to view archived PDF forms: Yes, 09/26/22 03:07 PM', and 'Chosen a password: Yes'. A red arrow points to the 'Account claimed: Yes' status.

- Create **IFSP Meeting Notice**,
 - Archive* and send to family through Parent Portal with the **Procedural Safeguards**
 - Document in Contact Log
- Prepare document drafts and pages needing signatures and *Archive* each document. See the [EI/ECSE Distribution Template Guides](#) for a comprehensive list of which forms are needed

and which should be prepped and sent using the Parent Portal.

- Send pages needing signatures to Parent Portal Signature Management. Please remember once the parent signs the document it can not be changed.

*** Note: Don't predetermine goals or service

- Get signatures from family in the Parent Portal. Archive the document once the parent has signed.

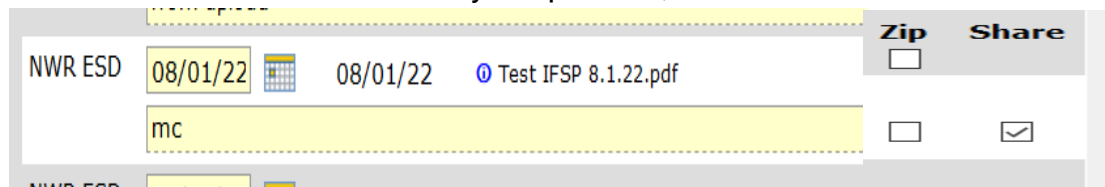
***Note: You can only send a parent one Mutual Exchange at a time. You will need to send subsequent ROIs after you've received the signed copy back and archived it.

***Note: HIPPA forms require a wet signature and should not be obtained through the parent portal.

- At the conclusion of the IFSP Meeting, complete and review the **Prior Notice of Action**,
 - Archive* this form and send to the family in the Parent Portal (from the Archive tab) while in the meeting or directly after meeting.
- Document IFSP meeting in the Contact Log.
- Follow distribution process in the [EI/ECSE Distribution Template Guides](#) that corresponds to the type of meeting that was held.

Distribution Process

- Create batch print with all required/requested documents
- Go to Forms > Archives and download PDFs of all docs signed via the Parent Portal
- Replace unsigned docs and merge signed docs into the batch print
- Go through the review process
 - A. Send corrections back to service coordinator
 - B. No corrections needed
- Once you receive corrections, replace any documents that have been corrected and add a parent portal letter.
- Label ([naming conventions](#)) and upload file into the child's archived files
- Send to parents via Parent Portal
 - Go to Forms > Archive to the document you uploaded; check the share box



- Fill out the group name with the paperwork type and name:

Share documents to parent portal

Form group name:

Optional comments:

- Click box next to recipient and click *send forms* (Goes to Parent Portal under Document Archive folder)

- Document in the contact log that the file has been sent via Parent Portal

*** Notes:

- Forms in Spanish cannot be sent for signatures
- Parent Portal Handbook: EcWeb, user tab, training tab
<https://ecweb.uoregon.edu/e3k/user/training>

Unlinking and/or Deactivating:

Unlink: Unlink removes the ability for the adult to view or sign any documents related to that child, but leaves the Parent Portal account active. This is helpful for resource parents who may need to see other children, but not the child that is no longer in their care.

Deactivate: Deactivating means that the parent can no longer access the portal using the email or phone number attached to the account

Training Resources

- [YouTube Video tutorial \(14 min\)](#)
- [Training Slide Deck](#)

FAQs

When do I have to start using this?

- As soon as you complete the training, or no later than Nov. 1

Can we still have families sign paperwork at virtual meetings or do all signatures have to go through the parent portal?

- If the parent has the technology, they should be using the Parent Portal. In those (hopefully) rare occasions where they cannot access the Parent Portal during the meeting, they can sign in ecWeb if they are able to give the parent remote control so they can sign the form using the mouse or touchpad on their computers. Obtaining signatures via Zoom chat or email are no longer allowable.

Is it recommended that we set these up with parents or set them up and then email them to complete the process?

- It is recommended that you set them up and complete the process in person (or in a virtual meeting or by phone), using your iPad or their mobile device to ensure that everything works correctly and that they sign the forms.

Reminder of the start date for the parent portal

- Everyone needs to be using it by November 1, 2022.

I have parents who both want access. How do I get them into two boxes on the registry page?

- Talk to your site Admin Assistant. They can assist you with this process.

What will families see on their end? Can they see service logs?

- They will only see the forms that are shared with them.

What about HIPPA?

- Medical agencies generally do not accept electronic signatures. They require "wet" signatures.

Can Parent Portal be used for PALS?

- No. Parent Portal is only used to send SPED- specific forms requiring signatures. The PALs are children who are not in services, so there is no need for them to have a Parent Portal account.

Can you review why the Team Page doesn't have a *Send Form to Signature* option?

- ecWeb allows the parent to sign while still keeping the form within the IFSP packet. From the Sigs tab, in the Forms Collection section, use the **IFSP - Team Page Only** form to add a place for parent signature.

If a parent chooses notifications via text, can they still access the Parent Portal other ways (i.e. a laptop)?

- Yes. They can access the Portal using their phone, tablet, or computer. How they choose to receive notifications drives their username to log in. They will either log in using their email address or their phone number:

EI/ECSE Parent Portal

Welcome

Login with e-mail
Login with mobile number

Email Address

Password

Login
[Forgot your password?](#)

What are the directions for changing text to email for parents?

- Parents can make the change themselves in the Portal by clicking on *Settings* and then *Change Login ID*, or we can do it for them in ecWeb by clicking on the blue pen next to their Portal account on the Registry page, and then clicking on *Manage Account*.

Will the text message have a link for them to sign in?

- If they sign up by text they will receive a link to sign in, just like the one they would receive if they had signed up using email.

It would be nice to have a handout to explain to parents why we are asking them to use the Portal and what it is.

- I think that a half-pager might be nice and am happy to develop one.

What happens if a parent refuses to use this platform, for any reason?

- This would be a pretty rare occurrence if it happens at all. Talk to your administrator if this should ever come up.

Do we know when we will have it in Spanish?

- No date has been shared. We will keep you posted.

Do we get a notification when parents set up the account?

- You won't receive an email but you will see that the Registry page will now say *Portal Account Enabled*.

Are you anticipating that each family will have this set up prior to evaluation? Or will evaluators have to walk parents through this process during evaluations?

- This may vary from site to site, but Intake will generally set up the Parent Portal during the initial conversation. It is a brief enough process that it could be done at the evaluation if needed.

If a parent is joining the meeting via Zoom on their phone, are they able to use the Parent Portal on the phone at the same time?

- They should be able to.

Thinking about the flow of IFSP meetings, would you recommend sending all documents requiring signatures to the Parent Portal before the meeting, one at a time during the meeting as you explain each one, or send them all after?

- Don't send them before as we don't want the parent signing before the meeting. It makes sense to have all the forms needing signatures prepared so that they can be pushed to the Portal at the end of the meeting as a group, and then you can sit with the parent as they go through the forms and sign in the Portal.

Do you know if the parent portal will eventually be translated into other languages besides Spanish?

- It will not.

How do parents access Parent Portal after the initial text/email?

- They can refer to a prior email or text for the link or go directly to the portal at ecparent.org.

What if the parent needs tech support? What are the steps?

- Reach out to your Instructional Coach, site-based Administrative Assistant, or your Supervisor if there is an issue that you are unable to resolve. It may request support from ecWeb; however, making that request should come from the Administrator.