

PINPOINT 15 GRADEBOOK

Technology Information Services



Parent Portal Letter -

Print and Mail Merge instructions

v15.3.1.3



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Parent Portal Letter - Print and Mail Merge instructions

Technology Information Services
520 S. Appleyard Drive
Tallahassee, Florida 32304
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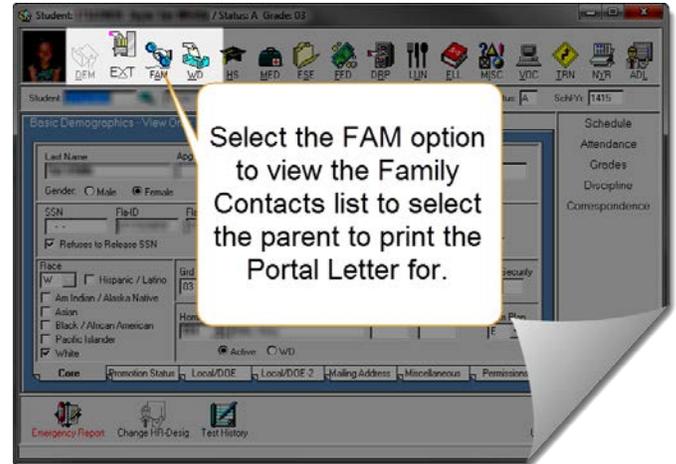
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Printing a Parent Portal Letter (Single)

Periodically there is a need to print an additional letter for an individual student. If you are only needing a few letters for specific students, then it is easiest to print them directly from Genesis Red School House.

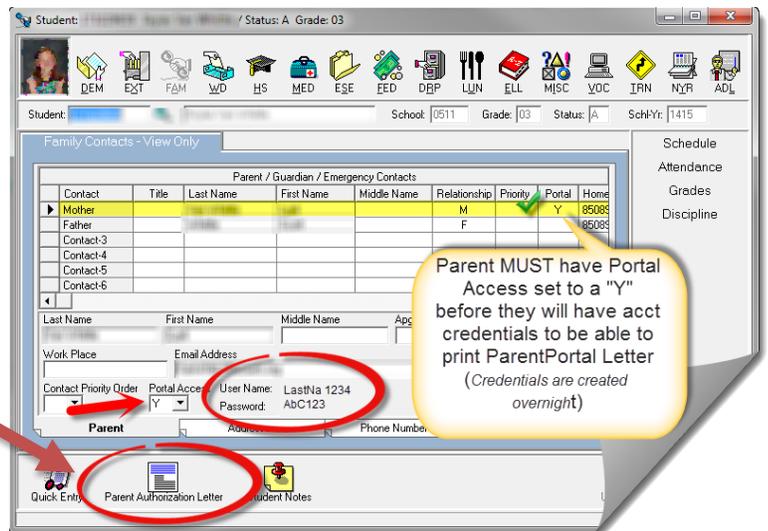
Locating Family Contact Information

1. Click on **School Search**
2. Search for the student by students name
3. Select the student you are needing the Parent Portal letter for from the available students in the list



Account Credentials

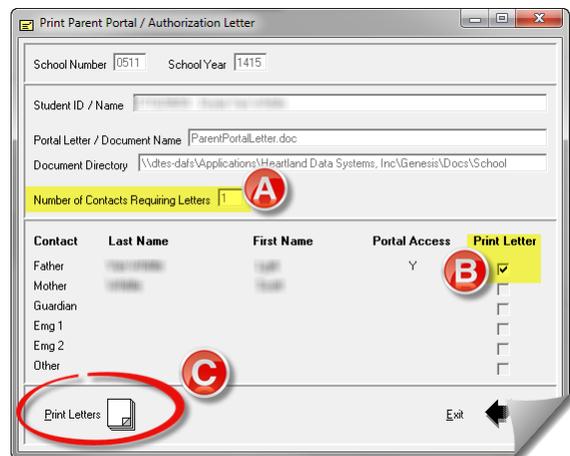
1. On the Family Contacts screen, select the Parent that has a "Y" set under the Portal column.
2. The Parents credentials will show at the bottom of the grid view*
3. To print the Parent Portal letter, click on the **Parent Authorization Letter** icon at the bottom.



4. The **Print Parent Portal / Authorization Letter** Dialog box will display.

Select the options that you need

- a. # of Contacts requiring Letters
- b. Which acct credentials
- c. Then print the letters



Printing a Parent Portal Letter (Mail Merge / Mass Print)

Parent Related info:

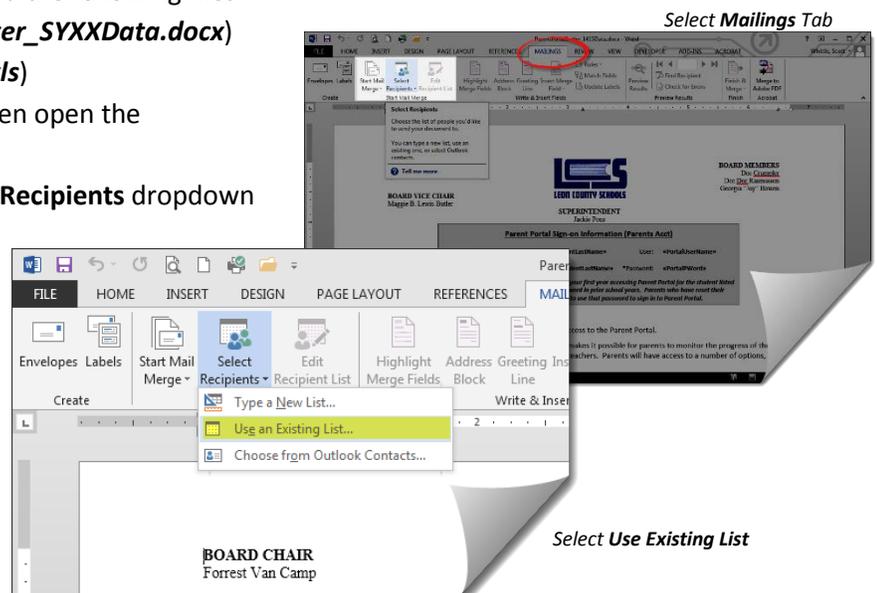
1. The account credentials listed on the Parent Portal Letter are the parent credentials and password found in Genesis under the **FAM** section (these are **NOT STUDENT** accts, but **PARENT** acct info). Student acct information is different and can be found under the **DEM** section on the **Local/DOE-2** tab (See instructions above).
2. Parents **ARE** allowed to change their passwords, students **ARE NOT** (passwords changed by parents are NOT able to be seen in Genesis, only their original assigned PW. If they have changed the password and forgotten it, they can contact the Helpdesk)
3. Parents should be made aware of the following items
 - a. If a parent needs assistance with the Parent Portal and it is **NOT** related to attendance or grades, they should contact - PortalHelp@leonschools.net. or 487-7524 (Helpdesk)
 - b. <http://www.leonschools.net/site/handlers/filedownload.ashx?moduleinstanceid=253&dataid=47&FileName=PinpointParentGuide.pdf>
 - i. Shows them how to setup their profile to **self-service password resets**
 - ii. Shows them how to set their e-mail subscriptions (if available for their school site)
 - c. http://www.leonschools.net/site/handlers/filedownload.ashx?moduleinstanceid=253&dataid=46&FileName=ParentPortal_iPhoneInstructions.pdf (for our iPhone users as the login procedures are different)

School Related info:

1. At the bottom right of the sheet, the letters are organized by
 - a. HR teacher - by Alpha
then within HR by
 - b. Student - Last name Alpha
2. To print specific teachers letters, simply identify the HR teachers page ranges and print them.

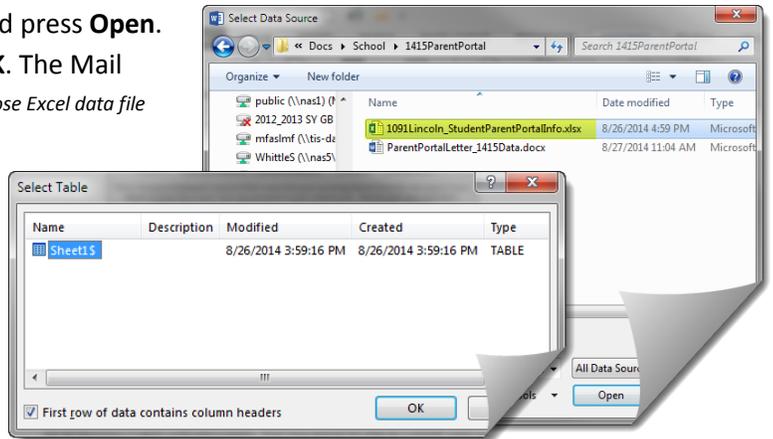
Running a Mass Mail Merge on your Parent Portal letters

1. To run a mass mail merge for the entire school, locate your Parent Portal letter on your DAFS server on the network * The DAFS servers follow the following format from the Run box: ([\\schoolinitials-dafs](#) Ex. [\\dtes-dafs](#))
2. Inside the Docs → School folder, you will find the following files:
 - a. Letter Template - (**ParentPortalLetter_SYXXData.docx**)
 - b. Data file (**StudenParentPortalInfo.xls**)
3. Copy both files to your local desktop and then open the **ParentPortalLetter_1415Data.docx**
4. Select the **Mailings** tab and then the **Select Recipients** dropdown
5. Select **Use an Existing List**

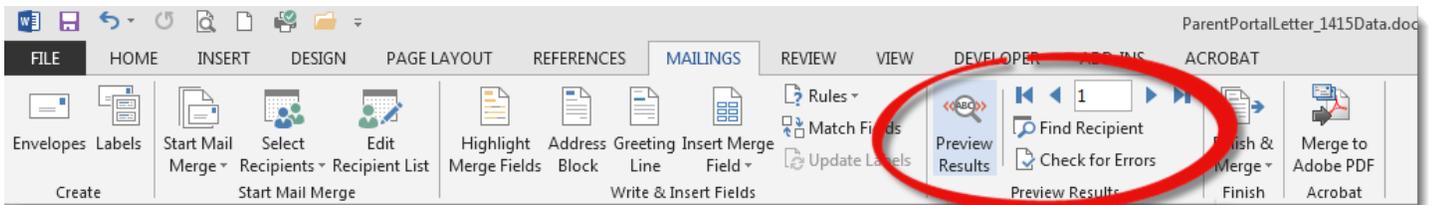


6. Point to the StudentParentPortalInfo.xls file and press **Open**.
7. The Select Table dialog box will open. Press **OK**. The Mail Merge will be complete.

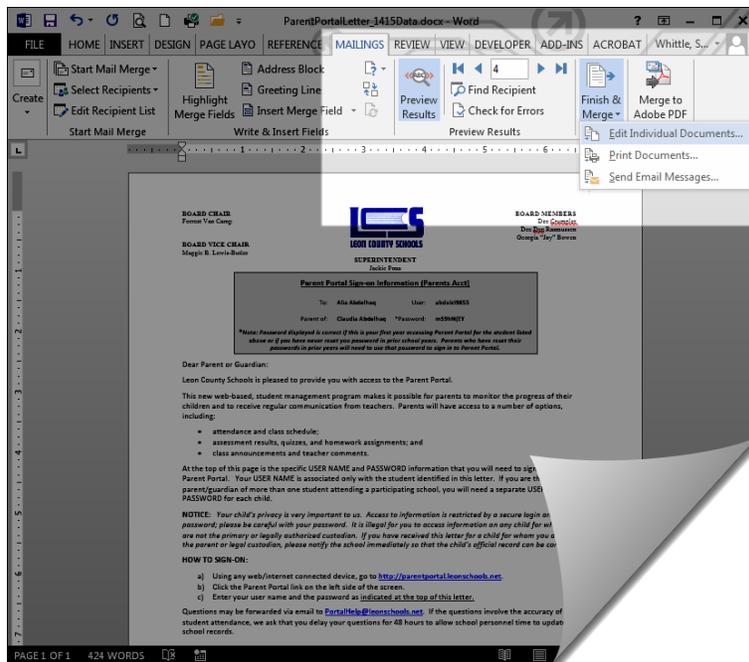
Choose Excel data file



8. To review the letters, press **Preview Results**.
9. To Prepare the letters for Printing/Saving you have three (3) options:



- a. Edit Individual Documents (*creates a single Word file with all letters merged in it*)
- b. Print Documents (*sends letters direct to Printer – not recommended in case of printer error*)
- c. Merge to Adobe PDF (*creates and saves a PDF of the file that can then be printed*)

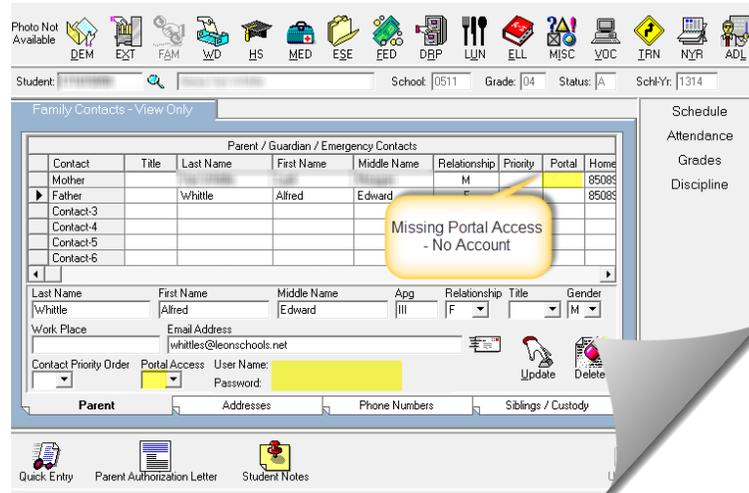


Missing Parent Portal letters

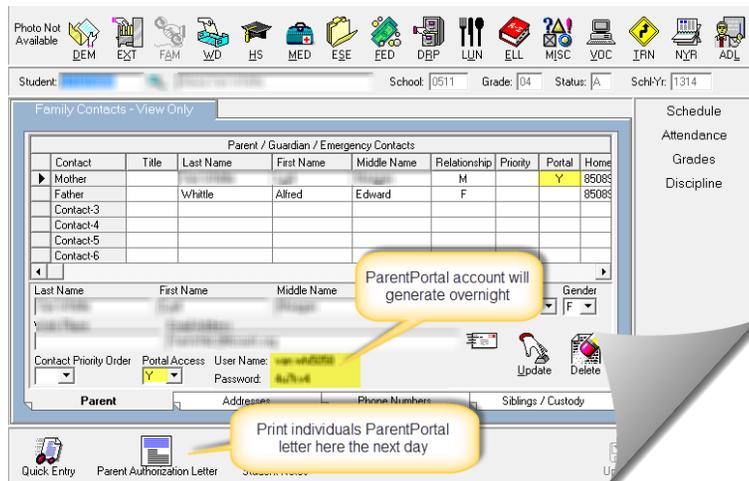
1. There will be some students who are missing Parent Portal letters. This is due to the following:
 - a. Students enter school after **08/26/14** (*last Parent Portal letter account extract date*)
 - b. If portal access was **NOT** set to a **"Y"** in Genesis (*under the Family Dem contacts list*) prior to the extract, then they were not included as they did not currently have an account (*there will always be some students missing due to incomplete Genesis records*)

To resolve this,

- i. Administration or the Registrar will need to identify the appropriate custodial person for that student and **set that person's Portal Access to "Y"**



- i. This is what it will look like after acct has been created overnight. At this point, the school will need to print their individual Parent Authorization Letters by clicking the icon on the bottom of that screen



2. If there is more than one person needing access beyond just the primary contact (*Divorced parents, shared custodial rights, Guardian ad Litem, etc*), the school will have to generate an account for each user that needs access by following the same steps above for each of those contacts.