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Parent Portal – How to Update Profile

The Parent Portal has a feature called Update Profile that when activated (turned on) will “require” portal users to confirm/update all of their member/contact information stored in the Member Tracking System (based on settings). Read further for more about how this feature works when it is activated (turned on).

How it works

When a portal user successfully signs into his/her account, the Parent Portal inspects each person associated to that account one at a time. If a person has not been updated (based on the Update Profile configuration settings) then the account is put into an “update” mode that prevents access to the enrollment page. In simple terms... they can still pay already existing charges, but they cannot newly enroll or re-enroll in any services offered on the Parent Portal UNTIL all member/contact information is confirmed/updated. The update profile process cycles through each person that must be “updated” one at a time by walking the portal user through “steps” for each person that will display that person’s information to confirm or change. Each person will be updated in Member Tracking ONLY if the portal user completes the final step for that person. Once all persons have been “updated” the account will be taken out of “update” mode, and the portal user will now have access to newly enroll or re-enroll into services again.

The Settings (located here: PPC TOOL >> General Settings >> User Profile Update Settings)

General Settings

Portal Activation | Membership Type | Login Page | **User Profile Update Settings** | Terms and Conditions | Email Server Settings

Require a User to Update/Verify their Profile every months

Require a User to Update/Verify their Profile if it has not been checked since

Activate User Profile Update policy on Web

Portal accounts can be set to update information every “set number” of months and/or based on a “deadline” date. Let’s look at some examples using the member Johnny. (Please note that the system will still do the same thing if Johnny is a contact and not a member.)

Deadline Date Example

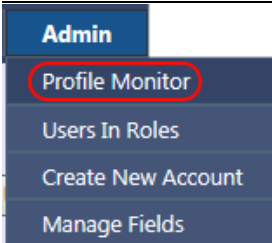
If the member Johnny was last updated (or initially added to the database via the portal) on 7/8/2018 and the deadline date is set to 8/15/2018 then the system will see that Johnny was last updated BEFORE the deadline date, and the account WILL be put into “update” mode to require that his information be confirmed. On the other hand if Johnny was last updated (or initially added to the database via the portal) on 10/1/2018 then the system will see that Johnny was last updated AFTER the deadline date, and no action will be taken (the account WILL NOT be put into “update” mode).

“Set Number” of Months Example

In this example we will set the number of months to 12.

If the member Johnny was last updated (or initially added to the database via the portal) on 10/01/2017 and today’s date is 10/10/2018 then the system will see that Johnny was last updated **GREATER THAN 12 months ago**, and the account **WILL** be put into “update” mode to require that his information be confirmed. On the other hand if Johnny was last updated (or initially added to the database via the portal) on let’s say 8/1/2018 then the system will see that Johnny was last updated **LESS THAN 12months ago**, and no action will be taken (the account **WILL NOT** be put into “update” mode).

Portal Profile Monitor (located in the Parent Portal Admin)



The list of portal accounts currently in “update” mode can be seen on the Profile Monitor page in the Admin section of the Parent Portal. This page will display where a portal user is “at” in the sequential order of the “update profile” process. The persons highlighted in green are already “updated”, but the ones in red still need to be updated. Please note that the person in the gray outline is the person that portal user will confirm/update next. In other words, the person in the gray box is the person currently in the “que” (meaning that is the person the portal user is currently being required to update”).

A screenshot of the Profile Monitor page. At the top, there is a navigation bar with 'Pay', 'Update Profile', 'Admin', 'Faq', and 'Contact Us'. Below this is a breadcrumb trail: 'Home > Admin > Profile Monitor'. The main heading is 'PROFILE MONITOR' with a refresh icon to its right. Below the heading, it says 'Data Checked: 11/27/2018 2:58:50 PM'. The page is divided into three main sections: 'Accounts in update role', 'Account Contacts - Last Updated', and 'Account Members - Last Updated'.

Accounts in update role	Total: 1	Account Contacts - Last Updated	Account Members - Last Updated
terryl@visioncps.com Last Login Date: 11/27/2018 2:55:00 PM release		Incognito, Monique J (portal user) 6/19/2017 Dommer, Nicole 8/7/2018 Incognito, Monique 10/3/2018	Simmons, Alice 11/15/2018 Simmons, James 10/23/2018 Simmons, Mikey never T Simmons, Paulie 8/7/2018 Simmons, Sammy 10/3/2018
Data Checked: 11/27/2018 2:58:50 PM		Update Deadline: 8/15/2018	Update every (# months): 12