



Parent Primer



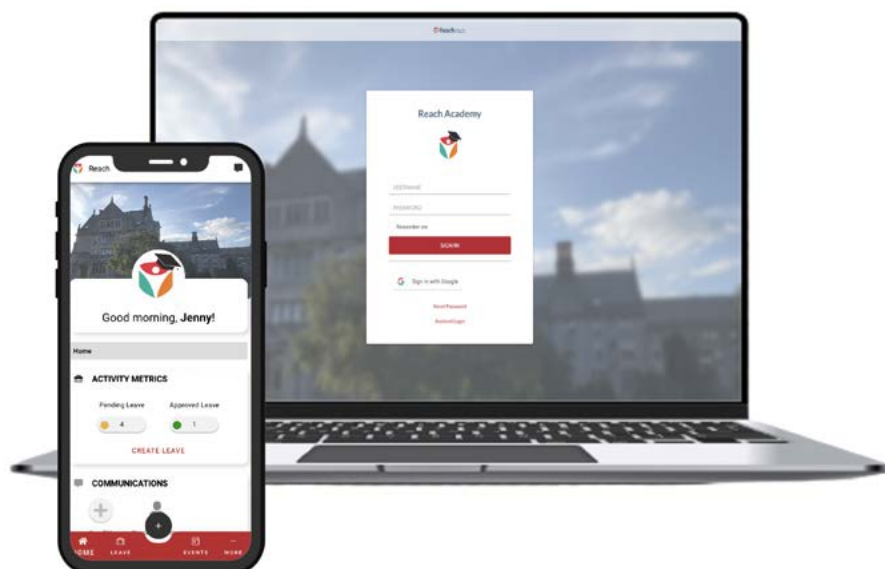
ARTICLE: Reach Parent Primer

Welcome to Reach Student Life Management

The Reach platform is a student management system that is designed specifically for boarding schools. It helps your school to manage an extensive range of residential activities including leave, rollcalls, student records, pastoral care, and reporting.

Access 24/7 from Web Browser or Mobile App

Reach is cloud-based and can be accessed from any device with an internet connection, using either a web browser or via the mobile app, which is available for Apple and Android devices through their online stores.



NOTE: Not all schools will issue parent login accounts for parents to access Reach. Some schools will only require parent interaction with Reach via email authorization for Leave Requests for their child(ren).

Via The Reach Web Portal

How to Access Reach

Once you have registered at your new school, the staff will create a personal profile for you in the Reach portal, then connect (associate) you to your child and the student profiles to which you will become an authorized host. Then, with your new username and password, open a web browser and enter your school's specific Reach portal web address and sign in with your assigned credentials.

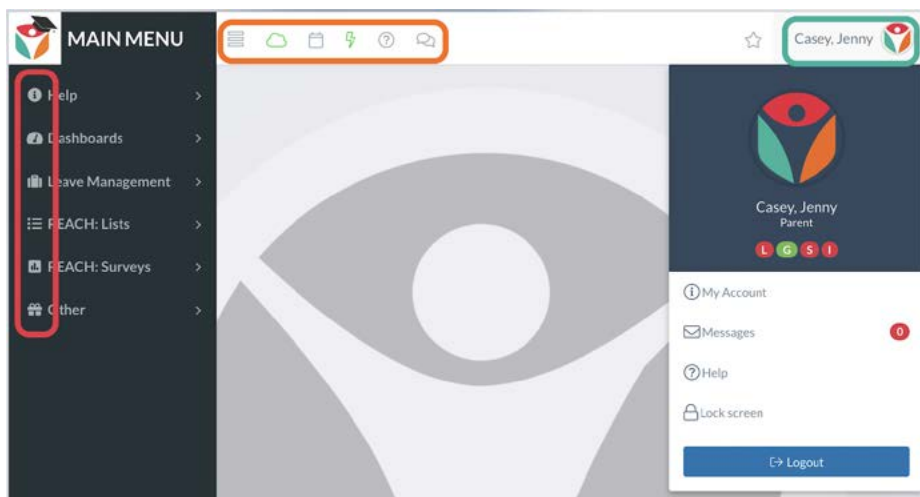
NOTES:

- By default, your username will be your email address. If you do not have your email address registered, then your username will be FirstnameLastname (note the capital letters). These details should be provided to you by the school after they create your personal profile.
- If your identity cannot be authenticated, then you will be presented with an error message. Please retry your credentials and click Sign-In.
- If you continue to get an error message then your credentials are most likely different from what you have been advised.
 - Please contact your school and they can reset your credentials for you.
- The Reach portal login is case sensitive to upper and lower case text, so be aware during login.
- Once you have logged in, you can manage your details/settings via the My Account section.
- Click on the area of your name/Reach logo/profile photo in the top right corner, then click Account, update/change details as required, then click Save.

Reach Web Software Basics

How to Navigate in Reach

The navigation sections of the Reach Portal screen are; **Main Menu**, **Header Bar**, and **My Account**. The available functions and features will differ with permission settings and extension modules specific to your school.



Main Menu

The icons on the left-hand side of the screen, are the Main Menu, this list provides you with quick access to the software functions. Click an icon to reveal the mini menu within each function.

Header Bar

The icons across the top of the screen are indicators of functions or quick links to your available features.

- **Three Lines Menu** - Click this to expand or collapse the Main Menu, to show icons only, or icons plus titles
- **Cloud** - Glowing green indicates you are currently online
- **Bell** - Click this to open the Notifications Mailbox, the Bell will change color to notify of incoming messages
- **Calendar** - Click this to open the Calendar tab
- **Lightning Bolt** - This is Pulse, and it indicates the Reach portal is actively connected to the main server for fast updates

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- **Question Mark** - Click this to open the Reach support website in a new browser window - support.reach.cloud
- **Chat Bubbles** - Click this to open the Reach-Now Communications module

My Account

In the right-hand corner of your Reach screen, you will see your name and your profile image. The Reach Logo will appear if no image has been loaded. Click this area to open the drop-down menu, the menu options are; **My Account**, **Messages**, **Help**, and **Lock Screen**.

- **My Account** - this will open in a new tab, here you can update/change the details of the following sections; Personal, Address, Security, and Theme (any updates/changes made require you to click save before closing My Account tab)
- **Messages** - this will open the My Mailbox tab, this is the same as clicking the bell icon from the top menu bar
- **Help** - this will open in a new tab, this is support.reach.cloud, a Reach software information portal
- **Lock Screen** - this will lock the Reach portal browser window, to unlock, your personal Reach PIN is required (PIN can be set in My Account)

How to use the Home Dashboard

Once you have logged in, the sections that you are presented with are for easy viewing and quick access to the main functions. The page tabs (currently showing **Calendar & Home**) allow you to work on many things at once. Each item that you are working on will open as a new tab across the top of your dashboard screen. When using Reach you can easily switch between these tabs at any time, without losing any data on other pages, a tab will glow orange to alert you to unsaved changes on that page.

The **Home Tab** standard features are; **Events**, **Current Leave**, and **Historic Leave**.

Depending on your school's active permissions per user and extension modules, more options may appear, for example; Lists & Surveys.

The screenshot displays the Reach Home Dashboard for a user named Casey, Jenny. The dashboard is divided into three main sections:

- Events:** A list of events for student Ellison, Steven. It is split into 'Already signed up' and 'Available for sign-up'.

Event Name	Date/Time	Status	Action
Football R7 Dogs v Cats	14/04/2020 01:00	In progress	View
Movie - Gold Class - The Addams Family	20/04/2020 18:30	Open for sign-up	View
Surf Bus - SLSC Members and Board Raters	16/08/2020 07:00	Open for sign-up	View
Mind Immersions Exhibition	17/11/2020 18:00	Open for sign-up	View
City Shopping trip	28/11/2020 11:30	Open for sign-up	View
Dance Showcase	07/05/2021 18:30	Open for sign-up	View
Easter Egg Hunt	20/04/2020 16:30	Open for sign-up	View
Football Game Round 5 - Cats v Dogs	13/06/2020 17:00	Open for sign-up	View
- Current leave requests:** A table showing active leave requests.

State	Actors	Properties	Leave Type	Boarder	Leave Date	Return Date	Host Name	Destination
Appr...	Casey, Nicki	Day Leave	Casey, Nicki	08/20/2021 10:00 AM	08/20/2021 05:00 PM	Casey, Jenny	Library	
- Historic leave requests:** A table showing past leave requests.

State	Actors	Properties	Leave Type	Boarder	Leave Date	Return Date	Host Name	Destination
Appr...	Casey, Nicki	Day Leave	Casey, Nicki	06/07/2021 08:00 AM	06/07/2021 07:00 PM	Ad Hoc Host - Details in Notes	Julie's house	
Appr...	Casey, Nicki	Unknown Leave Type	Casey, Nicki	06/12/2021 11:00 AM	06/13/2021 11:00 AM	Ad Hoc Host - Details in Notes	Tournament	
Appr...	Casey, Nicki	Unknown Leave Type	Casey, Nicki	06/17/2021 11:30 AM	06/17/2021 12:30 PM	Ad Hoc Host - Details in Notes	Target	
Appr...	Casey, Nicki	Special Leave	Casey, Nicki	06/28/2021 03:05 PM	06/29/2021 02:05 PM	Casey, Jenny	Home	

If your school is using the Events Manager module and it is enabled, you will see the Events table in your Home view. This section of the dashboard is split into two parts; the events your child(ren) has 'Already Signed-Up' for and the Events that are 'Available for Sign-Up'. Events are created and managed by your school, the events listed in your login are specific to your child(ren).

Click this link to view a quick video tutorial: [Events Overview](#)

- **Student Selector** will only appear when you are a parent to more than one student
- **Already Signed-Up** displays a list of events that your child has already been registered for. If you click the 'View' button, a pop-up will provide details of that event and its current status as, WaitListed or Attending. The action buttons provided are 'Unregister' and 'Cancel'.
- **Available for Sign-Up** displays a list of events that are available for your student to register for. If you click the 'View' button, a pop-up will provide details of that event and the action buttons provided are 'Register', 'Decline', and 'Cancel'.

Current Leave Request

This section shows any upcoming leave events that may require action by you or staff. For extended details about 'How to Create Leave Requests', please reference "How to Create a New Leave Request" below in this document.

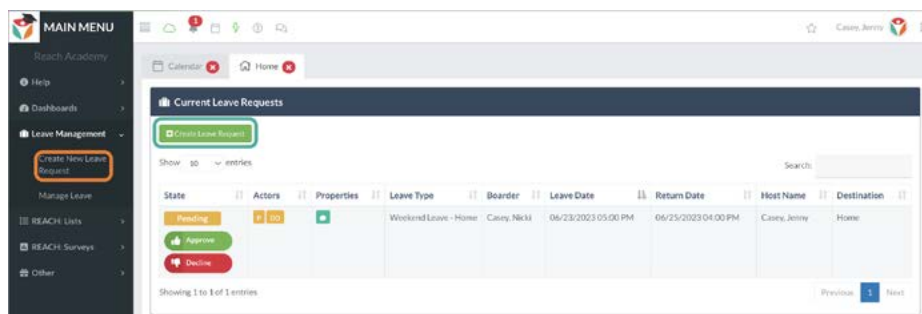
Historic Leave Request

This section provides a history of leave items. Click any historic event to view the details of that event.

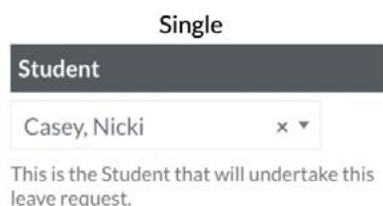
Leave Via the Web Portal

How to Create a New Leave Request


To create a leave request, click the green **Create Leave Request** button on the Home tab of your dashboard, or click the suitcase icon in the left-side main menu and select **Create Leave Request**, each option will open the Leave Details screen.



If you only have one student registered to you, by default, their name will appear in the 'Student' section. If you have multiple students registered, the multi-selector icon will appear to select the required students. To create a bulk leave request for more than one of your students select the person multi-select icon.



Then, continue to follow the prompts to enter your required details. The majority of the fields are drop-down menus and they will guide you towards your appropriate selections. When complete and ready to submit select the save button at the top of the form.

 **NOTE** : When a student logs into Reach with their login, they only have access to create leave requests for themselves, to then be approved by the required level of approval actors.

The example form below has been outlined to better explain the functions within the Leave Details form. The fields outlined in **green** are all drop-down selector menus. Simply select the relevant field for your request. The fields outlined in **red** are for free text fields input, add details or notes as required.

Leave Types and **Method of Transport** lists are created and managed by your school.

Host drop-down menu will only show the pre-approved parents, guardians, and hosts. The hosts that your child can go on leave with are authorized by you as parents and connected (associated) to the profile of that student by the staff at your school.

If the host that you want to select for a leave event is not displayed in the list it is likely that either;

- (1) the host has not been created in the Reach system, or
- (2) they have not been connected (associated) via the personal profile of that student as an approved host

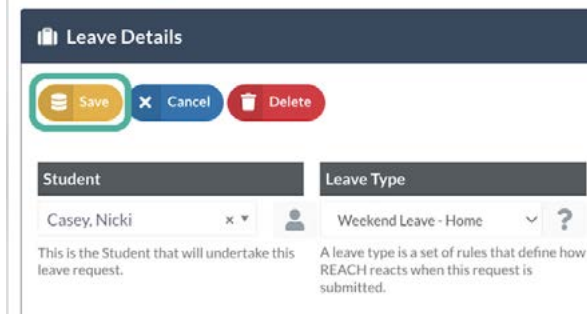
Destination field is required and in some instances (when set by the school) the **General Notes** section may also be compulsory.

Depending on the leave type configurations set by the school, there may be additional drop down options available to select in the submission of a leave request; **Recursion**, **Late Meal**, or **Packed Meal**.

Once you have chosen this item, the Recursion Pattern field will open.

- Select the type of pattern - every week or every 2nd, 3rd, 4th week
- Select the days of the week for the recurring event
- Select the **For** drop-down menu, to select between - Until Date or X Times
 - Until Date - provides a calendar, once clicked you can select a completion date
 - X Times - provides a field to enter the number of times you would like the event to occur
- Recurring events only require approval once by parents and staff, then each event will be available as the time/date occurs

Once you have entered the required details, click the save button. The leave details screen will then close. Newly created leave requests will appear in the current leave section of your dashboard, shown as **pending**.



NOTE: Not all requests generated will remain pending. as some may auto-approve based on the school's configuration settings.

Depending on the settings set by your school, you may also receive an automatic email regarding this new leave request. On the dashboard, you are now presented with **approve & reject** buttons for your action. Depending on the type of leave created and the number of approvals required, (eg; parent/staff approval), this may stay **pending**, until all approval levels have been successfully completed. Reach automatically contacts all parties that are required to approve the leave request, including staff/faculty. When all approvals are complete, Reach will automatically send a confirmation notification to all parties involved including; students, parents, and hosts.

Here is an example of a leave request in a **pending state**, with approve & reject buttons. Another showing as **approved**.

State	Actors	Properties	Leave Type	Sounder	Leave Date	Return Date	Host Name	Destination
Pending	[Icons]	[Icons]	Overnight Leave	Pulker, Michael	17/09/2021 12:00 PM	18/09/2021 12:00 PM	Pulker, Michael	Home visit
Approved	[Icons]	[Icons]	Rec Event (School)	Ellison, Bronen	21/09/2021 07:00 AM	21/09/2021 05:00 PM	AJ Hos Host - Details in Notes	Bakerbell Academy Training

How to Edit a Leave Request

If you need to edit a leave request, you can select the specific leave from the **current leave** screen, adjust the details as required. You can change any aspect of this leave item, and remember to click the Save button when complete. You can only edit a leave request if it is still pending, approved or rejected.

Changes to the details of any leave request will generate new leave request approval notifications to all relevant parties involved in the procedure. This is a security measure that ensures that adjustments can not be made without notification to all relevant parties. This procedure also ensures that the school has the correct facts/details of a leave event approved by the parent.

📄 NOTE: The ability to make edits is set by your school's user accessibility setting and may not be accessible for everyone.

How to Approve/Decline a Leave Request

To Approve/**Decline** a leave request that may be created by your child(ren) or staff, these notification methods are controlled by your school. This may be an SMS notification or via email, please contact your school to confirm their required procedures.

Further details are available via this support article link: [Approve / Decline Leave Requests as a Parent / Host](#)

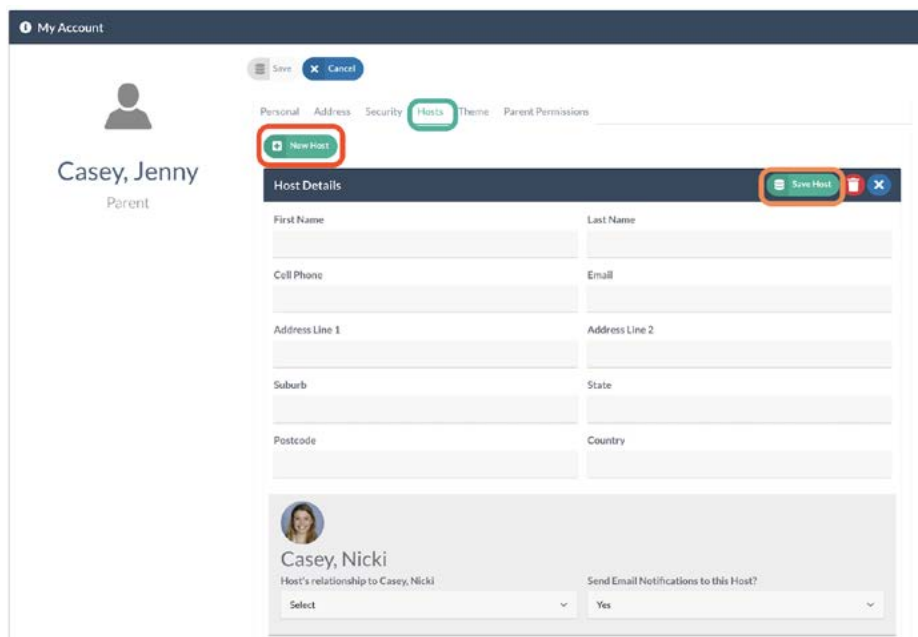
📄 NOTE: your required approval methods will all depend on your school's expectations of parental use within the Reach system. Some schools only have parents approve leave requests through Email. Some schools will have parents log into their own Reach parent account using Push notifications, and some schools will use SMS (text messages). Any questions about which specific method you, as a parent, should expect to use to approve a student/s leave request should be directed to your school.

How to Add Hosts for your Child(ren)

There are two ways to add approved hosts to your child(ren)'s profile:

One - My Account Host Creation

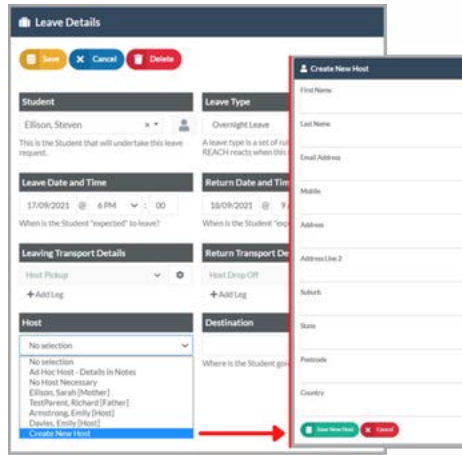
Open the My Account section of your Reach portal and select the Hosts tab. Here you can add new hosts that can be associated with one or more students.



The screenshot shows the 'My Account' page with the 'Hosts' tab selected. A 'New Host' button is highlighted with a red box. Below it, the 'Host Details' form is visible, with the 'Save Host' button highlighted with a red box. The form includes fields for First Name, Last Name, Cell Phone, Email, Address Line 1, Address Line 2, Suburb, State, Postcode, and Country. At the bottom, there is a section for 'Casey, Nicki' with a dropdown for 'Host's relationship to Casey, Nicki' and a checkbox for 'Send Email Notifications to this Host?'.

Two - Quick Host Creation

This option is available in the leave details screen of a new leave request, by using the host selector. Select create new host to open the details panel. A new host created in this way will be used for the current leave request and associated with the student for selection in the future.



NOTE: The ability to create a new host within a leave request form is a setting that is configured by your school. It is possible that your school does not have this ability enabled for parents. If this is the case, please contact your school directly with any specific questions about their procedure for adding new hosts for your student/s.

VIA The Reach Mobile App

The Reach app is designed for use as a transaction platform, it is free and available for use by all parents that have an account on your school's Reach portal. The app provides access to the major transaction elements for parental users. It is not a complete replication of all functionality available via the Reach web portal. To view detailed explanations of each section of the app, please view the: [Parent Mobile App User Guide](#)

How to Access Reach

Once you have a profile created via the Reach web portal by your school, your login will be set, at this point, you also have access to the mobile app. Download the app, it is free and available to download for Android and Apple devices.

Search for '**Reach Student Life Management**' in either the Google Play Store or iTunes store.

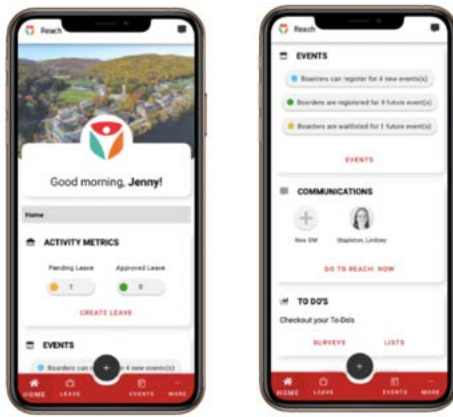
To view more detailed explanations please read the Article: [How to Access & Use the Reach on a Mobile Device](#)

Reach App Software Basics

How to Navigate in the Reach App

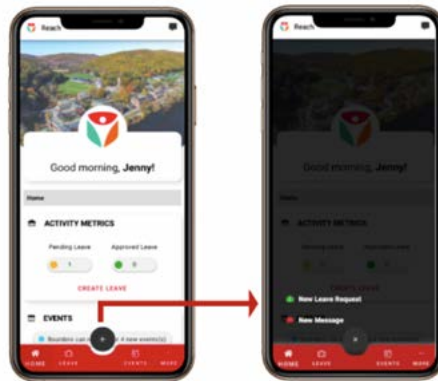
The main menu areas of the app are as follows;

Firstly, the home screen is sectioned into 'cards' for fast access to the main areas of Reach available to you.



Secondly, the red menu bar across the bottom of the app, these buttons are quick links to features.

Thirdly, the central PLUS button at the bottom of the screen, once tapped, will pop up a list of quick access features.



Home Screen / Metrics View

The Home Screen is your base Metrics View and launch point for the main functions of the app. In the top right corner is the Reach Now messaging icon for fast access to the Communications feature. Each section of the home screen is explained in detail via this support guide; [Parent Mobile App User Guide](#)

 **NOTE:** This icon may not appear, as Reach Now is an extension module to Reach and must be enabled by your school.

Leave VIA the Mobile App

Parents are able to submit and edit leave requests within the app.

Activity Metrics

This panel visualizes the total number of Pending and Approved Leave items for your child(ren).

Pending Leave – how many leave requests are awaiting approval from all parties involved, tap to open

Approved Leave – number of fully approved leave items in the system, tap to open

Create Leave button – will take you through a simple page-by-page process to create new leave, tap to open



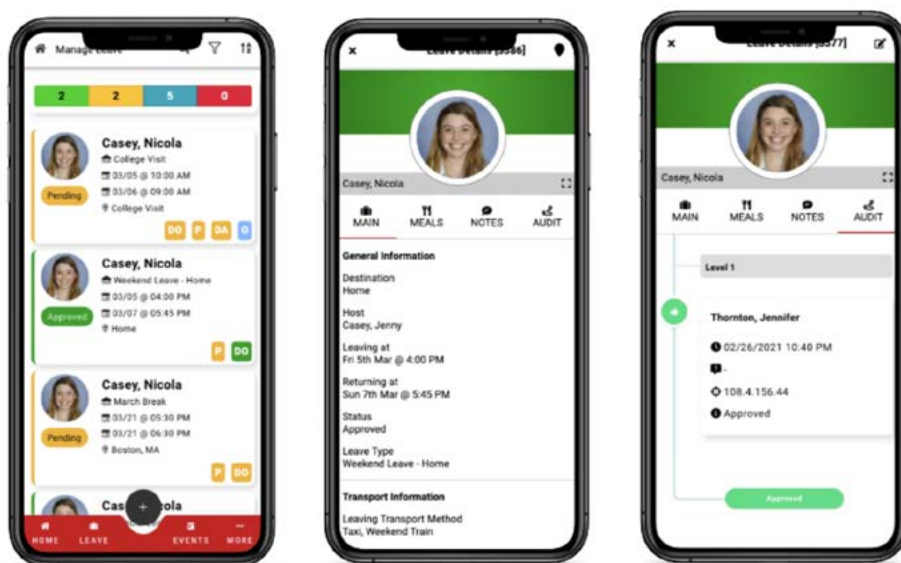
How to View Existing Leave Items

Tap the 'Leave' button from the bottom menu bar to open the manage leave screen, providing an array of filter and sorting options to view current and past leave items.

Quick filtering for **Approved**, **Pending**, **On Leave**, and **Rejected** leave items can be accomplished by selecting one of the 4 corresponding colour rectangles at the top of the page. Along the top right of the screen, you have the ability to search, filter, and sort by additional details.

Clicking on a leave item will display a variety of options to view, including the main details of the leave request, if any special meal accommodations were scheduled due to the leave timing, notes entered regarding the leave, and the complete audit trail of the approval process.

The example images below, from left to right show; the leave items to view, the central image shows the details of a leave item opened, the image on the right shows the details of the audit screen. A red line appears under the currently active tab.

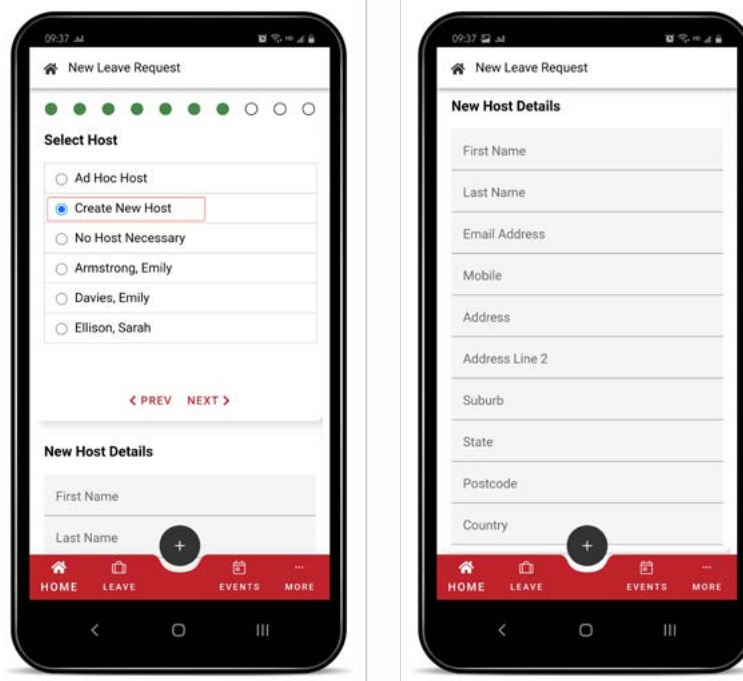


How to Create a New Leave Request

To create new leave, tap the PLUS button at the bottom center of the screen and choose **New Leave Request**. Follow the series of prompted screens to input the required details. Parents have the ability to select multiple legs of transportation for departure and return. For recurring leave, select the frequency and duration. Prior to submitting the leave request, review the details and make any changes if needed.

- When you arrive at the select host page, select the **create new host** menu option
- This will extend the page down to reveal the new host form
- Complete this form and click next
- Continue through each page and complete the request

When this is saved, the new host will then be added to your child's profile, then in the future, you and your child can select that host when creating new leave.



NOTE: The ability to create a new host within a leave request form is configured by your school. It is possible that your school does not have this ability enabled for parents. If this is the case, please contact your school directly with any specific questions about their procedure for adding new hosts for your student/s.

Getting Support

User Guide

Web - Click the Help icon in the main menu and select User Guide, this will open the [Parents Portal](#)

App - Quick Link: [Parent Mobile App User Guide](#)

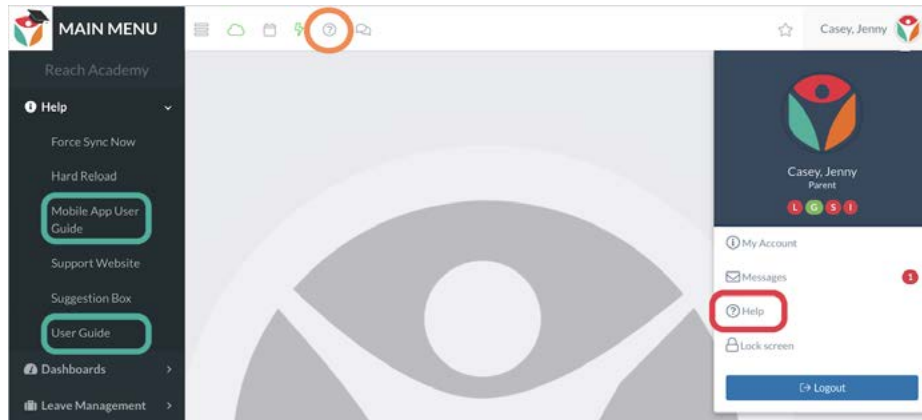
Additional support: [Reach Help Center](#)

Knowledge Base & Help Desk

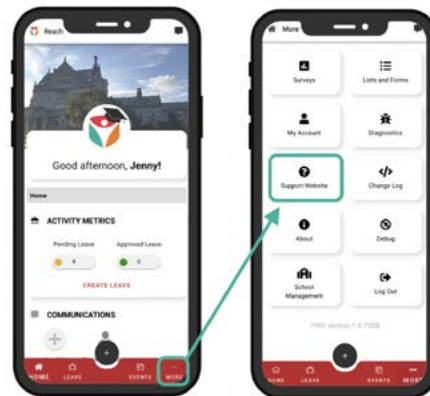
At the top of your Reach web portal, you will find a **question-mark** icon. Clicking this icon will take you to the Reach Help Center, the Knowledge Base support website for Reach users, where you can search for answers, and if need be, create a support ticket for our help desk or participate in the community discussions.

Quick Link: [Reach Help Center](#)

Video Tutorials: [Parent User Support Videos](#)



In the Reach app, you can access the Reach Support Website from the "More" menu button and select "Support Website" to access support.reach.cloud directly in your mobile browser.



Email Contact

- (1) You can contact Reach support directly by sending an email to support@reach.cloud. Please be sure to list the name of the school you're associated with when reaching out to Reach Support.
- (2) Contact your school's Student Life office or their on-campus Reach administrator.

<https://touchlinereach.zohodesk.com/portal/en/kb/articles/article-reach-parent-primer>