Portal User Guide

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1 Getting Started with Portal

Before a project team member can begin to use Portal, he/she will first have to sign up and login in successfully

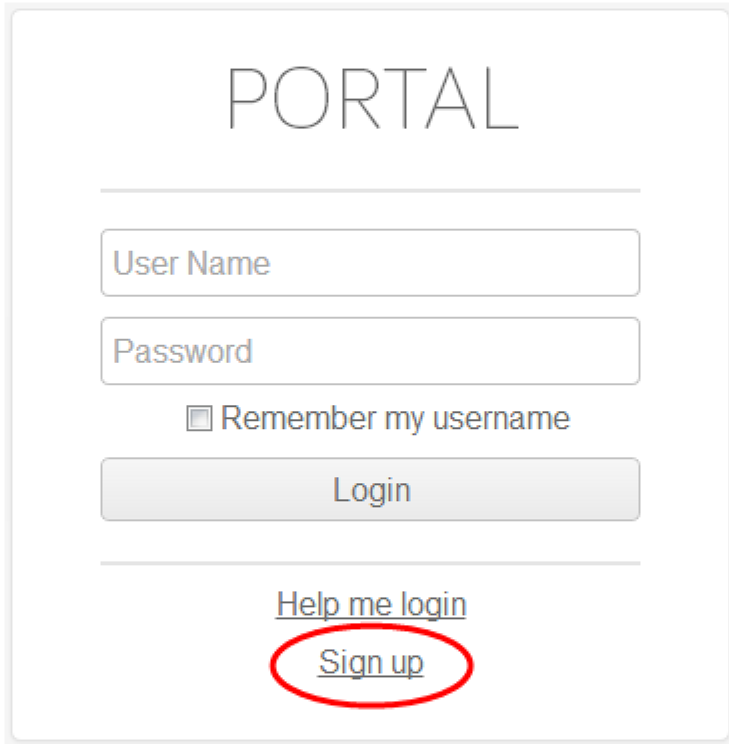
1.1 Internet Browser and Computer Requirements

For security reasons, Portal and all other websites should only be accessed with the Microsoft Edge internet browser.

Portal and other websites should only be accessed on computers with legal licenses for Windows 10 or higher because using the internet on computers with older or illegal versions of Windows is a security risk.

1.2 How to sign up

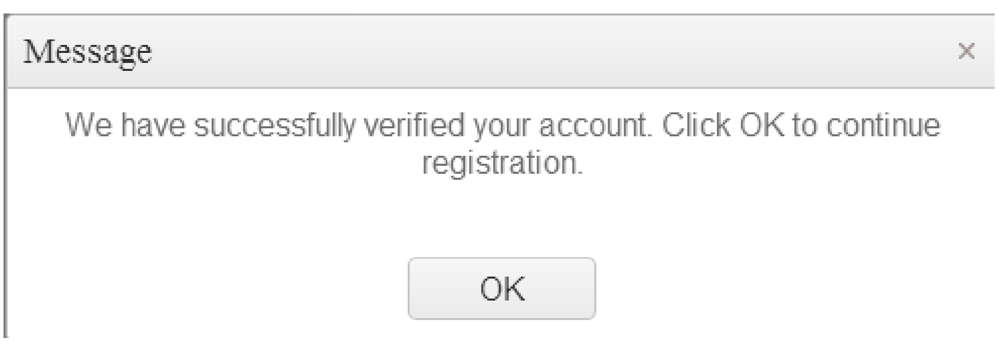
In order to sign up for Portal, you will need an ASC ID number that is assigned in Kansas. Your Project Admin will be able to provide your ASC ID number. Each project has at least one Project Admin who can add or remove access to Portal for other users in that project. After you have your ASC ID, go to the following link and click on the "Sign up" link:
https://portal.unbound.org/



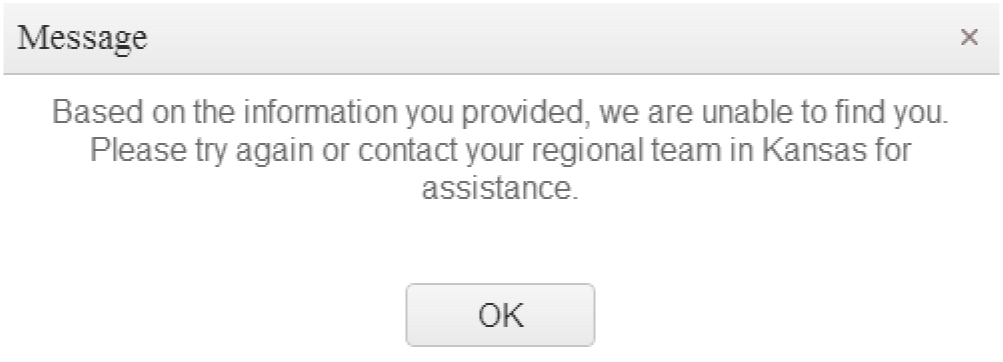
After clicking on the “Sign up” link, you will see a form with three fields. Complete the fields with the following information:

- Enter Associate ID: the ASC ID that your Project Admin will provide you. This field only accepts numbers. It is not necessary to enter “ASC”.
- ASC Full Name: your name as it appears in the Kansas database. Your Project Admin will be able to tell you this.
- Country or Zip Code: the name of the country in which you live, in English.

After you have completed these three fields, click “Submit”. If all the information is correct, you will receive the message below. Click OK to continue.

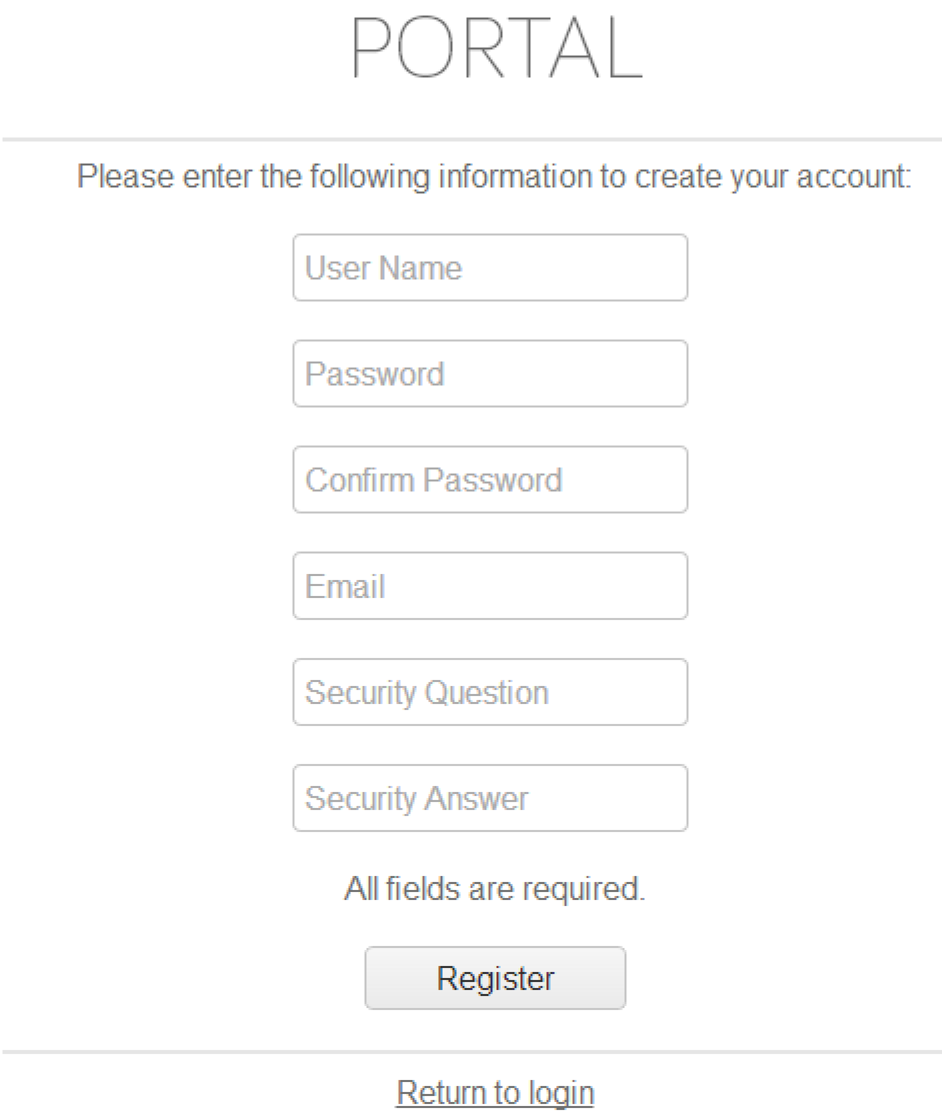


If any of the information entered on the Sign Up form was incorrect, you will receive the message below and should verify with your Project Admin or Kansas Project Specialist that the information you are entering in the Sign Up form is correct.

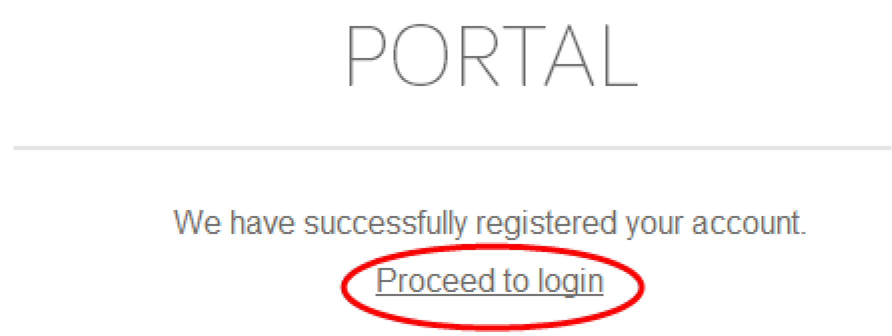


After completing the Sign Up form correctly and clicking, “OK” on the message received, you will see the following form to create your account. Complete the fields below.

- User Name: your Portal user name that you will choose. It may be any user name you like, but if a user name you enter is already in use by another user, you will receive a message stating that the username is already in use, and you must choose another username.
- Password: your Portal password that you will choose. It must have at least 8 characters, one lower-case letter, one upper-case letter, one numeric digit and one special character.
- Confirm password: enter your Portal password again
- Email: enter your work email address. Only valid email formats will be accepted.
- Security Question: a question that only you should be able to answer. It will be used to help you reset your password if you ever forget it.
- Security Answer: the answer to your Security Question.



After completing the registration form, click on "Register". If the information has been filled out correctly, you will receive the message below. Click on "Proceed to login" to login with the username and password you just created. If there is any problem with the information entered in the registration form, please double-check the information and ask your Project Admin or your Kansas Project Specialist for help if needed.

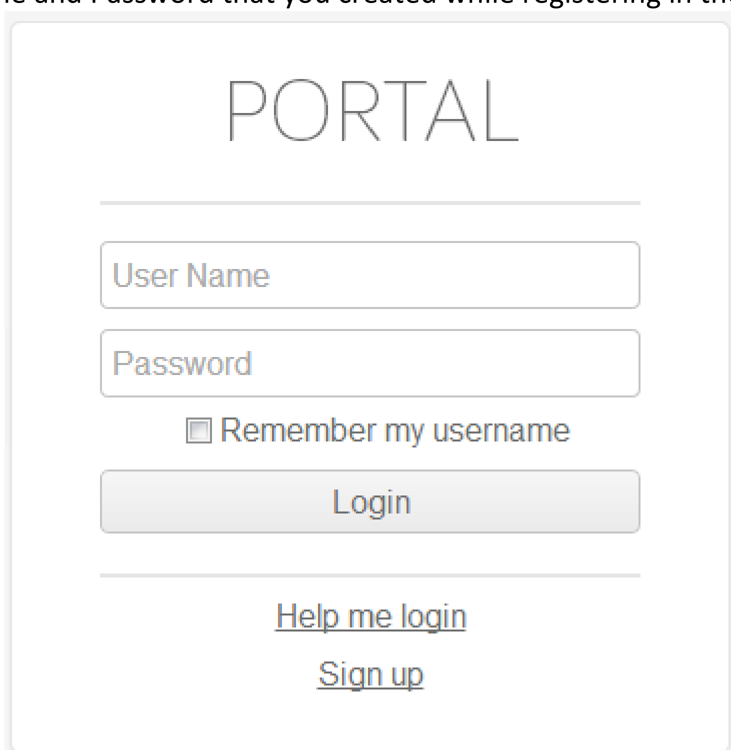


1.3 How to login

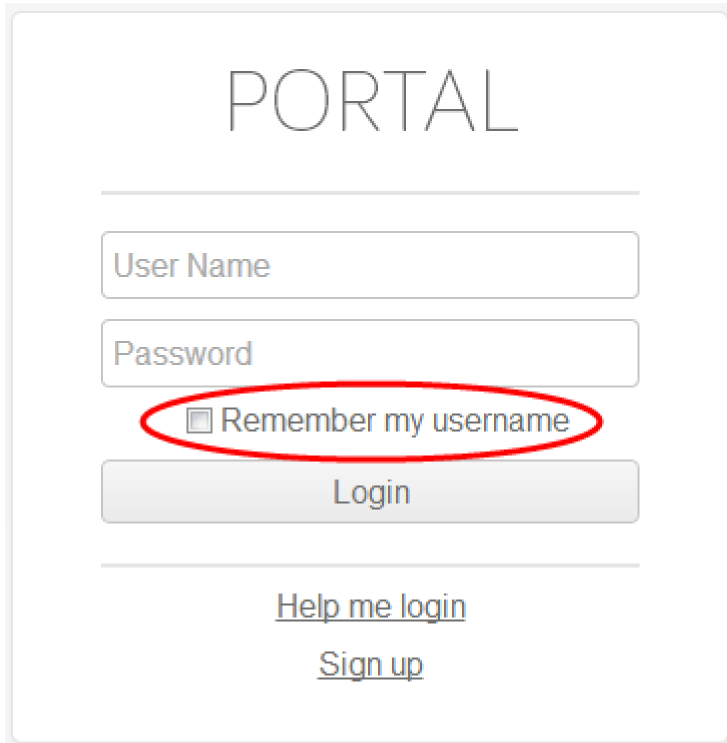
After signing up for Portal, you will be able to login. Go to the following link to login:

https://portal.unbound.org/

Enter your Username and Password that you created while registering in the appropriate fields:

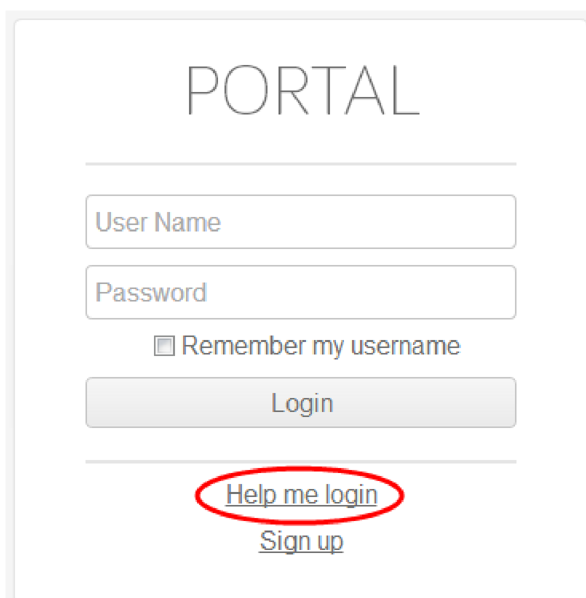


If you would like, you may check the box that says, “Remember my username” so that you do not have to enter your username every time you login to Portal. However, you will still have to enter your password each time you login. Selecting “Remember my username” is not recommendend if you share a computer with another Portal user.



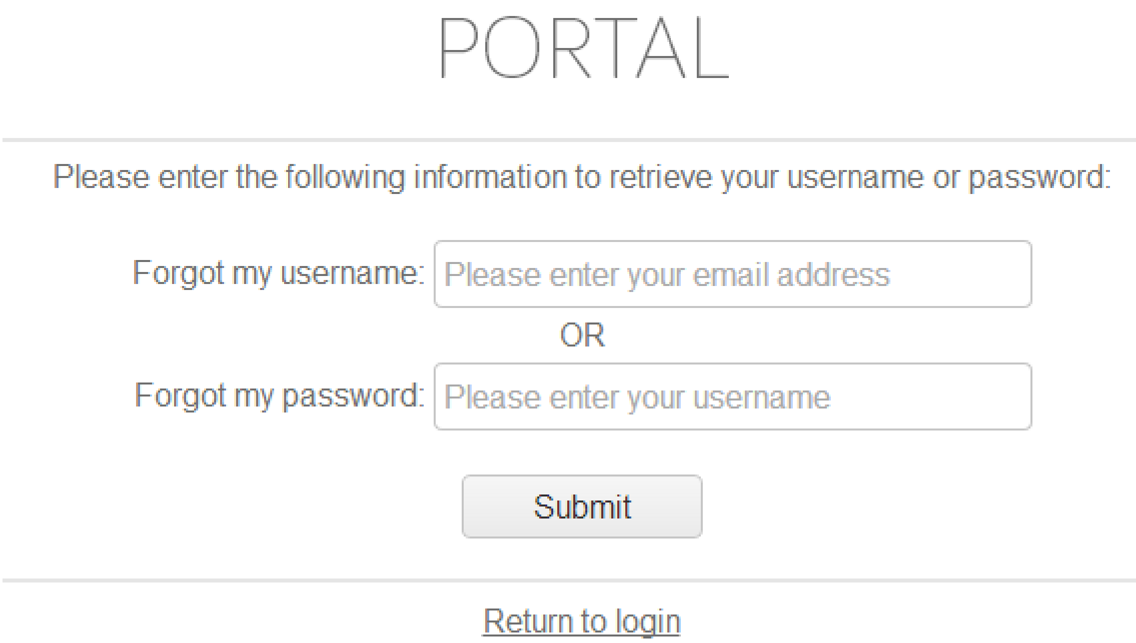
1.4 Help me login

If you have forgotten your Portal username or password, you may click on the link that says "Help me login" to retrieve them:

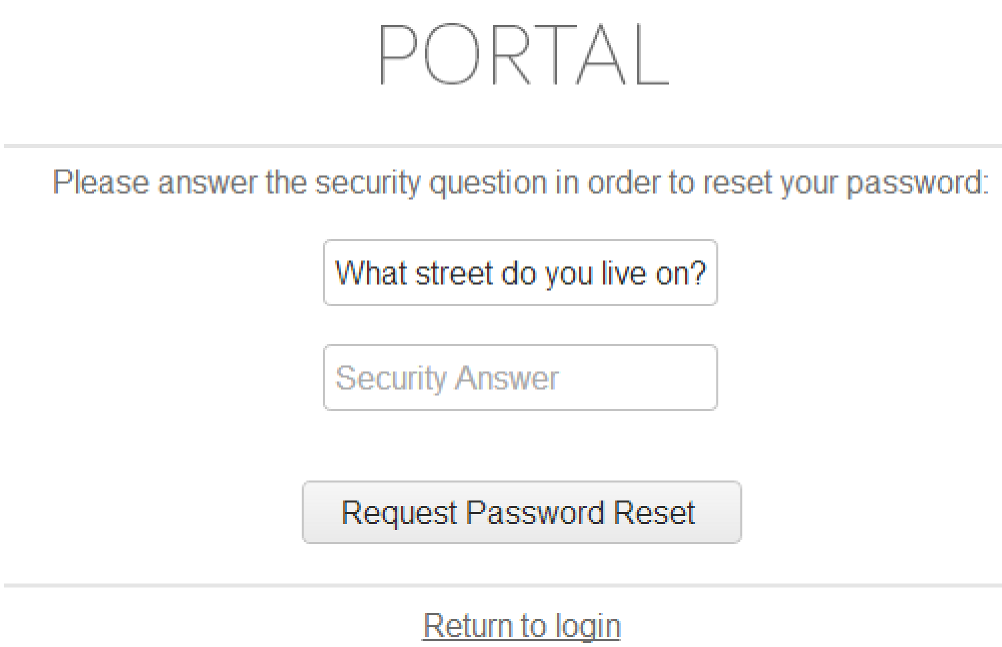


If you do not remember your username, you may enter your email address and click "Submit" to have an email with your username sent to the email address you entered while signing up for

Portal. If you do not remember your password, you may enter your username and click "Submit."



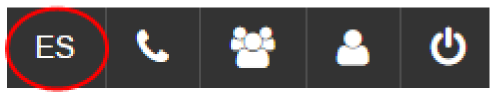
After entering your username, you will then be asked to enter your security question:



If you answer your security question successfully, you will be sent an email with a link to reset your password.

1.5 Portal Language

The default language of Portal is determined by the default language of the Internet browser, Google Chrome. To change the language of Portal to either English or Spanish once you have logged in, click on the either EN (English) or ES (Spanish) button on the Language control in the upper right-hand corner of Portal:



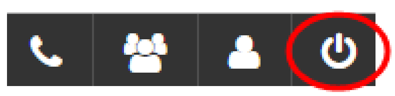
To change the default language of Google Chrome, see the instructions in the Appendix.

1.6 Dates in Portal

All dates in Portal will display in the day/month/year format. For example, 2/5/2014 refers to the 2nd of May, 2014. When exporting reports or search results to Excel, the date format will follow the date format of your computer. To determine or change the date format of your computer, see the Appendix.

1.7 Log Out

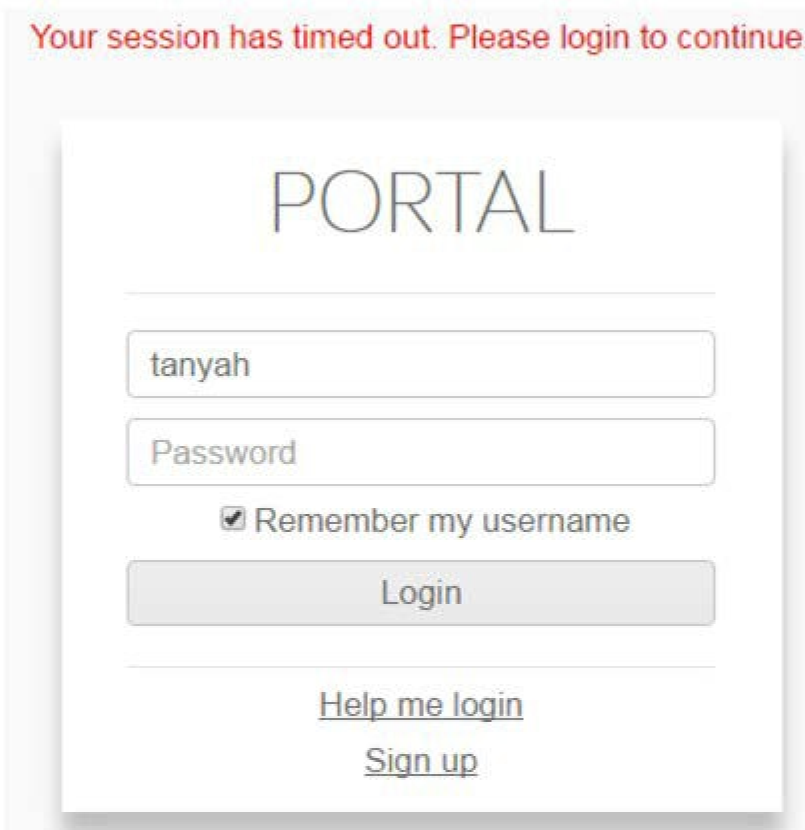
When you are finished working in Portal, you may log out. To do this, click on the “Logout” icon in the upper right-hand corner of Portal:



1.8 Time Out

A user must actively interact with Portal (either click or type) to stay logged in. After 19 minutes of inactivity in Portal, this warning will appear at the top of the screen:

You will then have one minute to click, “Keep me logged in,” which will enable you to continue working in Portal. If you do not click “Keep me logged in,” you will be logged out of the Portal session and will see the screen below. You will need to login again to continue working in Portal:



1.9 Maintenance Period Notification

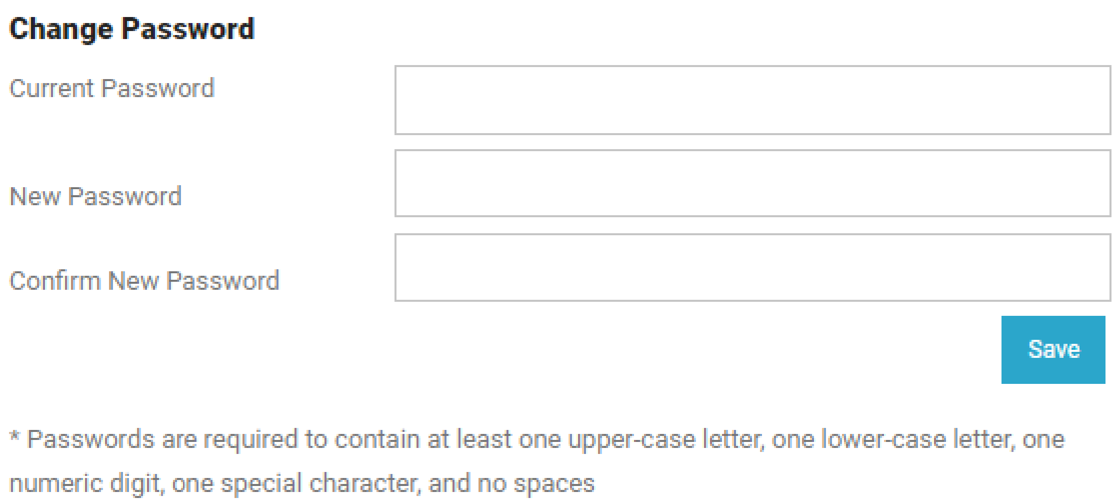
When there is a scheduled maintenance period for Portal, the date and time of the scheduled maintenance will be seen at the bottom of the Portal screen until the maintenance period is complete. Please make sure not to be working in Portal at the time of the maintenance so you do not lose any work. It is possible to close the maintenance notification by clicking on the X icon to its right. It will re-appear if you navigate to a different page, but it can be closed again.

1.10 Password Expiration Notification

The password for each Portal user expires every six months. Beginning two weeks before the expiration date, you will see the following message, and you will see it every time you log in until you change the password (the number of days listed in the message will vary):

To change your Portal password, click on Yes on the message.

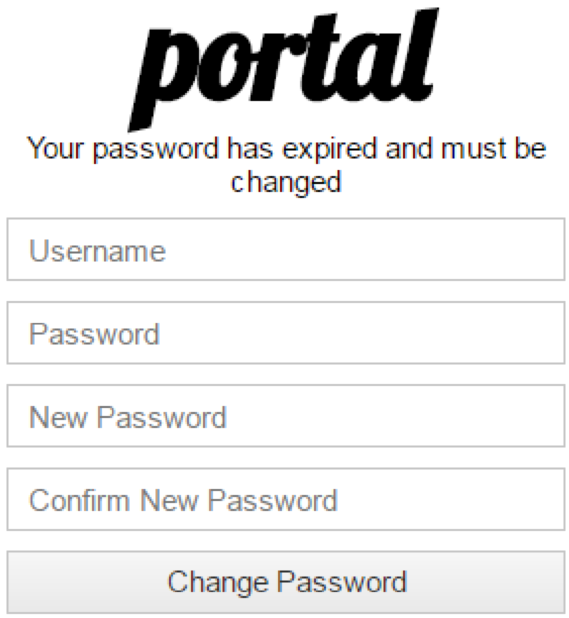
You will then be taken to the “My Account” screen, where you can enter your current password then your new password, confirm the new password, and click Save:



The new password must meet the following requirements:

- New password and confirm password match
- Password is at least 8 characters in length
- At least one lower-case character
- At least one upper-case character
- At least one numeric digit
- At least one special character
- No spaces allowed

If the password is not changed before the expiration date, the next time you try to log into Portal, you will see the following message and will be able to create a new password using the same requirements listed above:

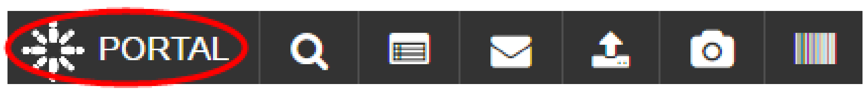


2 Home Page

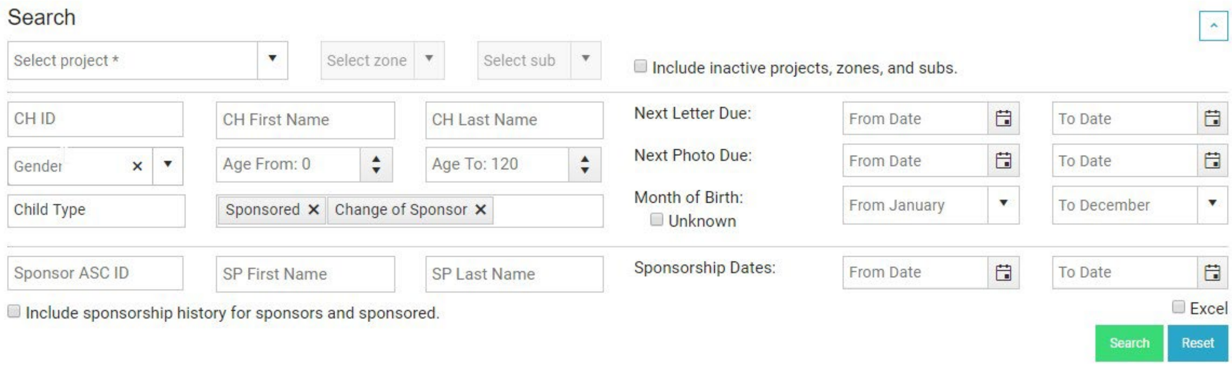
After logging in to Portal successfully, you will see the Portal home page. The home page includes the following content:

- Upcoming Webinar information
- Unbound Manual Set and corresponding forms
- Criss Cross archives
- Materials created and shared by projects
- Webinar recordings

If you navigate to another page within Portal and would like to return to the home page, you may do so by clicking on the Portal link in the upper left-hand corner of the Portal screen:



3 Search Page



3.1 Search features

3.1.1 Search results access

All of the information on the Search page is filtered according to the user's access. For example, a user at the project level will be able to see search results for all sponsored members and sponsors within that project. For those projects that have zones, a user with access to only one zone would only be able to see search results for sponsored members and sponsors within that zone. For a user with access to only one subproject, he/she would only be able to see search results for sponsored members and sponsors within that subproject.

The project will be defaulted in the "Select Project" drop-down menu for all users. If the user only has access to one zone, the zone will be defaulted in the "Select Zone" drop-down menu. Otherwise, to select a subproject, the user will have to either select a zone or "None" in the zone drop-down menu to see search results from only one zone. If the user only has access to one subproject, the subproject will be defaulted in the "Select Subproject" drop-down menu. Otherwise, the user will have to select a subproject to see search results from only one subproject.

3.1.2 Search and Reset buttons

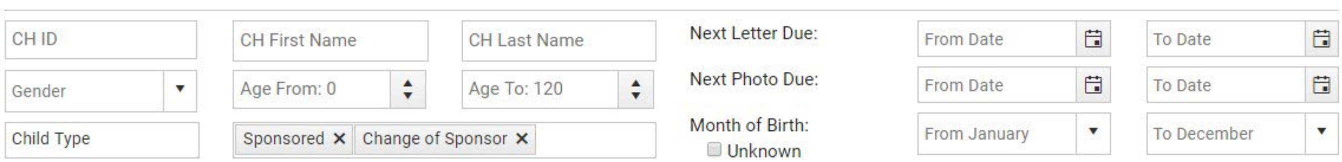
After the desired search filters have been selected, click on the “Search” button to view the search results. To clear the selected search filters and return them to their default values, click the “Reset” button.

3.1.3 Including inactive projects, zones, and subs in search results

The “Include inactive projects, zones, and subs” checkbox may be selected to include inactive projects, zones, and subprojects to which the user had access before they were inactivated in the “Select Project,” “Select Zone,” and “Select Sub” drop-down menus. This may be helpful to see information from subprojects that were closed.

3.1.4 Search fields related to sponsored members

The following search fields related to sponsored members are available:



- CH ID: the ID number assigned to each sponsored member. This field only accepts numbers.
- CH First Name: the first name of the sponsored member, as it appears in the Kansas database. The wildcard character % can be entered in this field to find sponsored members whose names match all or part of the search criteria. For example, to see sponsored members whose names end with “Joy,” “%Joy” can be entered to see sponsored members with the name, “Mary Joy,” “Christine Joy,” etc. To see sponsored members whose names begin with “Ana,” “Ana%” can be entered to see sponsored members with the name, “Analiza,” “Anabela,” etc. To see sponsored members whose names include “angel,” “%angel%” can be entered to see sponsored members with the name, “Evangelina,” “Angelo,” “Maria Angelita,” “Angel,” etc.
- CH Last Name: the last name of the sponsored member, as it appears in the Kansas database. The wildcard character % can be entered in this field.
- Gender: the gender of the sponsored member, either Male or Female
- Child Type: the primary type of the sponsored member, either Child, Aging, or Vocation
- Child Status: the status of the sponsored member, either Available, Change of Sponsor, Sponsored, or Retired. Sponsored and Change of Sponsor are selected by default so that search results for current beneficiaries are returned. To include search results for Available or Retired members, those statuses must be checked. To exclude search results for members who are in Sponsored or Change of Sponsor status, those statuses must be unchecked.

- Next Letter Due: Calendar fields that can be used to enter a date range to see which sponsored members have letters due within that date range. To see sponsored members with letters due from a certain date onwards, enter a date in the “From” field and leave the “To” field blank. To see sponsored members that have letters due before and including a certain date, leave the “From” field blank and enter a date in the “To” field.
- Next Photo Due: Calendar fields that can be used to enter a date range to see which sponsored members have photos due within that date range. To see sponsored members with photos due from a certain date onwards, enter a date in the “From” field and leave the “To” field blank. To see sponsored members that have photos due before and including a certain date, leave the “From” field blank and enter a date in the “To” field.
- Month of Birth: drop-down menus that can be used to enter a specific month or a range of months to view sponsored members with birth dates during that month(s). For example, to view sponsored members with birthdays in January, select “January” in both the “From” and “To” drop-down menus. To see sponsored members with birth dates from January – March, select “January” in the “From” drop-down menu and “March” in the “To” drop-down menu. To see sponsored members that have birth dates from September to the end of the year, select “September” in the “From” menu and leave the “To” menu blank. To see sponsored members with birth dates before and including September, leave the “From” menu blank and enter “September” in the “To” menu. To see sponsored members that do not have a birth day, birth month, or birth year entered in the database, select the “Unknown” checkbox.
- Child Age: “From” and “To” fields that can be used to enter an age or a range of ages of sponsored members. Numerical values from 0 to 120 must be entered. To see sponsored members of a specific age, enter the same age in both the “From” and “To” fields, for example, “5” and “5”. To see sponsored members 5 and older, enter “5” in the “From” field and leave the “To” field blank. To see children “5” and younger, leave the “From” field blank and enter “5” in the “To” field.

3.1.5 Search fields related to sponsors

The following search fields related to sponsors are available:

- Sponsor ASC ID: the ID number assigned to each sponsor. This field only accepts numbers.
- SP First Name: the first name of the sponsor, as it appears in the Kansas database. The wildcard character % can be entered in this field.
- SP Last Name: the last name of the sponsor, as it appears in the Kansas database. The wildcard character % can be entered in this field.

- Sponsorship Dates: calendar fields that can be used to view sponsorships that began during a given date range. To see sponsorships that were began on a specific date, enter the same date in both the "From" and "To" field. For example, enter 1/12/2013 and 1/12/2013 to see sponsorships that began on the 1st of December, 2013. To see sponsorships that began from a certain date onwards, enter a date in the "From" field and leave the "To" field blank. To see sponsorships that began before and including a certain date, leave the "From" field blank and enter a date in the "To" field.

3.1.6 Include sponsorship history for sponsors and sponsored members

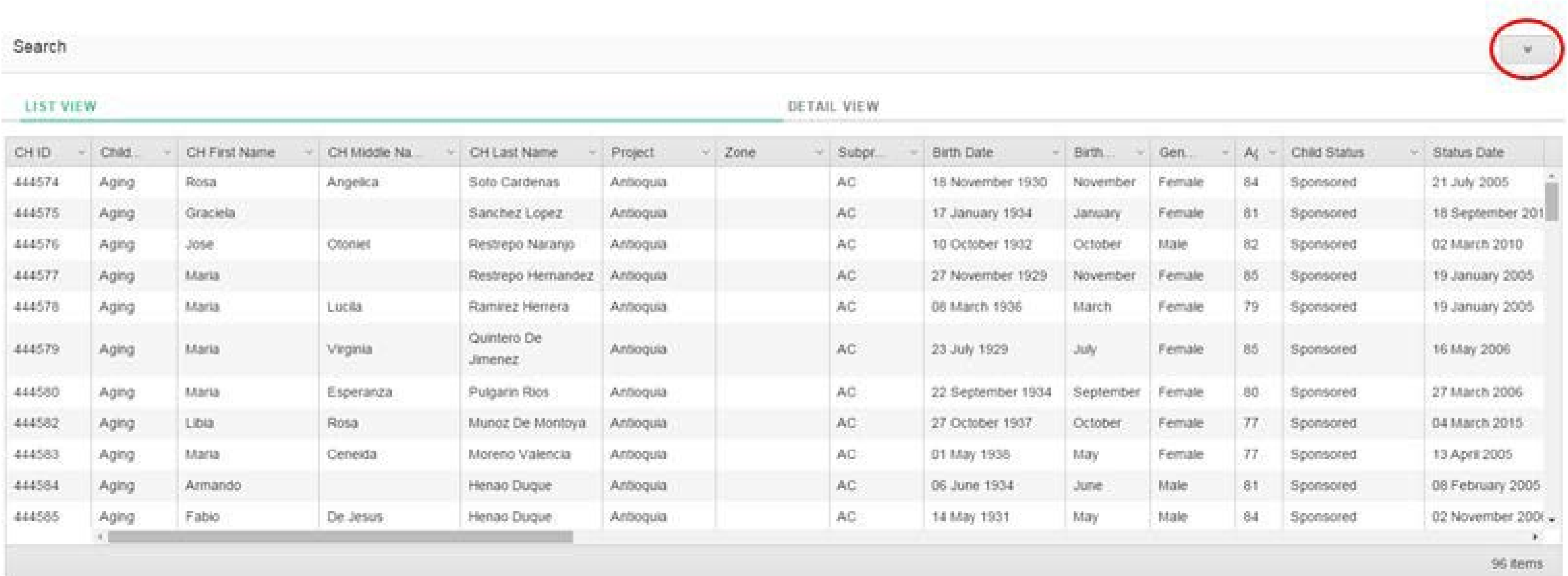
The "Include sponsorship history for sponsors and sponsored" checkbox can be checked to see the entire sponsorship history of a sponsored member or sponsor. For example, if a child has had more than one sponsor, specific information and dates of each sponsorship will be returned in the search results if this box is checked, one row per sponsorship. **It is very important to only select this checkbox when searching for a specific CH ID, full child name, sponsor's ASC ID or sponsor's full name. If a more general search for many sponsored members or sponsors is done while this checkbox is selected, it can cause the system to run slowly for all Portal users and return many search results.** If this checkbox is not selected, only one row per sponsored member will return in the search results grid, and it will include the most current sponsorship information.

3.1.7 Create Excel

If you wish to create an Excel file of the search results information, select the "Excel" checkbox before clicking, "Search." This will create a "Download as Excel" link with the search results that enables them to be downloaded in an Excel file. Once you click "Search," you may click on "Download as Excel" to open the Excel file. The file will open at the bottom of the Google Chrome window. Click on it to open it and save the Excel file to your computer.

3.1.8 Search results grid

After selecting search filters and clicking on search, the search results that match the selected filters will display in the search results grid. The search filters automatically collapse once the search button is clicked so that there is more room to view the search results. To view the search filters again, click on the double arrows:


Search

LIST VIEW   DETAIL VIEW

CH ID	Child...	CH First Name	CH Middle Na...	CH Last Name	Project	Zone	Subpr...	Birth Date	Birth...	Gen...	Ag	Child Status	Status Date
444574	Aging	Rosa	Angelica	Soto Cardenas	Antioquia		AC	18 November 1930	November	Female	84	Sponsored	21 July 2005
444575	Aging	Graciela		Sanchez Lopez	Antioquia		AC	17 January 1934	January	Female	81	Sponsored	18 September 201
444576	Aging	Jose	Otoniel	Restrepo Naranjo	Antioquia		AC	10 October 1932	October	Male	82	Sponsored	02 March 2010
444577	Aging	Maria		Restrepo Hernandez	Antioquia		AC	27 November 1929	November	Female	85	Sponsored	19 January 2005
444578	Aging	Maria	Lucila	Ramirez Herrera	Antioquia		AC	08 March 1936	March	Female	79	Sponsored	19 January 2005
444579	Aging	Maria	Virginia	Quintero De Jimenez	Antioquia		AC	23 July 1929	July	Female	85	Sponsored	16 May 2006
444580	Aging	Maria	Esperanza	Pulgarin Rios	Antioquia		AC	22 September 1934	September	Female	80	Sponsored	27 March 2006
444582	Aging	Libia	Rosa	Munoz De Montoya	Antioquia		AC	27 October 1937	October	Female	77	Sponsored	04 March 2015
444583	Aging	Maria	Ceneida	Moreno Valencia	Antioquia		AC	01 May 1938	May	Female	77	Sponsored	13 April 2005
444584	Aging	Armando		Henao Duque	Antioquia		AC	06 June 1934	June	Male	81	Sponsored	08 February 2005
444585	Aging	Fabio	De Jesus	Henao Duque	Antioquia		AC	14 May 1931	May	Male	84	Sponsored	02 November 200(

96 items

3.1.8.1 Search results grid fields

The search results grid contains the following fields:

- CH ID: ID number assigned to each sponsored member
- Child Type: the primary type of the sponsored member, either Child, Aging, or Vocation
- CH First Name: the first name of the sponsored member, as it appears in the Kansas database
- CH Middle Name: the middle name of the sponsored member, as it appears in the Kansas database
- CH Last Name: the last name of the sponsored member, as it appears in the Kansas database
- Project: the project to which the sponsored member belongs
- Zone: the zone to which the sponsored member belongs
- Subproject: the subproject to which the sponsored member belongs
- Birth Date: the date of birth of the sponsored member, in day/month/year format
- Birth Month: the month of birth of the sponsored member
- Gender: the gender of the sponsored member, either male or female
- Age: the age of the sponsored member
- Child Status: the status of the sponsored member, either Available, Change of Sponsor, Sponsored, or Retired

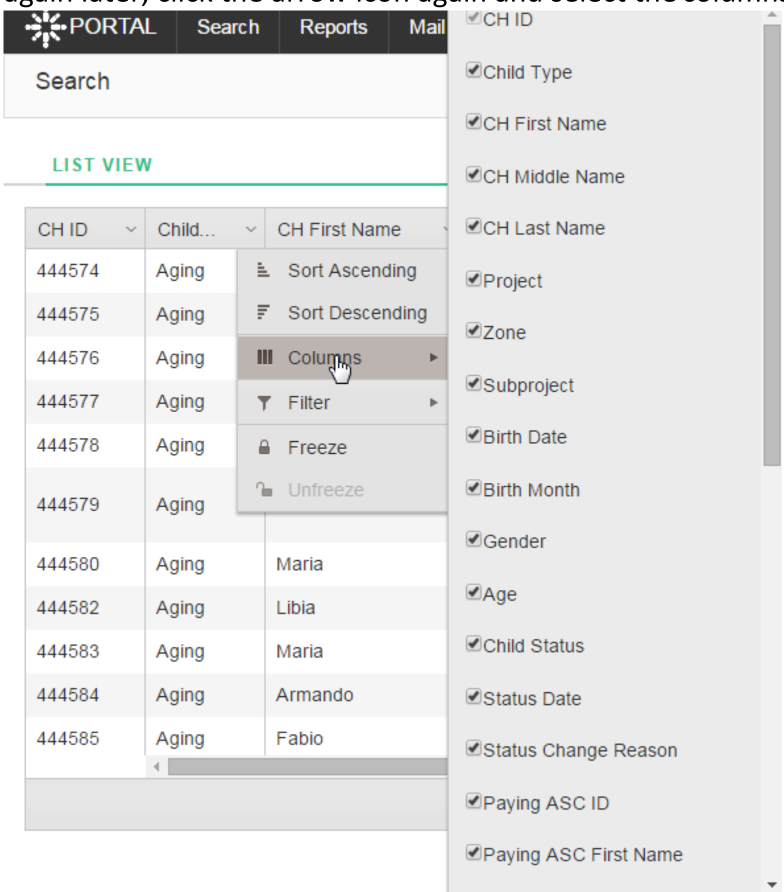
- Status Date: the date on which the child's most recent child status took effect, either the date on which the sponsored member was sponsored, entered Change of Sponsor status, was retired, or became available for sponsorship
- Status Change Reason: the reason for the most recent change in status, if there is one. This will typically be the retirement reason for retired members. However, if a member is in "Change of Sponsor" status and has a pending Update Request, the Status Change reason may say, "Update Request." If a member is in "Change of Sponsor" status and is in the category of "Benefits through," the Status Change Reason may say, "Graduated."
- Graduation Date: for youths in the status, "Benefits through," the graduation date or retirement date that is in the database in Kansas
- Paying ASC ID: the ID number of the sponsor who pays for the sponsorship
- Paying ASC First Name: the first name of the sponsor who pays for the sponsorship
- Paying ASC Last Name: the last name of the sponsor who pays for the sponsorship
- Paying ASC Full Name: the full name of the sponsor who pays for the sponsorship
- Paying ASC Gender: the gender of the sponsor who pays for the sponsorship, either Male, Female, Family, Group, or Unknown
- Paying ASC Language: the language of the sponsor who pays for the sponsorship, either English or Spanish
- Corresponding ASC ID: the ID number of the sponsor who writes to and receives letters from the sponsored member, if this sponsor is different from the paying sponsor
- Corresponding ASC First Name: the first name of the sponsor who writes to and receives letters from the sponsored member, if this sponsor is different from the paying sponsor
- Corresponding ASC Last Name: the last name of the sponsor who writes to and receives letters from the sponsored member, if this sponsor is different from the paying sponsor
- Corresponding ASC Full Name: the full name of the sponsor who writes to and receives letters from the sponsored member, if this sponsor is different from the paying sponsor Corresponding ASC Gender: the gender of the sponsor who writes to and receives letters from the sponsored member, either male, female, family, group, or unknown, if this sponsor is different from the paying sponsor
- Corresponding ASC Language: the language of the sponsor who writes to and receives letters from the sponsored member, either English or Spanish, if this sponsor is different from the paying sponsor
- Translate Child Letters: for Spanish-speaking projects, if a sponsor speaks Spanish, this field will say, "No", which means that the sponsored member's letters do not have to be translated to English. If this field says, "Yes," the sponsored member's letters must be translated to English.
- Initial Sponsorship Date: the date on which the sponsored member was sponsored for the first time
- Begin Date: the date on which the sponsored member's sponsorship began. If the sponsored member has only had one sponsor, the Begin Date will equal the Initial Sponsorship Date.
- End Date: the date on which the sponsored member's sponsorship ended.

- Last Letter: the date on which the last letter for which a sponsored member received credit was credited in Kansas
- Next Letter Due: the date on which the sponsored member's next regular letter is due
- Last Photo: the date on which the sponsored member's last photo was approved by the project in Portal
- Next Photo Due: the date on which the sponsored member's next photo is due
- Pending Kansas Verification: The time that Kansas needs to verify a photo can vary throughout the year because the quantity of photos sent changes each month. By looking at the last column in the search results grid, it is possible to know if the photo has been accepted by Kansas. If it has been accepted, this field will be blank. If it has not yet been reviewed in Kansas, the field will say, "Pending Kansas Verification," which means it is still possible that the photo could be declined. The "Pending Kansas Verification" status will appear within one hour of the photo being approved by the project in Portal.

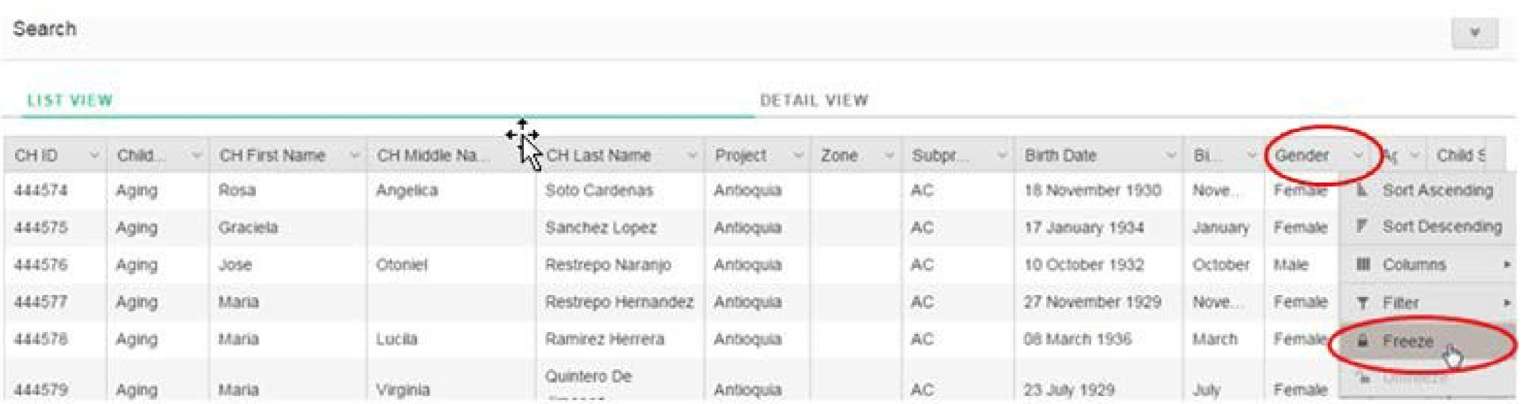
3.1.8.2 List View - Search results grid features

- Number of items in search results: the number of items matching the search criteria displays in the lower right-hand corner of the search results grid
- To sort the search results by a certain column, click on the column header once to sort in ascending order. Click on the column header again to sort in descending order.
- To filter the search results by a certain column, click on the arrow icon at the top of a column, then select the filter option. Select a value in the "Show items with value that" drop-down menu. Optionally, select "And" or "Or" and select another value. Click the "Filter" button to view only those search results that match the filters. To clear the search filter, click on the filter icon of the filtered column and click on the "Clear" button.

- To hide specific columns in the search results grid, click on the arrow icon at the top of any column, then deselect the columns you would like to hide. To show the columns again later, click the arrow icon again and select the columns:



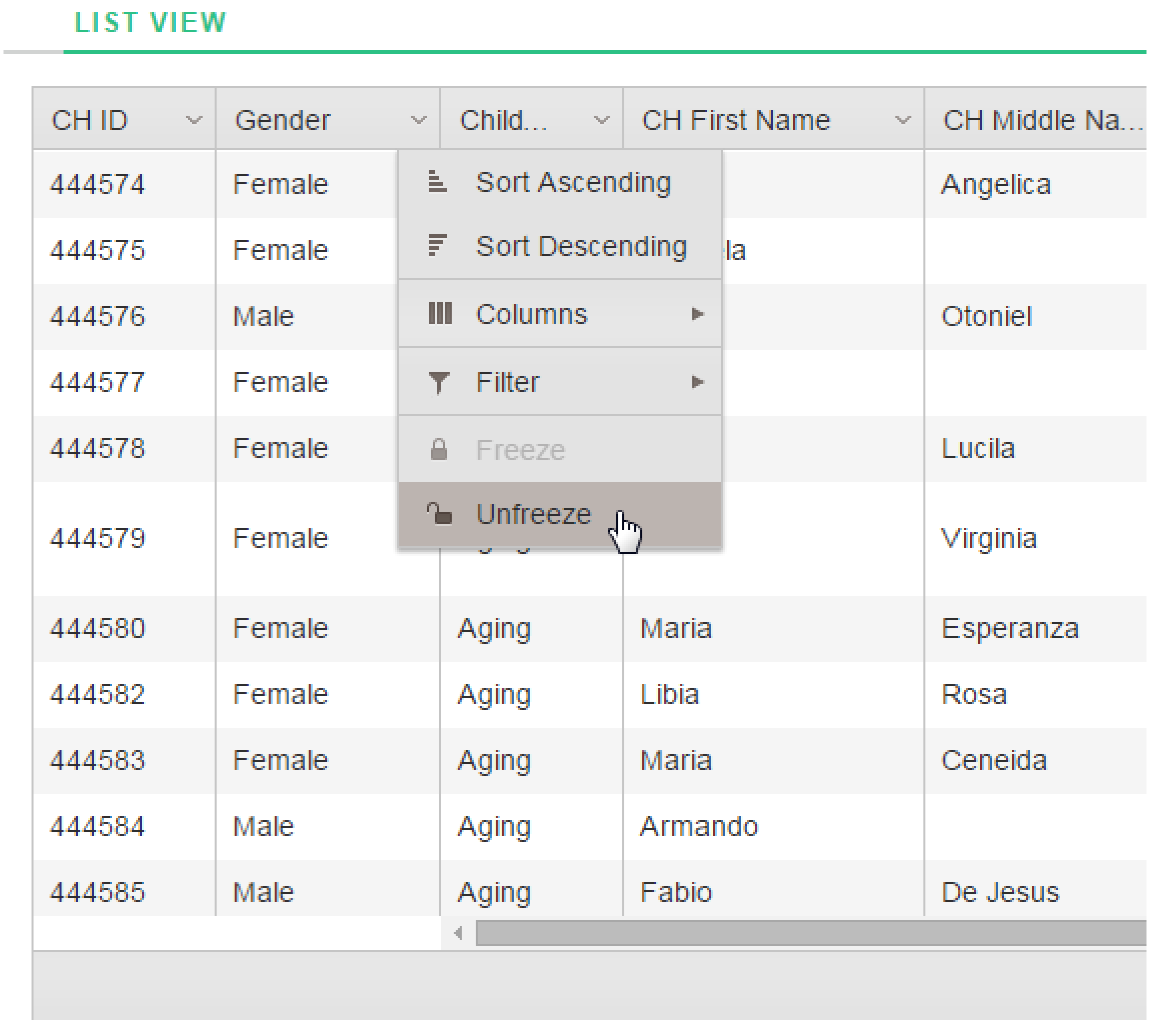
- To freeze a column(s) of the search results, click on the arrow at the top of a column and select "Freeze":



The column(s) selected to be frozen will move to the right of the CH ID column in the search results grid, and they will not move as you scroll to the right to view the rest of the columns in the search results:

CH ID	Gender		Corresponding ASC L...	Translate Chil...	Initial Sponsor...	Begin Date	End Date	Next Letter Due	Next Photo Due
444574	Female			Yes	21 July 2005	21 July 2005		25 April 2015	02 March 2016
444575	Female			Yes	18 January 2006	18 September 2014		27 May 2015	02 March 2016
444576	Male			Yes	03 February 2005	02 March 2010		07 May 2015	02 March 2016
444577	Female			Yes	19 January 2005	19 January 2005		07 May 2015	20 February 2015
444578	Female			Yes	19 January 2005	19 January 2005		07 May 2015	20 February 2015
444579	Female			Yes	26 July 2005	16 May 2006		25 April 2015	02 March 2016
444580	Female			Yes	20 April 2005	27 March 2006		25 April 2015	02 March 2016
444582	Female		English	Yes	15 March 2005	04 March 2015			02 March 2016
444583	Female			Yes	13 April 2005	13 April 2005		02 October 2015	02 March 2016
444584	Male			Yes	08 February 2005	08 February 2005		02 October 2015	02 March 2016

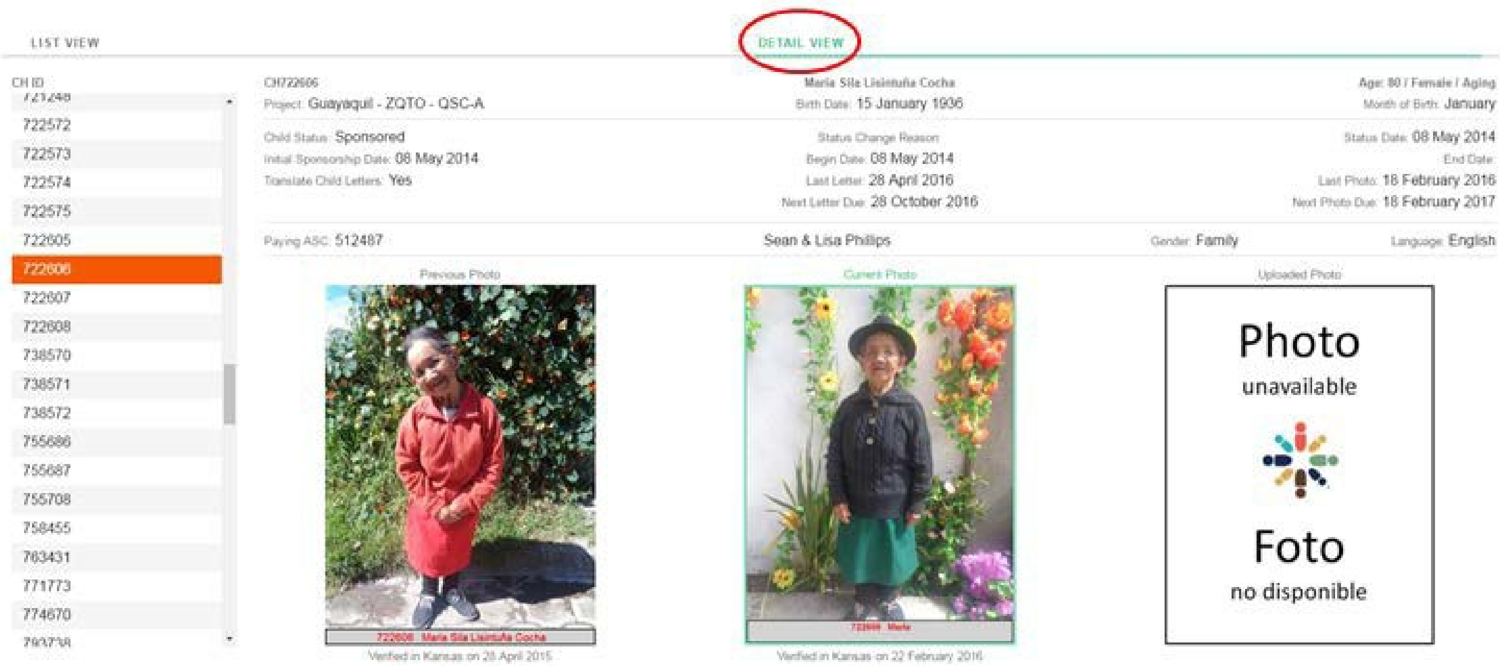
To unfreeze the column again, click on the arrow at the top of the column and select, “Unfreeze”:



- If you selected, “Create Excel” before clicking “Search,” you will see a link to download the search results to an Excel file. Click this link to open the Excel file. It will open at the bottom of the Google Chrome window. Click on it to open it and save the Excel file to your computer.

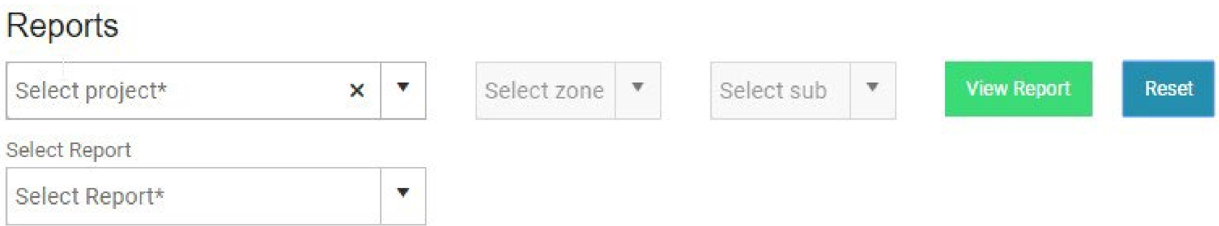
3.1.8.3 Detail View

By clicking on the Detail View of the search results, a list of CH IDs meeting the selected search filter(s) appears on the left. By selecting a CH ID, the information for the selected sponsor member displays. The previous annual photo and current photo also displayed. If the sponsored member has had a photo uploaded recently that has not yet been reviewed, this photo also displays. The user can navigate to view the photos of another CH ID by clicking on the CH ID with the mouse or by using the up and down arrows on the keyboard.



4 Reports Page

4.1 Reports Access



All of the information on the Reports page is filtered according to the user's access. For example, a user at the project level will be able to see report information for all sponsored members within that project. For those projects that have zones, a user with access to only one zone would only be able to see report information for sponsored members within that zone. For a user with access to only one subproject, he/she would only be able to see report information for sponsored members within that subproject.

The project will be defaulted in the "Select Project" drop-down menu for all users. If the user only has access to one zone, the zone will be defaulted in the "Select Zone" drop-down menu. Otherwise, to select a subproject, the user will have to either select a zone or "None" in the zone drop-down menu to see report information from only one zone. If the user only has access to one subproject, the subproject will be defaulted in the "Select Subproject" drop-down menu. Otherwise, the user will have to select a subproject to see report information from only one subproject.

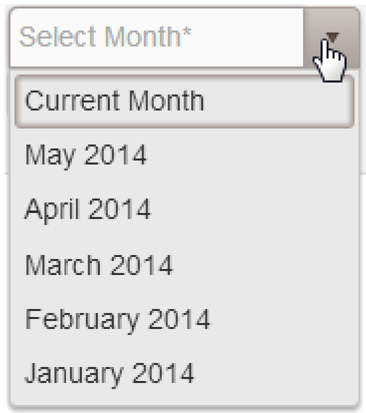
4.2 Report Features

4.2.1 Including inactive projects, zones, and subs

The "Include inactive projects, zones, and subs" checkbox may be selected to include inactive projects, zones, and subprojects to which the user had access before they were inactivated in the "Select Project," "Select Zone," and "Select Sub" drop-down menus. This may be helpful to see information from subprojects that were closed.

4.2.2 Current month and static month reports

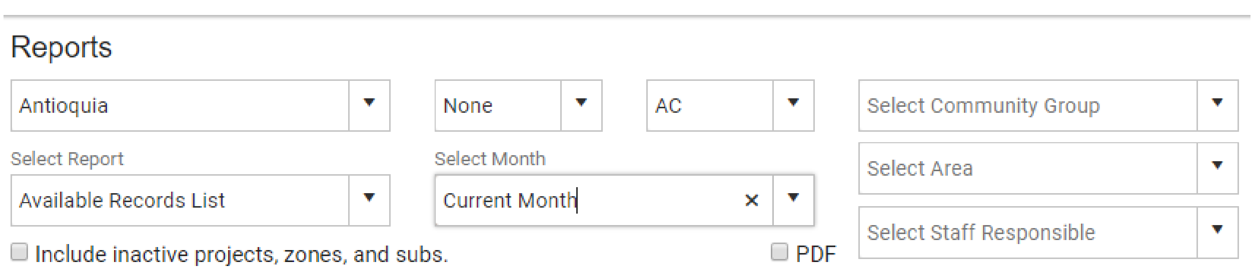
Most Portal reports have the option to select either the current month report or a static month report, such as January 2014, February 2014, etc. The financial reports (Education Funds, Financial Detail, and Financial Memo) only have the static month report options. Other reports only have the current month option. After a project, zone, subproject, and report have been selected, a user must select a month option:



- Current month: the current month report includes the most current information from the Kansas database. Depending on the report, it has live information or information that is updated hourly.
- Static month: the static month report options include information as of the first of each month, Kansas time. For example, the February 2014 report includes information as of the first of February, 2014, and the information on this report will not change regardless of when the report is generated.

4.2.3 Community Group, Area and Staff Responsible filters

Current month versions of reports and reports with customizable date ranges can also be filtered by community group, area and staff responsible. To filter a report by one or more of these fields, select a project, zone and subproject. Then select a report and the current month option. You will then see the community group, area, and staff responsible filters. Using one of these filters will restrict the report results to those sponsored members that have the selected community group, area or staff responsible selected on their record.



4.2.4 Date range filters

Some reports have date range filters. The default date range will include the last 30 days but can be changed.

4.2.5 View Report and Reset buttons

After the desired report filters have been selected, click on the “View Report” button to view the report information. To clear the selected filters and return them to their default values, click the “Reset” button.

4.2.6 Download current month’s Access database

The current month’s Access database can be downloaded from Portal if your project has requested it. This option is available to Coordinators, Lead Accountants and Project Admins at the project level. Other users will not see this option. Only the current month’s Access database is available through Portal, so it is important to save a copy of previous months’ databases before the first of the following month, Kansas time, when the next month’s database will be made available.

4.2.1 Download as Excel

After report filters are selected and “View Report” is clicked, the report information displays. To download this information in an Excel file, click on the “Download as Excel” link. The file will open at the bottom of the Google Chrome window. Click on it to open it and save the Excel file to your computer.

4.2.2 Report Generated Date

Each report shows the Report Generated date at the bottom of the report. If you believe there is a discrepancy with Portal data, please provide the Excel file of the report and the Report Generated date to your Kansas Project Specialist so that we may investigate the discrepancy.

Report Generated: 30 December 2013 10:00 AM CST.

4.2.3 Number of items on each report

For most reports, the number of items on the report can be seen at the bottom of the report. The Financial Memo report does not show the number of items.

4.3 Report types

The following reports are available on the Reports page:

4.3.1 Areas

The Areas report shows a list of all areas in the selected project, zone or subproject. This report is available as a current month report only.

4.3.2 Available Records List

The Available Records List shows all of the family records that have been received and processed by Unbound-Kansas that are awaiting sponsorship. This list is only for new applicants who have not yet been sponsored. Please note that beneficiaries in change of sponsor status will not be included in this list as they are still receiving benefits and thus appear on the Beneficiary List. Projects should review this list, and verify that all of the information is correct and submit an Exit Page for anyone that should be retired. Please be aware that some names will reappear on the list of available records every month until Unbound-Kansas finds a sponsor for the member. Both current month and static month versions of this report are available.

4.3.2.1 Reserved records

It is possible to see if the record of someone waiting for sponsorship is reserved to a sponsorship campaign or to a sponsor on the Available Records List and Beneficiary List and as of what date. If a record is reserved to a campaign, this means Kansas or a volunteer advocate is actively looking for a sponsor at a church campaign or another type of campaign, or the record has been shared on the Unbound.org website. Records stay reserved to church campaigns for up to 45 days and to volunteer advocate campaigns and the Unbound website for up to 60 days. If a sponsor has not been found at that point, the record will be assigned to another campaign.

If a record has been reserved to a sponsor, this means that a sponsor has said he/she would like to sponsor the person waiting for sponsorship but has not yet paid for the sponsorship. The record will be reserved to the sponsor for up to 90 days. If the sponsor has not paid by that point, the record will then be assigned to a sponsorship campaign.

The fact that a record is reserved to a campaign or to a sponsor is not a guarantee that the person waiting for sponsorship will be sponsored. **Please do not tell a family that someone has been sponsored until you see that the name of that person on the Welcome List.**

The “Record reserved” field can be helpful when potential sponsors or sponsors are visiting the project because it is possible to see who is truly available for sponsorship versus who is already reserved to a sponsor or campaign. However, even if you see that a record is currently not reserved, please always communicate with Kansas as soon as possible if someone is interested in sponsoring someone in Available or Change of Sponsor status so that we can reserve the record to this potential sponsor.

If the record is reserved to a campaign, the "Record reserved" field will say "Campaign" and the date on which the record was reserved to that campaign. If the record is reserved to a sponsor, the "Record reserved" field will show the ASC ID of the sponsor and the date on which the sponsor reserved the record. If this field is blank, it means the record is not currently reserved to either a campaign or a sponsor.

4.3.3 Beneficiaries with Pending Items

The Beneficiaries with Pending Items report shows any beneficiary with a pending or overdue regular letter, welcome letter, photo, update request or speed letter. It also shows beneficiaries with available education funds or sponsored family need funds. Only the current month version of this report is available. The static month version is not available.

4.3.4 Beneficiary List

The Beneficiary List is a list of all of the sponsored children, aging and vocation who receive benefits. It should be noted that any beneficiaries in change of sponsor status will be included on this list as they should continue to receive benefits. No sponsor will be listed for these individuals; instead this column will read "Change in Sponsor." Both current month and static month versions of this report are available.

For individuals in Change of Sponsor status, it is possible to see if their record is reserved to a sponsorship campaign or sponsor in the "Record reserved" column. Please see "Reserved records" under the Available Records List report section for more information.

4.3.5 Community Group Detail

This report shows community groups in the selected project, zone or subproject, along with their members (representatives and their details) and the sponsored members they represent. This report is available as a current month report only.

4.3.6 Community Group

This report shows all community groups within the selected project, zone of subproject. This report is available as a current month report only.

4.3.7 Custom Fields Information – Children and Youth

This report shows information entered into the custom fields on family records in Portal for any non-retired children and youth.

4.3.8 Custom Fields Information – Elders

This report shows information entered into the custom fields on family records in Portal for any non-retired elders.

4.3.9 Letters and Videos Uploaded

This report shows digital letters and videos uploaded within the specified date range along with their status.

4.3.10 Education Funds

This report lists the children who currently have an education account with a balance. The report also includes the name of the sponsor who has provided the education account and any scheduled disbursements. The report includes both children who have a disbursement schedule and children who do not have a disbursement schedule. Only the static month version of this report is available. The current month version is not available.

4.3.11 Exit Pages Declined

This report shows all exit pages that are currently declined by Kansas or the project that have not yet been resubmitted to Kansas.

4.3.12 Family Records Declined by Kansas

This report shows all family records that have been declined but not yet resubmitted along with the reason that they were declined. This report is available as a current month report only.

4.3.13 Family Records Feedback

This report shows information from family records quality reviews in Kansas.

4.3.14 Financial Detail

The Financial Detail report includes the grants sent to the project each month. It also includes Sponsored Family Needs and Sponsored Most in Need funds and the subprojects or beneficiaries designated for these funds. Only the static month version of this report is available. The current month version is not available.

4.3.15 Financial Memo

The Financial Memo is designed to present a simple overview of the contributions received by each project. It includes information on number of sponsored aging, children or vocations in the project; number of sponsors sending their monthly sponsorship payment; amount of money available per sponsored member; birthday funds; Unbound grants (restricted); sponsor grants (restricted); service-scholarship grants (restricted); sponsored family need funds (partially restricted); sponsored community needs funds (partially restricted); sponsored most in need funds (partially restricted); expense reimbursements; deductions and other contributions. Only the static month version of this report is available. The current month version is not available. This report can only be generated at the project level.

4.3.16 Letters and Videos Declined

This report shows all digital letters and photos declined within the specified date range. Letters and videos can be declined from the review screen in Portal, from the Translation Module by a Kansas Admin or from the database in Kansas.

4.3.17 Letter and Video Feedback

This report shows feedback provided on digital letters and videos from the project and Kansas, which should be considered for future letters and videos.

4.3.18 Mail Received

The Mail Received reports shows all mail recorded in Portal for the selected project, zone or subproject that arrived within the selected date range. eLetters will have links on this report that will open the PDF file of the eLetter. If a photo was attached to the eLetter, it will be included in the PDF file.

4.3.19 Mail with No Reply Letter Sent

The Mail with No Reply Letter Sent report shows all mail recorded in Portal for the selected project, zone or subproject that arrived within the selected date range, for which “Reply letter required” was selected and for which “Reply letter sent” has not been selected. eLetters will have links on this report that will open the PDF file of the eLetter. If a photo was attached to the eLetter, it will be include in the PDF file. If a child received a letter and later enters change of sponsor or retired status, the pending reply letter will automatically be removed from this report on a daily basis through a process that runs at 9:30 p.m., Kansas time.

4.3.20 Original Letters Not Received in Kansas

If a sponsor has indicated that they wish to receive original letters from their sponsored friend instead of the scanned, printed version, letters for these sponsored members will not be credited until the original letters are received in Kansas. This report shows digital letters that have been uploaded and approved for which original letters have not been received.

4.3.21 Packets Received in Kansas

The Packets Received in Kansas report is a summary of the shipping forms that accompany packets sent to Unbound-Kansas. It lists the packets received in Kansas. The report is divided by packet number and then details the date sent and date received. The type and number of each item received are listed as well, with a space for comments from Unbound-Kansas about each item/packet. This report is only available at the project level. Both current month and static month versions of this report are available.

4.3.22 Pending Project & International Communications

This report lists the pending international and project communications sent to the project. The purpose of this report is to bring to the project’s attention international and project communications that have not yet been answered so that they can be answered as quickly as possible. Both current month and static month versions of this report are available.

4.3.23 Pending Speed Letters

This report lists the pending speed letters sent to the project. The purpose of this report is to bring to the project's attention speed letters that have not yet been answered so that they can be answered as quickly as possible. Both current month and static month versions of this report are available.

4.3.24 Pending Update Requests

This report lists the pending update requests sent to the project. The purpose of this report is to bring to the project's attention update requests that have not yet been answered so that they can be answered as quickly as possible. Both current month and static month versions of this report are available.

4.3.25 Photos Declined by Kansas

This report lists all photos declined by Kansas for the selected project, zone or subproject. Update Requests will no longer be sent for each individual declined photo and it will be necessary to check this report to view declined photos. The current month version of this report shows all currently declined photos, while the static month reports show the history of declined photos as of the first of each month. Each CH ID listed on the report is a hyperlink that will open to show the previous annual photo, the current photo in Kansas, and the recently uploaded photo that was declined. The declined reason appears at the bottom of the screen, and it is also viewable on the report:

Unbound
Atitlan - SPZ
Photos Declined by Kansas
Current Month - September 2015

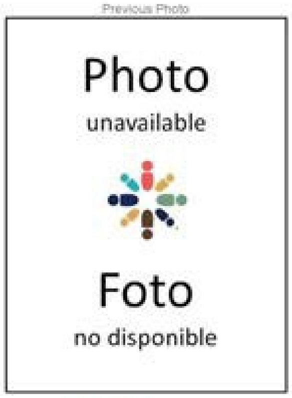
Zone	Subproject	Type	CH ID	First Name	Middle Name
	SPZ	Niño	794561	Mynor	Manuel
	SPZ	Niño	794518	Marta	Alicia

CH794518 ✖

CH794518	Marta Alicia Suy Mejia	Age: 6/Female/Child
Project: Atitlan - SPZ	Birth Date: 27 July 2009	Month of Birth: July
Child Status: Sponsored	Status Change Reason:	Status Date: 04 August 2015
Translate Child Letters: Yes	Next Letter Due:	Next Photo Due: 28 September 2016
Initial Sponsorship Date: 04 August 2015	Begin Date: 04 August 2015	End Date:

Paying ASC: 452107 John & Sharon Federle Gender: Family Language: English

Previous Photo



Current Photo

Verified in Kansas on 18 July 2014

Uploaded Photo

Declined on 28 September 2015

Decline Reason: Same As Previous Photo

4.3.26 Photos Declined by Project

This report lists all photos declined by the project for the selected project, zone or subproject within the selected date range. After all of the photos in a batch have been reviewed by the project, the declined photos appear on this report. The declined photos remain on this report even if a new photo for the beneficiary is uploaded and approved.

4.3.27 Photo Reminders List

The Photo Reminders report is a list of all of the sponsored members whose photo is due or overdue. The report is organized by subproject and indicates the status of the photo. The report also includes a total number of photos in each status for the project: Photos Due, Late Photos, Retirement Warning and Retirement. Both current month and static month versions of this report are available.

4.3.28 Photos Uploaded

The Photos Uploaded report shows all photos uploaded within the specified date range along with their status. The "Reviewed by" column shows the Portal or Kansas user that most recently reviewed the photo.

4.3.29 Regular Letter Reminders

The Regular Letter Reminders report is a list of all of the sponsored members whose letter is due or overdue. The report is organized by subproject and indicates the status of the letter. The report also includes a total number of letters in each status for the project: Letters Due, Late Letters, Retirement Warning and Retirement. Both current month and static month versions of this report are available.

4.3.30 Retired Member List

The Retired Member List includes any child, aging or vocation retired from the Unbound program during the selected date range The report indicates the reason why the sponsored member was retired from the program, the last graded passed of children and youth, if a Farewell Letter was required, the author of the Farewell Letter, the reason the sponsored member did not write the letter (if applicable), vocational/technical training information and contact information for youth over 18 (if provided).

4.3.31 Welcome Letter Reminders

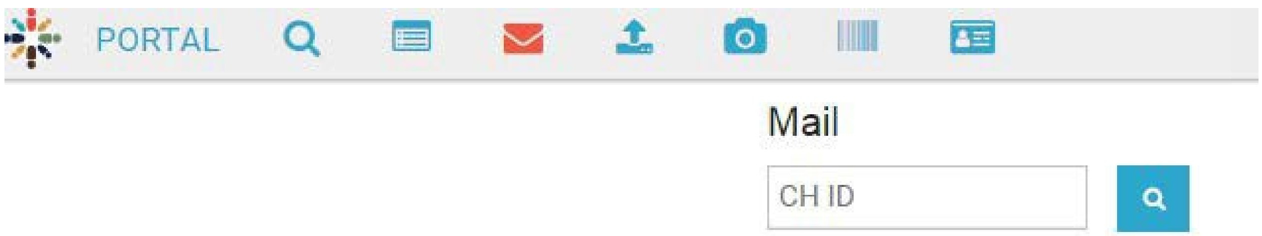
The Welcome Letter Reminders report is similar to the Regular Letter Reminders report, but this report shows the beneficiaries who have not yet written their new sponsors. Once 4-5 months have passed without a beneficiary writing their new sponsor, he/she will automatically be retired from the program without further warning. The report includes a total number of

Welcome Letters in each status for the project: Letters Due, Late Letters, Retirement Warning and Retirement. Both current month and static month versions of this report are available.

4.3.32 Welcome List

The Welcome List details all sponsored members who are beginning a new relationship with a sponsor. This list includes individuals who are being sponsored for the first time and those who were previously in change of sponsor status but have been assigned a new sponsor. Both current month and static month versions of this report are available.

5 Mail Page

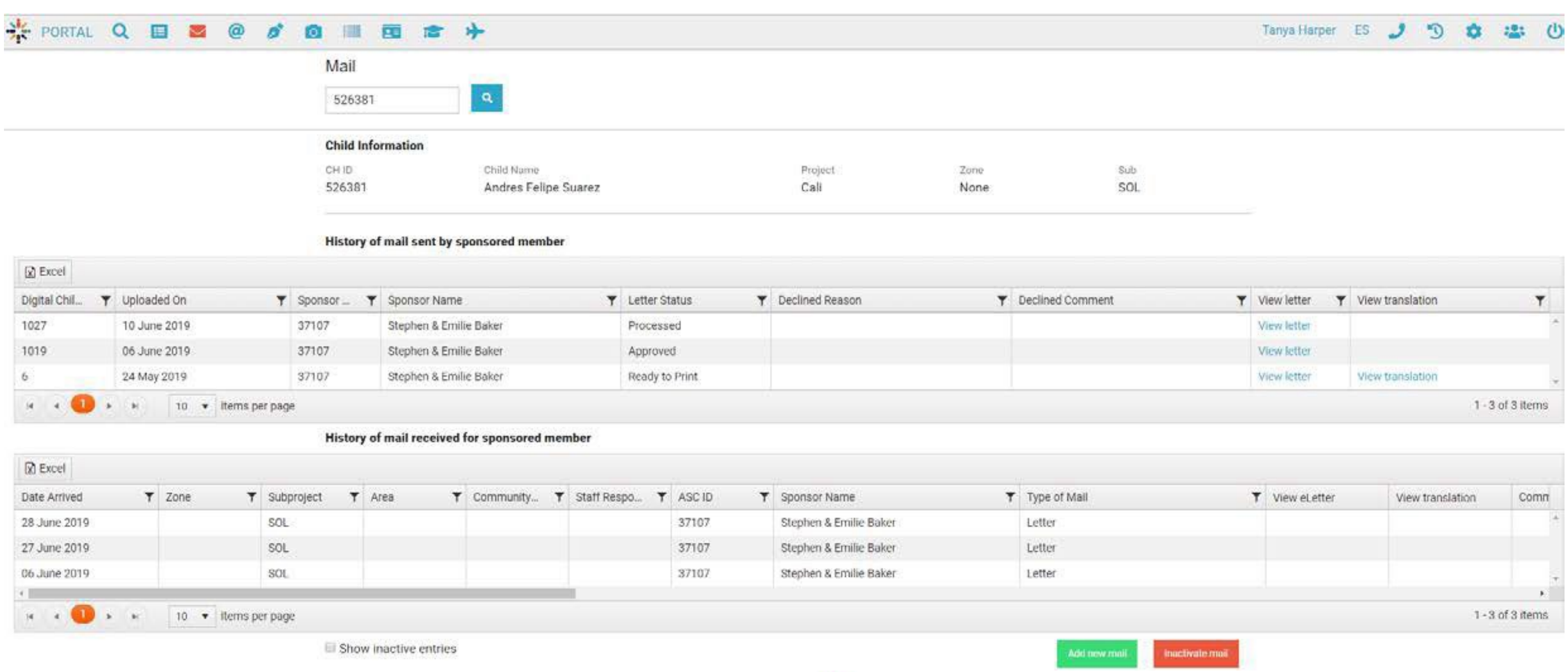


5.1 Mail Access

The Mail tab is available to Portal users with the role of Coordinator, Project Admin, Correspondence Staff, Social Worker and Internal Translator.

5.2 Entering a CH ID

Enter a CH ID in the CH ID field and type Enter or click on the magnifying glass icon to view a list of sponsor mail that has been recorded for that sponsored member or to enter new mail. This field only accepts numbers. Portal users can only view mail information for CH IDs that belong to the project, zone and/or subprojects to which they have access. After entering a CH ID, the sponsored member's CH ID, full name, project, zone and sub will appear as view only in the top section of the screen. Any digital letters that have been uploaded for the sponsored member will appear in the "History of mail sent by sponsored member" grid, and any sponsor mail that has been entered for the sponsored member will appear in the "History of mail received for the sponsored member" grid:



5.3 History of Mail Sent by Sponsored Member

Any digital letters that have been uploaded for the sponsored member will appear in this grid with the following columns:

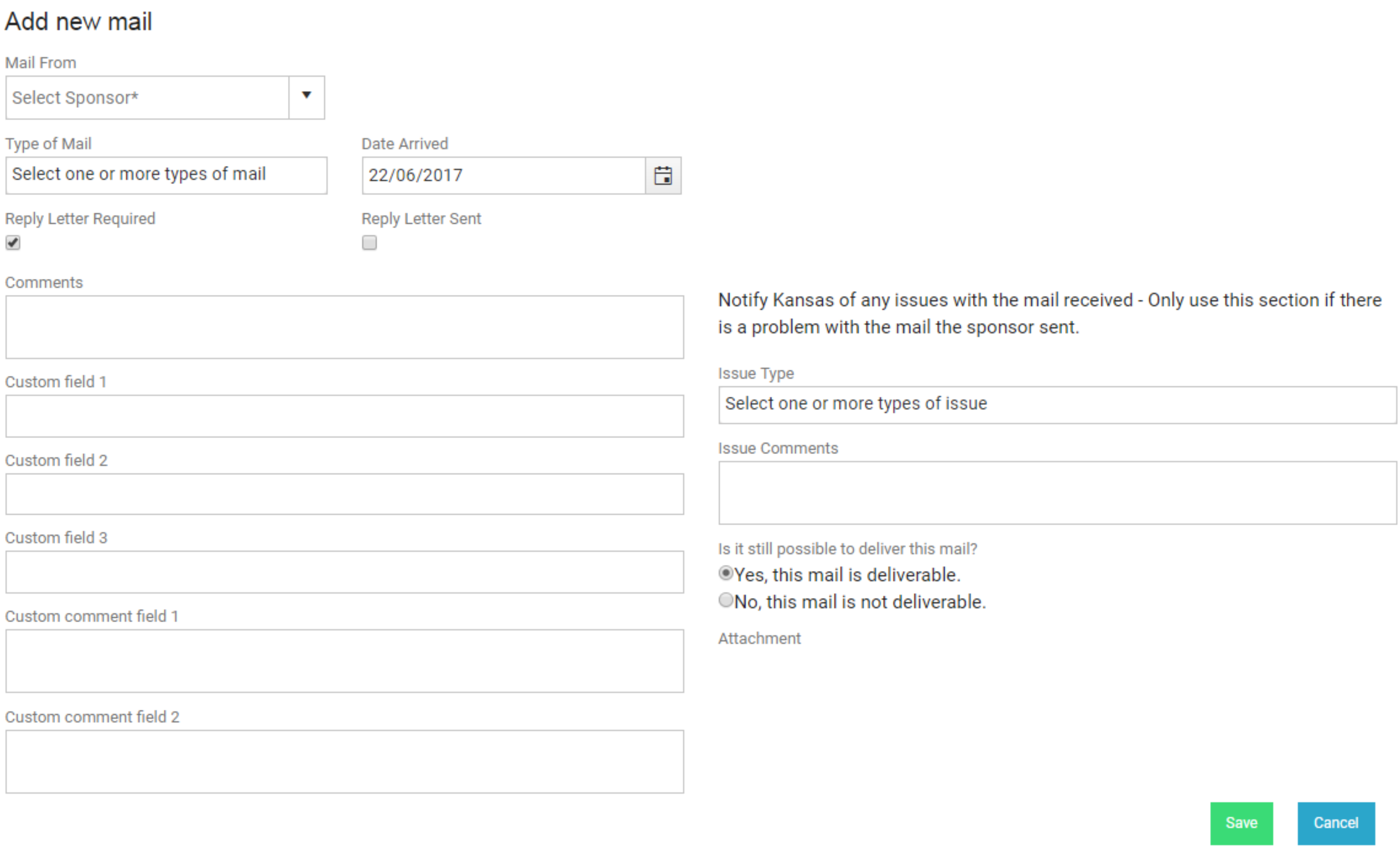
- Digital Child Letter Batch ID
- Type
- Uploaded On
- Sponsor ASC ID
- Sponsor Name
- Status
- Declined Reason
- Declined Comment
- View letter: a hyperlink that opens the PDF of the digital letter
- View translation: if the letter was translated in the Translation Module, a hyperlink that opens the PDF of the translation
- View video: a hyperlink that opens the video in a new tab.
- Download video: a hyperlink that opens the video in a new tab. Then, click the ellipsis to see the option to download the video.

Excel: the history of digital letters for the sponsored member can be exported to Excel by clicking on the Excel icon on the grid.

5.4 Adding New Sponsor Mail

To add new mail that a sponsor sent to a sponsored member, click on the “Add new mail” button:

The “Add new mail” information will appear below the “History of mail received for sponsored member” grid:



Add new mail

Mail From

Select Sponsor*

Type of Mail

Select one or more types of mail

Date Arrived

22/06/2017

Reply Letter Required

Reply Letter Sent

Comments

Custom field 1

Custom field 2

Custom field 3

Custom comment field 1

Custom comment field 2

Notify Kansas of any issues with the mail received - Only use this section if there is a problem with the mail the sponsor sent.

Issue Type

Select one or more types of issue

Issue Comments

Is it still possible to deliver this mail?

Yes, this mail is deliverable.

No, this mail is not deliverable.

Attachment

Save

Cancel

- Mail from: this is a drop-down that includes each sponsored member's current and previous corresponding and paying sponsors. There is also an "Other" option in case a sponsored member receives mail from another sponsor who is not currently or who has never sponsored the sponsored member. This is a required field.
- Type of Mail: the following options are available: Letter, Photo, Other and Gift drop-off – do not log issue. At least one option is required but multiple options can be selected. The option "Gift drop-off – do not log issue" can be used to specify that a sponsor visited the project office and delivered a gift for his/her sponsored child or on behalf of another sponsor. This is allowed. However, any items that are received through the mail that are not a letter, photo or greeting card should be reported as an issue using the "Notify Kansas of any issues with the mail received" section.
- Date Arrived: a required date field that defaults to today's date but that can be changed if needed. This is the date the mail arrived to the project.
- Reply Letter Required: a checkbox that defaults to checked to indicate that a reply letter is required. This checkbox may be unchecked if the project determines that a reply letter is not needed. For any person who is not currently sponsored (available, change of sponsor or retired), a reply letter is not required and it is not possible to check this box.
- Reply Letter Sent: once a reply letter has been written, the mail entry may be edited in order to check this box to indicate that the reply letter has been sent. By checking this box, the mail entry will no longer appear on the "Mail with No Reply Letter Sent" report, meaning that the reply has been sent and is no longer pending. It is also possible to mark reply letters as sent by clicking the "Mark as reply" button for the sponsor mail entry on the Digital Letters review screen. Clicking this button will also populate the date the reply letter was sent on the sponsor mail entry in the Mail screen.
- Packet Number: if "Reply Letter Sent" is checked, this optional field appears in order to indicate in which packet the reply letter was sent to Kansas.
- Comments: a text field where more specific information about the mail can be entered. This field is required if "Other" is selected as the sponsor in the "Mail From" field or if "Other" is selected as the Type of Mail.
- Custom fields: if the Project Administrator has named custom fields for the project to use to track additional information about mail, this information can be entered here.
- Notify Kansas of any issues with the mail received: in this section, Portal users can notify Kansas of issues with the mail so that the sponsor can be contacted about it. This section should only be completed if there is an issue with the mail received. It is very important to log issues correctly and only when appropriate because Kansas will contact the sponsor in hope of avoiding future issues.
- Issue Type: the following issue types are available. Multiple issue types can be selected:
    - Contact information given: if a sponsor's address is only on the envelope, this does not need to be reported in Portal. Please only report that contact information was given if the information is included in the letter itself.
    - Money sent (cash)

    - Money sent (check): if a sponsor sends a check, please write the CH ID number on the check and return it to Kansas. Please include the check number and the amount of the check in the issue comments field. If the check is reported through Portal and returned to Kansas, it is no longer necessary to complete the Returned Funds Form.
    - Package sent: sponsors are now asked not to send packages of any size to their sponsored friends, so if a package is received, please use this issue type to notify Kansas of the issue. If this issue type is selected, the mail entry should also be marked as not deliverable since packages should not be delivered to sponsored members.
    - Large package sent, requiring customs fees: this issue type will be removed for new mail entries in the future now that we ask sponsors not to send any packages of any size. It can still be used for the time being if a package requires customs fees.
    - Requested to visit sponsored member
    - Other
- Issue Comments: a text field where more information about the issue can be provided. This field is required if an issue type is selected so that Kansas has as much information as possible when contacting the sponsor about the issue.
- Is it still possible to deliver this mail? It is possible that a piece of mail has an issue but that it is still deliverable. For example, if an email is address is provided, it can be blacked out and the letter can then be delivered to the sponsored member. If the piece of mail has an issue that would prevent the mail from being delivered to the sponsored member, please select the button, “No, this mail is not deliverable.” If a sponsor sent a package, the mail entry should be marked as not deliverable.
- If “Other” is selected as the sponsor and there is an issue with the mail, please contact your regional team in Kansas about this issue outside of Portal. Kansas will not be automatically notified of issues reported when “Other” is selected as the sponsor.
- Attachment: once the mail entry is saved, it is possible to click on the mail entry in the mail received grid and add an attachment to the mail entry, for example, a scanned copy of the letter received. It is only possible to attach one PDF file per mail entry. The file name can only contain letters, numbers, hyphens, underscores and periods. Spaces are not allowed. The file cannot be larger than 5 MB. Adding an attachment is optional in most cases, but if a sponsor provided contact information in a letter, please scan the letter, attach it and report the issue through Portal so Kansas can follow up with the sponsor. If a sponsor sends a check, please do NOT scan this for security reasons.
- Save button: click the Save button to save the mail entry

5.5 eLetters

eLetters that sponsors write will be automatically logged in Portal for each sponsored member with the mail type, “eLetter.” If a photo is attached to the eLetter, the mail type of “photo” will also be selected. eLetter entries can be edited to enter a comment, to indicate if a reply letter is required or already sent, or to notify Kansas of an issue. However, the Mail From, Mail Type, and Date Arrived fields may not be edited. PDF documents of eLetters can be printed from the Mail page or from the Mail reports.

5.6 History of mail received for sponsored member grid

The “History of mail received for sponsor member” grid shows the following information for the sponsor mail that has been entered.

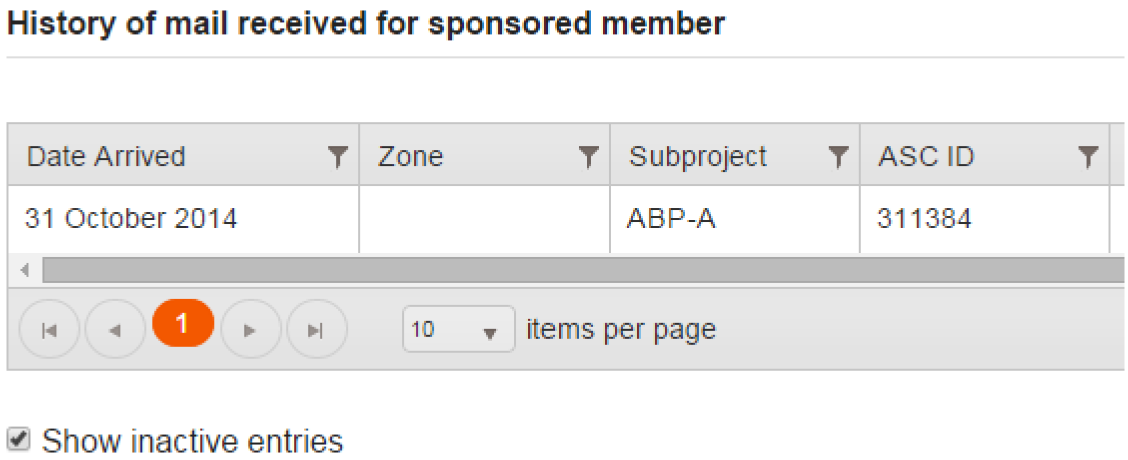
- Date arrived: the date the mail arrived to the project
- Zone: the zone of the sponsored member, if applicable
- Subproject: the subproject of the sponsored member
- ASC ID: the ASC ID of the sponsor that sent the mail
- Sponsor Name: the full name of the sponsor that sent the mail
- Type of Mail: the type(s) of mail selected when the mail was logged, either Letter, Photo, Gift, Other or eLetter. If the type of mail is eLetter, the word “eLetter” can be clicked to open a PDF of the eLetter to save or print. If a photo was attached to the eLetter, it will also be included in the PDF file.
- Comments: the comments entered when logging the mail, if applicable
- Issue Type: the issue type(s) selected when logging the mail, if applicable
- Issue Comments: the comments entered to give more information about the issue if one was reported
- Deliverable: this field states if it was still possible to deliver the mail to the sponsored mail if there was an issue with it.
- Reply Letter Required: states if a reply letter was required to be written to respond to the sponsor
- Reply Letter Sent: states if the reply letter has already been sent
- Packet Number: if the reply letter has been sent, this is the packet number in which it was sent
- CH ID: the CH ID of the sponsored member
- Child Name: the full name of the sponsored member
- Last Modified By: the user who last modified each mail entry
- Active: states if the mail entry is active or inactive
- Inactive Reason: the reason the mail entry was inactivated, if applicable
- Custom fields: any additional information the project has optionally decided to track in the custom fields for sponsor mail

5.7 History of mail received for sponsored member grid features

- To sort the mail entries by a certain column, click on the column header once to sort in ascending order. Click on the column header again to sort in descending order.
- To filter the search results by a certain column, click on the filter icon at the top of a column. Select a value in the “Show items with value that” drop-down menu. Optionally, select “And” or “Or” and select another value. Click the “Filter” button to view only those search results that match the filters. To clear the search filter, click on the filter icon of the filtered column and click on the “Clear” button.
- Page navigation buttons: these buttons at the bottom of the search results grid can be used to navigate to the first, previous, next, or last page of search results.
- Page number buttons: click on a specific page number to navigate to that page of the search results
- Items per page: this drop-down menu can be used to change the number of items that display per page to either 5, 10 or 20.
- Items displayed: in the bottom right-hand corner of the search results grid, the number of items currently displaying and the total number of search results can be seen, for example, 1-10 of 55 items.

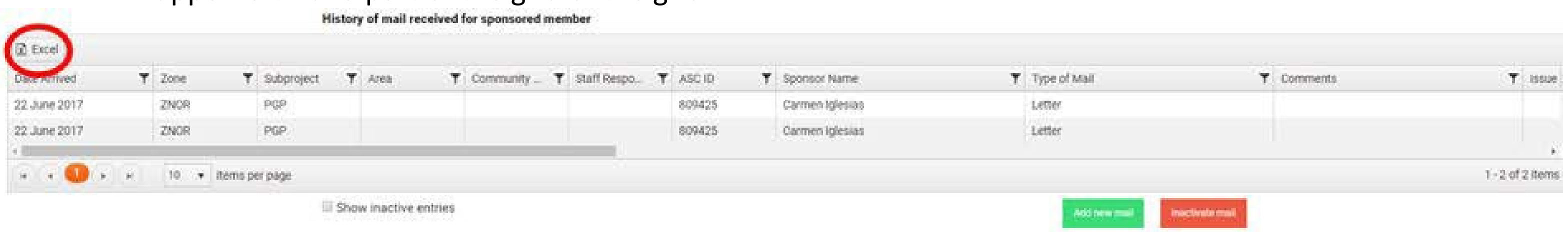
5.7.1 Viewing Inactive Entries

To view mail entries that have been activated, click the “Show inactive entries” checkbox below the mail grid:

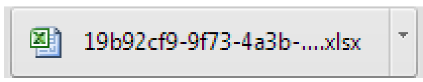


5.7.2 Exporting history of mail received for a sponsored member

To export the history of mail received for a sponsored member, click the export icon on the upper left-hand part of the grid of the grid:



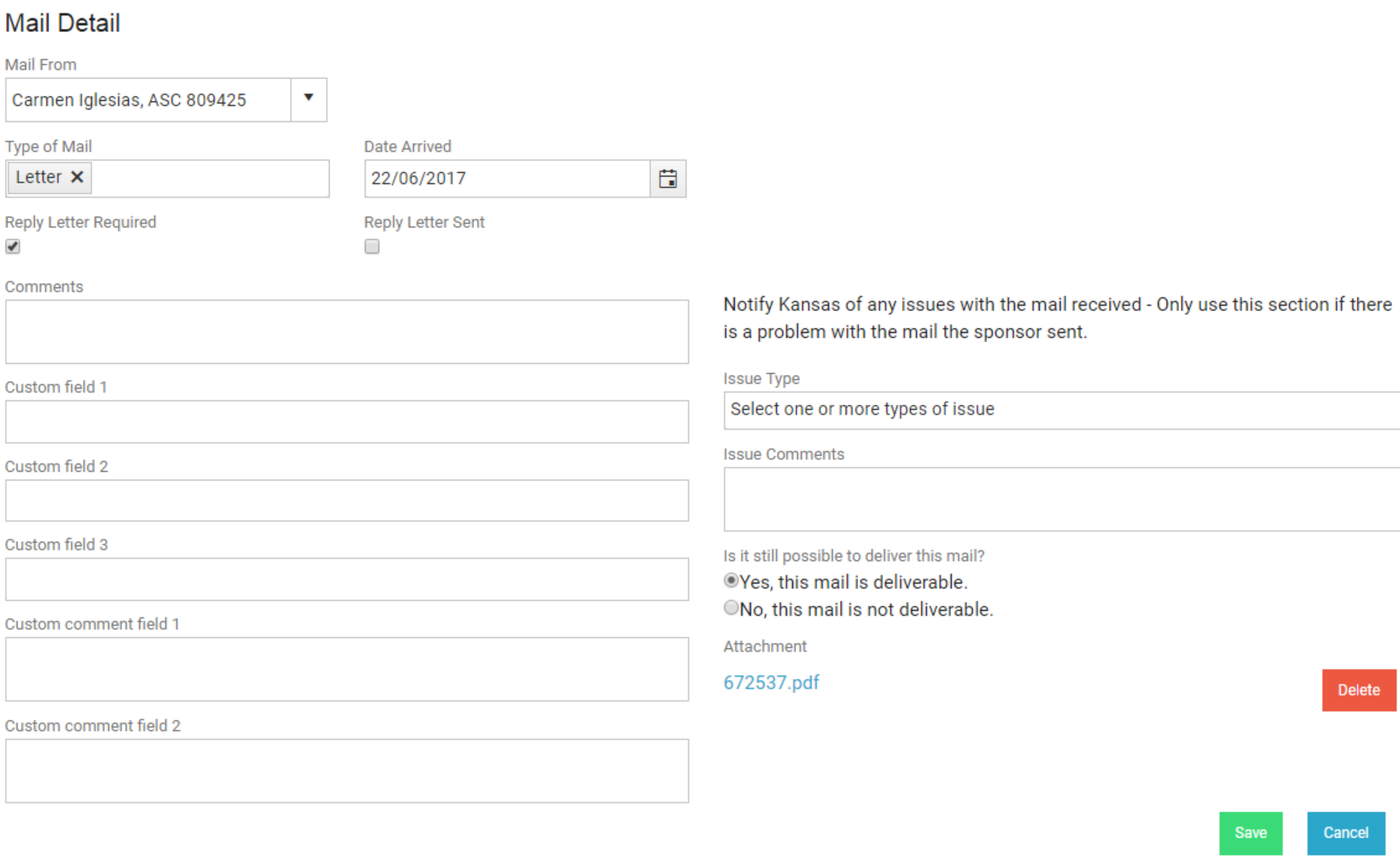
An Excel file will appear in the lower left-hand corner of the screen with the exported information:



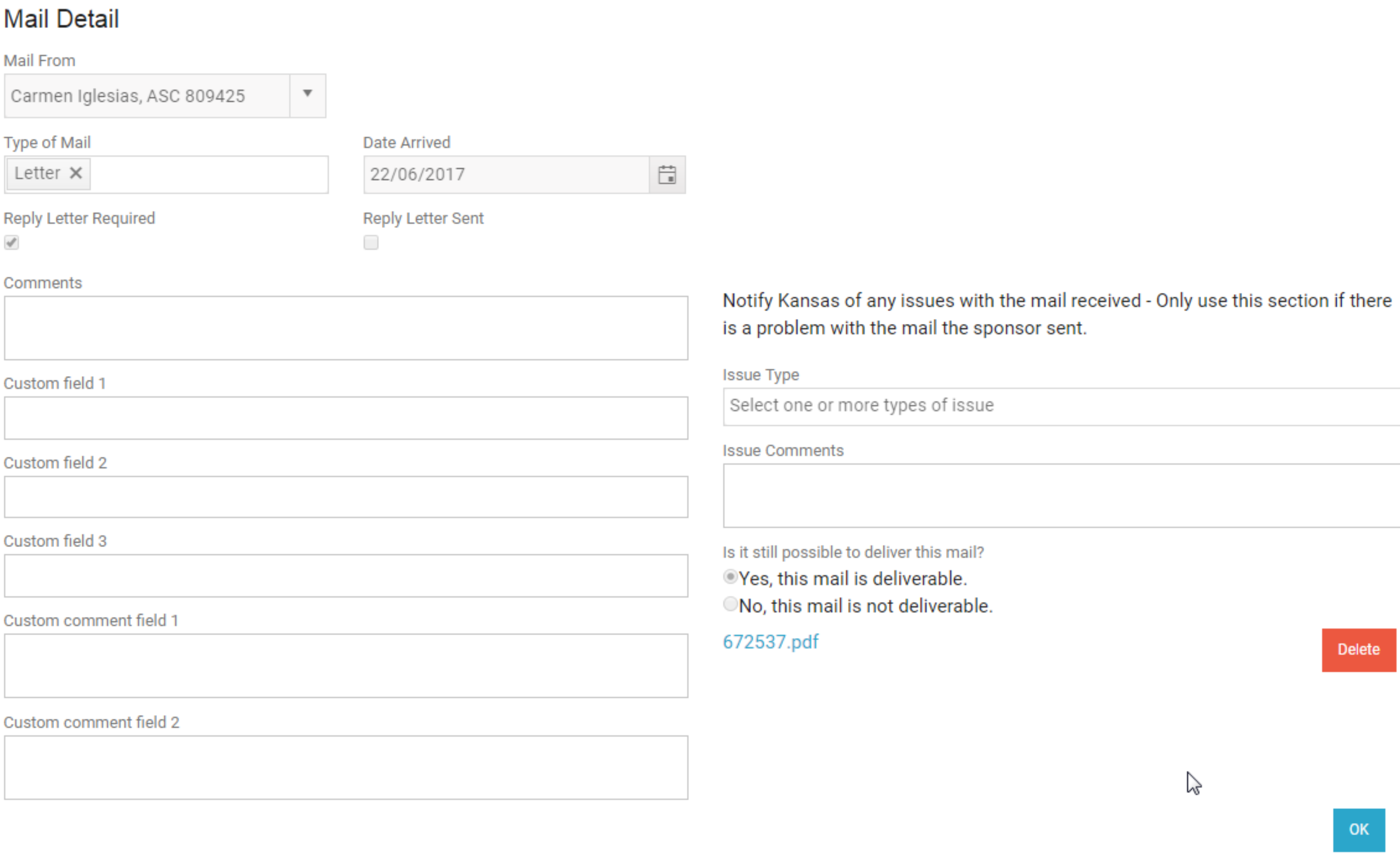
5.8 View Detail and Edit Mail

To view the detail or to edit a mail entry, click on a row on the “History of mail received for sponsored member” grid. The details will appear below the grid.

Correspondence Staff, Coordinators, and Project Admins can edit the mail entry and click Save:

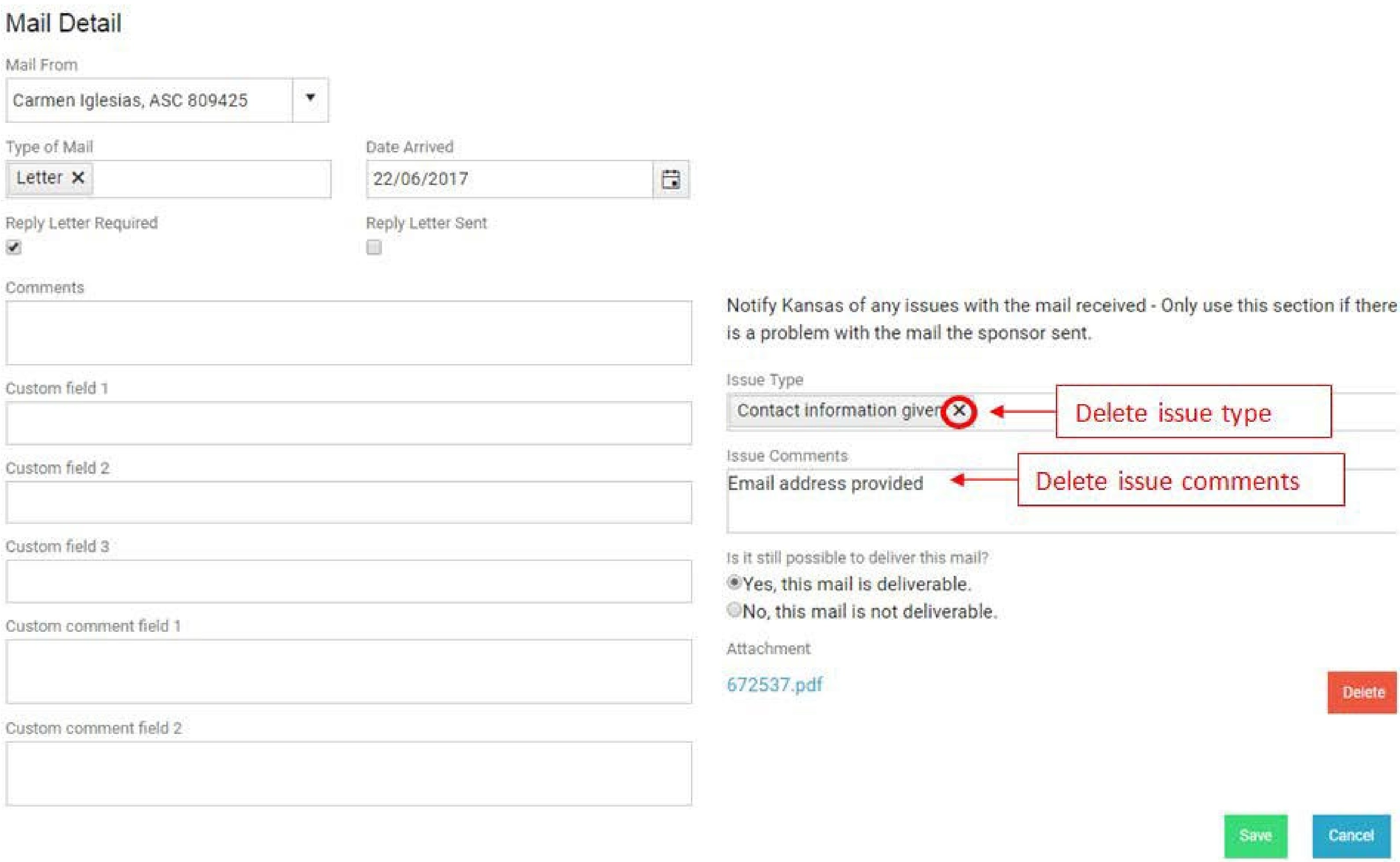


Social workers can view the details of the mail entry but not make changes:



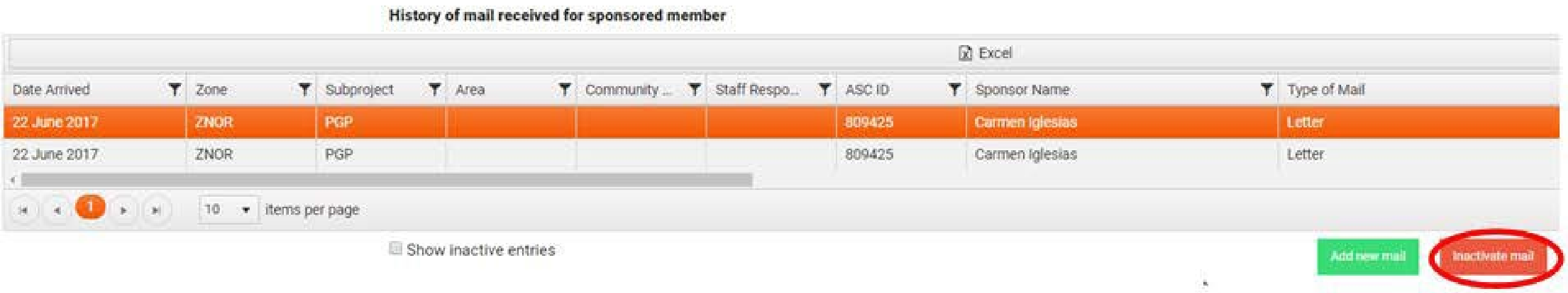
5.8.1 What to do if an issue was selected by mistake

While it is important to only notify Kansas about issues with sponsor mail only when it is appropriate, if an issue is reported by mistake, the issue can be removed while editing the mail entry. The issue comments would also need to be deleted before the mail entry can be saved:

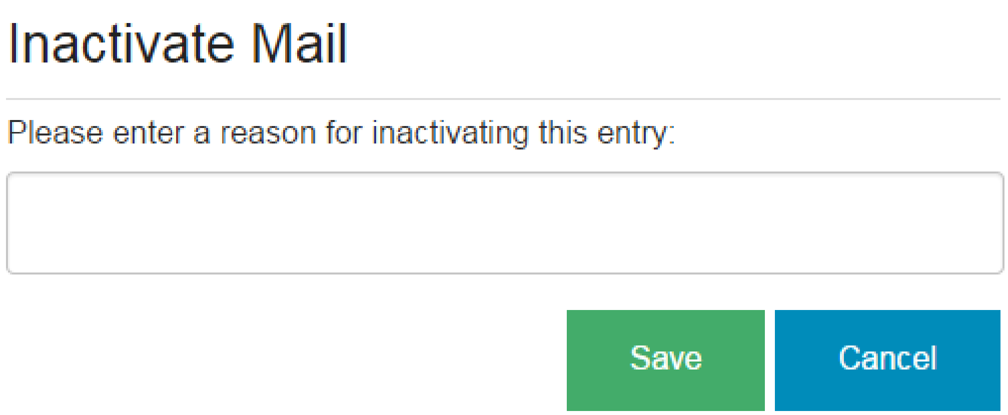


5.9 Inactivating a mail entry

If an entire mail entry needs to be inactivated, for example, if it was logged under the incorrect child or a duplicate entry was made, highlight the entry on the grid and select the "Inactivate mail" button:



You will be required to enter a reason for inactivating the mail entry:



6 eLetters Page

The eLetters page is available to all Portal users. Each user will be able to view and print eLetters from the project, zone(s) and subprojects(s) to which they have access.

The Date Received date range defaults to the last 30 days, but can be changed:

6.1 eLetter Grid

The eLetter grid has the following fields:

- CH ID
- Date Arrived
- Child Name
- Project
- Zone
- Subproject
- Area
- Community Group
- Staff Responsible
- ASC ID
- Sponsor Name
- Reviewed on: if the eLetter has been reviewed, the date on which the eLetter was most recently reviewed
- Reviewed by: if the eLetter has been reviewed, the name of the person that most recently reviewed the eLetter
- Printed On: if the eLetter has already been printed, this shows the date on which it was printed. If it has been printed multiple times, the most recent “printed on” date will appear.
- Printed By: if the eLetter has already been printed, this shows the username of the user that printed it. If it has been printed multiple times, the username of the most recent user to print the eLetter will appear.

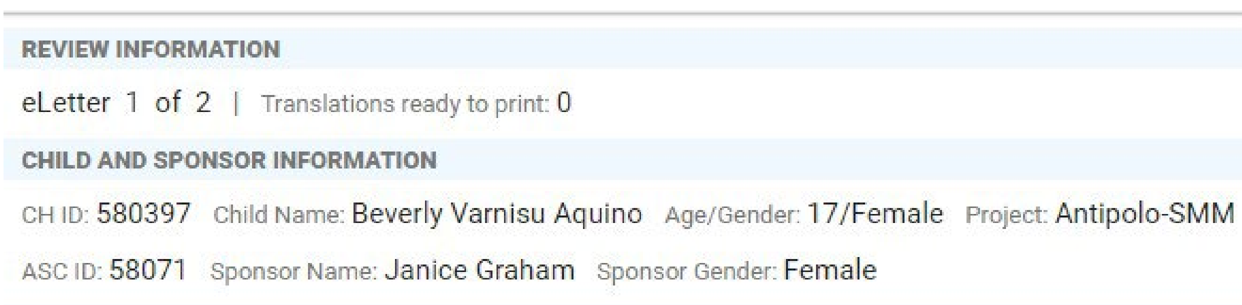
- Delivery date: if delivering the eLetter via mobile phone, the date on which it is scheduled to be delivered or the date on which it was already delivered. eLetters are delivered every hour and will be delivered 24 hours after the Portal user sends them. For example, if the eLetter is sent on 28 September at 10:45 am, the eLetter will be delivered on 29 September at 11 am.
- Communication status: if delivering the eLetter via mobile phone, the status of the communication:
  Status: the status of the communication:
    - Ready to send: once the communication is generated, it will remain in Ready to send status for 24 hours, then it will be sent at the top of the next hour. For example, a message generated on 5 April at 10:17 am will be sent on 6 April at 11 am.
    - Sent: the message has been accepted by the mobile phone company
    - Delivered: the message has been delivered to the mobile phone
    - Read: the message has been read. This status is only available if the mobile phone number is connected to a WhatsApp account
    - Failed: the message could not be sent
    - Undelivered: if the message has not been delivered successfully after 3 days, the status changes to undelivered and Portal will not attempt to send the message again. Portal will also automatically uncheck the "Send communications" checkbox in these cases so the phone number will not be used for future communications unless it is updated.
- Has number to send communications: if this says yes, the sponsored member has a representative on the representative page with a mobile phone number saved and the "Send communications" checkbox selected, which will allow you to send an eLetter to that mobile phone. If this says no, it is not possible to deliver the eLetter via mobile phone. A mobile phone number can be added to the representative's page if possible/desired. If not, the physical eLetter will need to be printed and delivered.
- Smart phone: If this says yes, the sponsored member has a representative on the representative page with a mobile phone number saved, and the "Smart phone" checkbox is selected. If the "Has number to send communications" field also says yes, it is possible to deliver eLetters via smart phone. A link to the eLetter will be sent. The system will first try to deliver the eLetter link via WhatsApp. If the smart phone number does not have a WhatsApp account associated with it, the system will then deliver the eLetter link via text message. eLetter links will include both the text and any photo(s) included in the eLetter. It is not necessary to print and deliver physical eLetters if the eLetter is delivered via smart phone. If the "Smart phone" field says "no" and "Has number to send communications" says "yes," the link to the eLetter will be delivered via text message. It is not possible to open the link on a non-smart phone, but the family may be able to forward the link to a smart phone or open it on another device. If the family is not able to open the link in some way, it will be necessary to print and deliver the physical eLetter.
- Photo(s) with eLetter: if the eLetter contains one or more photos, this field will say "Yes."
- View eLetter: clicking this button will open the eLetter in a separate tab to view it.

- View translation: if an edited version of the eLetter was saved or if the eLetter was translated to a local language, this button displays the edited version/translation in a new tab.
- View changes: this button is used by projects in Latin America.
- Excel button: clicking this button downloads the information in the eLetter grid to an Excel file.

6.2 Reviewing eLetters

To select eLetters to review, highlight one or more rows of eLetters on the eLetter table that have blank “Reviewed on” and “Reviewed by” fields, which means that no one has reviewed those eLetters. It is possible to select multiple eLetters. To select multiple eLetters, you can click one row, then type the Control key and they highlight another row. To select a range of eLetters, click on one row, type the shift key, then click on another row to select the first row, the last row and every row in between. Once you have selected the eLetters you want to review, click on the Review button to open the review screen.

All Portal users have access to review eLetters so it is important to determine who in the project will review eLetters and ask other people not to do this task in Portal or click on the Review button. If a user selects eLetters and clicks Review, there is not a way to cancel the review, only to complete it. The review screen shows the number of eLetters selected to review and which eLetter is currently being reviewed.


REVIEW INFORMATION

eLetter 1 of 2 | Translations ready to print: 0

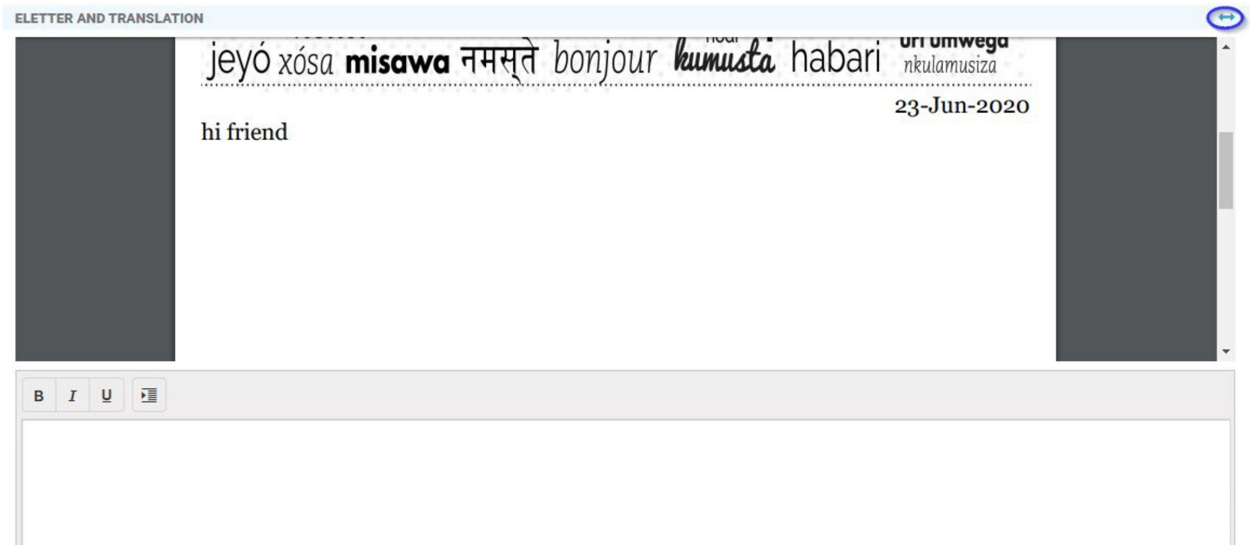
CHILD AND SPONSOR INFORMATION

CH ID: 580397 Child Name: Beverly Varnisu Aquino Age/Gender: 17/Female Project: Antipolo-SMM

ASC ID: 58071 Sponsor Name: Janice Graham Sponsor Gender: Female

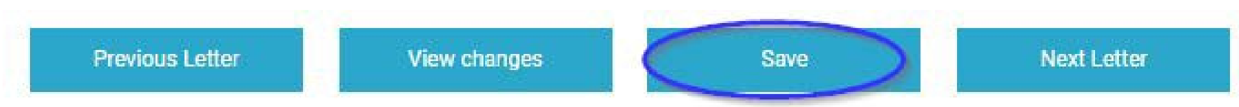
The original eLetter is shown in English and below that is a space to enter an edited English version or to translate to a local language. If the sponsored family reads English and there are no edits needed to the original eLetter, it is fine to leave this space blank and only print and deliver the original eLetter. However, if there is a small problem with the eLetter, such as if the sponsor provides contact information, or if edits would be helpful to explain certain concepts, it is possible to copy the original eLetter text, remove the contact information, and save the edited version. Later, it would be possible only to print and deliver the “translation” or edited eLetter.

The space to translate or edit appears below the original eLetter but if you prefer to see this space beside the original eLetter, click the “Horizontal layout” button:

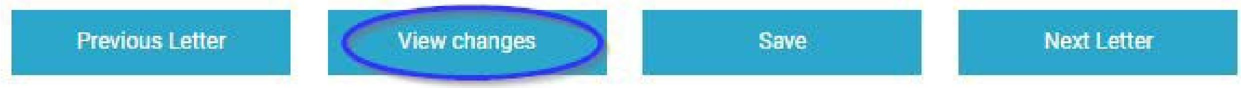


The horizontal layout shows the eLetter and the translation side by side and it is possible to return to the vertical layout by clicking the “Vertical layout” button:

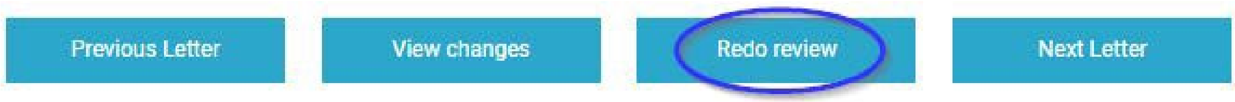
If the reviewer translates or edits the eLetter, it is not necessary to include the date on which the eLetter was written because this is added automatically to the eLetter when it is saved. After completing the edits or the translation, click Save to generate the PDF. Again, if no edits or translations are needed, it is not necessary to enter anything in the text box. Simply save the eLetter without entering any text.



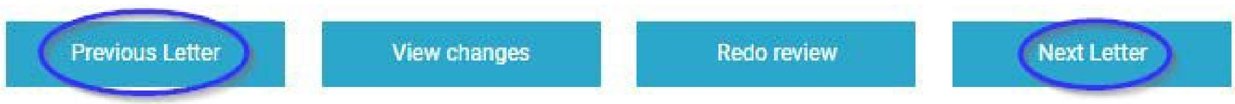
The view changes button is only applicable to projects in Latin America. Those projects use this button when translating eLetters:



If you have saved the edited eLetter or translation and it is necessary to make an additional change, click on "Redo review," make the necessary changes, then save again to generate the PDF again:



You can navigate to the next eLetter or the previous eLetter if you selected more than one eLetter to review:

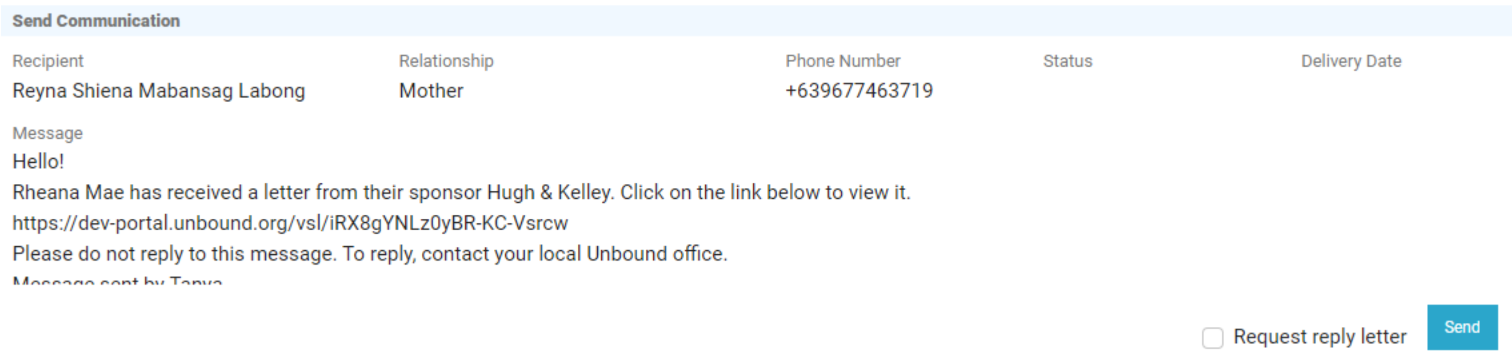


6.2.1 Report an issue with an eLetter

If there is an issue with the content of the eLetter, such as if the sponsor provided contact information or requested to visit the sponsored member outside of the official Unbound procedures, you can notify Kansas of this issue just as you can on the Mail page. Kansas will then contact the sponsor about this issue. If any issue is entered, it is required to enter an issue comment. Any issues entered on the eLetter page will also be recorded automatically on the Mail page. It is also possible to indicate if it is not possible to deliver an eLetter. If an eLetter is marked undeliverable, the eLetter will not be printed or delivered via mobile phone. If there is any technical issue with the eLetter, such as the eLetter does not display, please do not report this as an issue via Portal. Please contact your Project Specialist about any technical issues.

6.2.2 Send Communication via mobile phone

After reviewing the eLetter, entering a translation or edited version if needed, and clicking Save, if the sponsored member has a representative created on the Representatives page with a phone number and the “Send communications” checkbox selected, the Send Communication section will appear on the eLetter review page:



Here, you can see the name of the representative (Recipient), their relationship to the sponsored member, and the phone number from the Representatives page. You can preview the communication that the representative will receive. You will see a link to the eLetter, which will include the text and any photos. The eLetter links will be delivered via WhatsApp if the smart phone number has a WhatsApp account associated with it or via text message if the smart phone number does not have a WhatsApp account. If the representative does not have a smart phone, a link will also be delivered, but the family will not be able to open it on the non- smart phone itself.

If any of the information in the Send Communication section is incorrect, please go to the Representatives page to update and save the information before sending the eLetter, then refresh the eLetter review page to send the communication using the updated information.

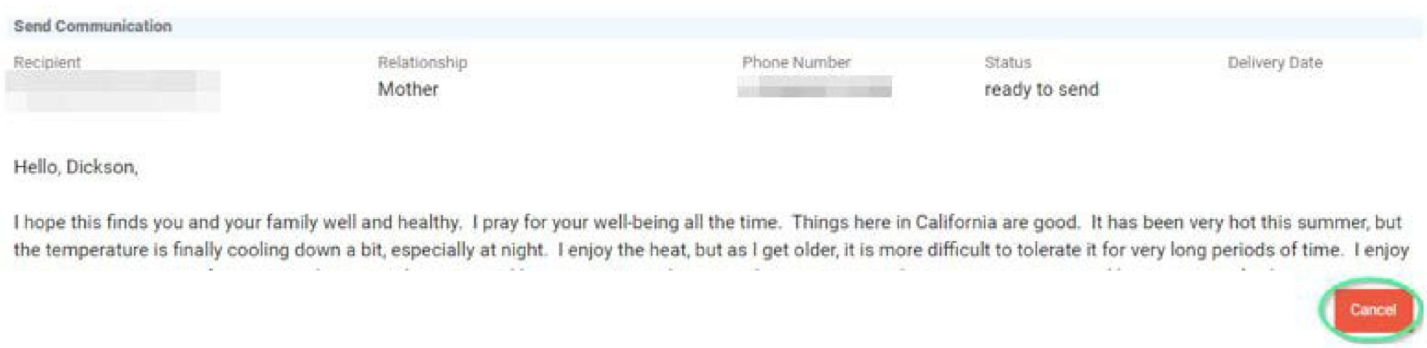
If the Send Communication section does not appear, this means the sponsored member does not have a representative created with a phone number that has “Send Communications” selected. If you want to send the communication via mobile phone, you can go to the Representatives page to update and save this information, then refresh the eLetter review page to view the Send Communication section and send the eLetter.

If the Send Communication section appears and you do not want to send the eLetter via mobile phone for any reason, simply do not click Send in this section. The eLetter can be printed and delivered.

Request reply letter: if this option is selected, the family will receive two separate messages: the first will include the link to the eLetter. The second ask the family to upload a letter. Please see the letter notifications section under the Digital Letters chapter for more information. The project can determine if you want to request a letter written by the family at the same time you send them the eLetter. If you do request a reply letter, this will be logged as a letter notification on the Letter Notifications page on the View Letter Notifications tab. It is not possible to request a reply letter from a CH ID that is not currently sponsored.

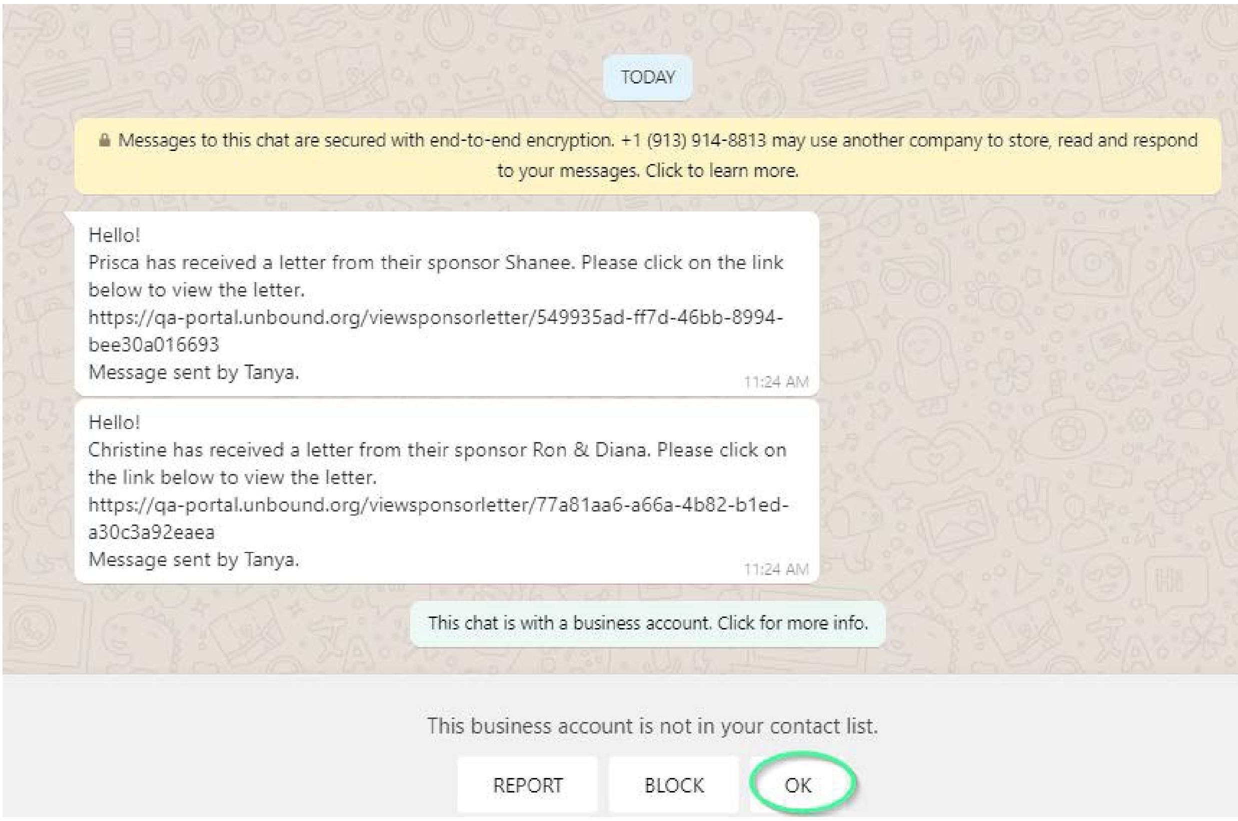
Request reply video: if this option is selected and the sponsor is eligible to receive a video message, the the family will receive two separate messages: the first will include the link to the eLetter. The second ask the family to upload a video. Please see the notifications section under the Digital Letters chapter for more information. The project can determine if you want to request a reply video from the family at the same time you send them the eLetter. If you do request a reply video, this will be logged as a notification on the Letter Notifications page on the View Letter Notifications tab. It is not possible to request a reply video from a CH ID that is not currently sponsored.

Once you have reviewed the information in the Send Communication section, click "Send" to schedule delivery of the eLetter via mobile phone. The eLetter will be send in 24 hours at the next hourly delivery. For example, if you click Send at 3:20 pm on 28 September, the eLetter will be sent at 4:00 pm on 29 September. After clicking Send, the status of the communication will be "Ready to send" until it is delivered.



When families receive eLettters by mobile phone, it is important that they do not respond directly to the messages because no one will receive the response. To send a letter to reply to the sponsor, it is necessary to follow already-established channels, such as sending a typed letter via WhatsApp to the social worker, writing a letter by hand, etc.

The first time a family receives an eLetter via WhatsApp, it is necessary to enable the link to the eLetter by clicking on OK. For subsequent eLetters, it is not necessary to do anything to enable the links.



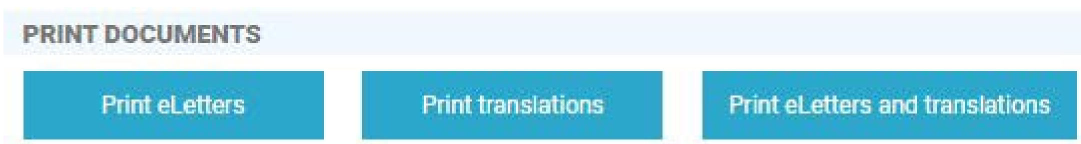
6.2.3 Resend eLetter communications

It is possible to resend an eLetter to a mobile phone if the communication status is undelivered. If Portal has attempted to send the eLetter unsuccessful 3 times, an option to delete the communication will appear on the eLetter review page. Once the communication is deleted, it can be sent again. If the phone number of the representative has been updated, this will reflect when resending the eLetter.

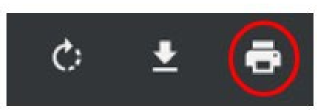
6.2.4 Print eLetters from the Review page

After reviewing all of the selected eLetters, you can now print the eLetters and/or edited versions and translations using the buttons in the “Print documents section.” To print only the eLetters, click “Print eLetters.” To print only the translations or edited versions of the eLetters, click “Print translations.” Translations/edited eLetters will only print for eLetters that had translation/edited text entered. To print the original eLetters and translations/edited eLetters at the same time, click “Print eLetters and translations.” Using this third button, “Print eLetters and translations,” the eLetter and translation of each sponsored member will print together, meaning the first document that will print is the eLetter of sponsored member 1, the second document that will print is the translation of sponsored member 1, the third document that will print is the eLetter of sponsored member 2, and the fourth document that will print is the translation of sponsored member 2 so it is not necessary to match the documents later.

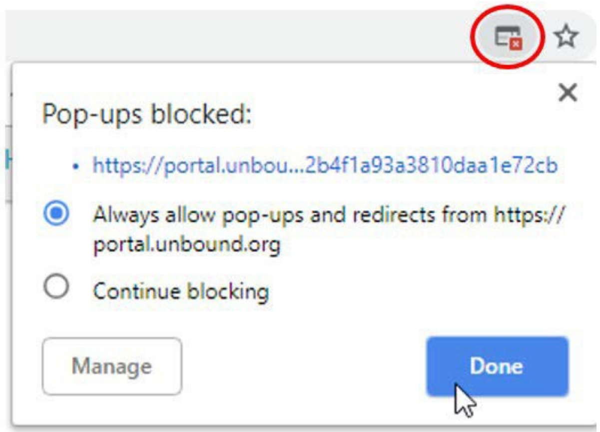
If the eLetter was marked as undeliverable, the eLetter will not be printed.



The eLetters and/or translations that to print will appear in a combined document in a new tab. You can print them by selecting the print icon:



The first time that you print from your computer, it is possible that you will see a message that says pop-ups were blocked. Select the first option, “Always allow pop-ups from Portal” and then click Done.



Refresh the page and click print again.

After printing the documents, click on "Complete review" to mark the eLetters as reviewed and to return to the main eLetter page. It is not possible to exit the review page and view the main eLetter page without clicking on this button:

Now on the main eLetter page, we can see that the eLetters have been reviewed:

Excel

CH ID	ASC ID	Sponsor Name	Reviewed On	Reviewed By
580397	58071	Janice Graham	25 June 2020	Joyce V. Brinkmann
580397	58071	Janice Graham	25 June 2020	Joyce V. Brinkmann

6.3 Print eLetters and translations:

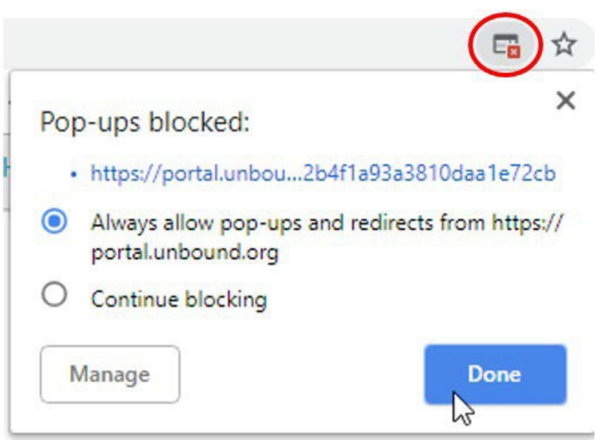
In addition to printing eLetters and translations from the review page, it is also possible to print them from the main eLetter page.

To print eLetters and/or translations, highlight one or more rows of eLetters in the grid. Multiple eLetters can be selected. To select multiple rows, you can click one row, then type the control key, then highlight one or more other rows. To select a range of eLetters, click one row, type the shift key, then click another row to highlight the first row, the last row selected and every row in between.

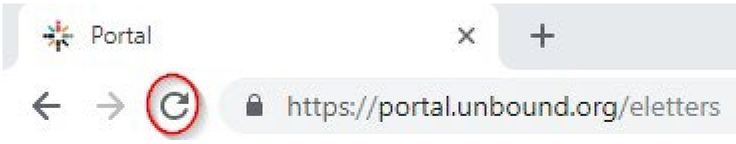
Once you have selected the desired eLetter(s), to print only the eLetters, click the “Print eLetters” button. To print only the translations or edited eLetters, click “Print translations.” To print eLetters and translations at the same time, click “Print eLetters and translations.” Using this third button, “Print eLetters and translations,” the eLetter and translation of each sponsored member will print together, meaning the first document that will print is the eLetter of sponsored member 1, the second document that will print is the translation of sponsored member 1, the third document that will print is the eLetter of sponsored member 2, and the fourth document that will print is the translation of sponsored member 2 so it is not necessary to match the documents later.

If any eLetter was marked as undeliverable, it will not print.

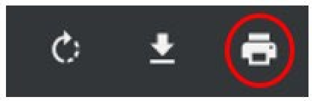
x icon in the upper right-hand corner of Google Chrome to allow pop-ups from Portal. Then choose the “Always allow pop-ups and redirects from https://portal.unbound.org option and click Done.



You will then need to refresh the page and click the Print eLetters button again.



The selected eLetters will open in one combined file in a new tab. They can then be printed from the browser by selecting the print icon:



7 Digital Letters Page

The Digital Letters page is used to create and review regular, welcome, acknowledgement and farewell letters to be reviewed and sent to Kansas. Regular and welcome video messages are also uploaded and reviewed here. All roles in Portal have access to this page.

7.1 Letter Scanning Process

Please note the following requirements when scanning letters:

- Up to 30 letters of the same type (regular, welcome, farewell or acknowledgement) can be scanned into the same PDF file to upload to Portal. It is preferable to create larger batches of up to 30 letters to be able to process the letters faster in Kansas. It is not necessary to separate letters by subproject, only by letter type.
- Scans should be high quality (approximately 300 dpi) and must be in color.
- A barcode label should be placed in the upper right-hand corner of the first page of each letter.
- Do not fold letters at any point before scanning them because the creases can be seen on the scanned images of the letters.
- If any letter needs an English translation and the letter batch will not be translated in the Translation Module, the English translation should be included as additional pages of the letter of that sponsored member and scanned.
- Do not include more than one letter from the same sponsored member in the same batch, as only one letter per sponsored member can be recognized by Portal within the same batch.
- If sponsored members write on one side of the page, set the scanner to scan one side of the page only. If they write on both sides of the paper, set the scanner to scan both sides of the page.

Once you have scanned up to 30 letters and saved the PDF document, check to make sure all pages were scanned and that there are no blank pages. A PDF editor such as Adobe Acrobat Pro can be used to remove blank pages. The PDF documents can be named according to the preference of your project, but you may find it helpful to include the letter type, the date, and the project/zone/subproject. Each PDF document must have a unique name.

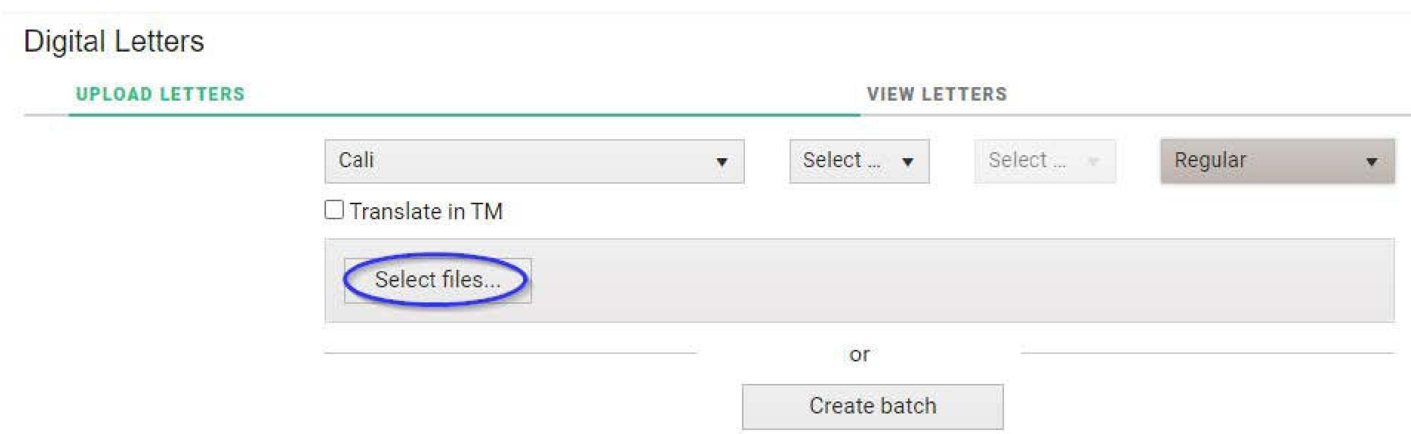
7.2 Upload Tab

The Upload tab is used to upload the PDF documents that contain letters from one or more sponsored members. It can also be used to create batches of typed letters, for which it is not necessary to scan letters. It is also used to upload video messages. Your project, zone and/or subproject will be selected for you according to your access. Letter and video batches can be created at the project, zone or subproject level. However, batches created at the project level will not be visible to Portal users who only have access to a zone or subproject on the Digital Letters page. Zone and subproject users would be able to see letters and videos from batches created at the project level on the Mail page and the letter and video reports. It is required to select a type, either Regular, Welcome, Farewell or Acknowledgement

If your project uses the Translation Module (TM) to translate letters and videos from sponsored members, you will see a checkbox that can be checked to indicate that a batch should be sent to the Translation Module. For some projects, "Translate in TM" is automatically checked if your project translates most letters and videos in the TM, but this can be unchecked if certain letters and videos should not be sent to the TM.

7.2.1 Uploading scanned letters:

Once you have selected the correct project, zone and/or subproject, the letter type and checked/unchecked Translate in TM (if applicable to your project), click the Select files button to select the PDF document(s) of scanned letters.



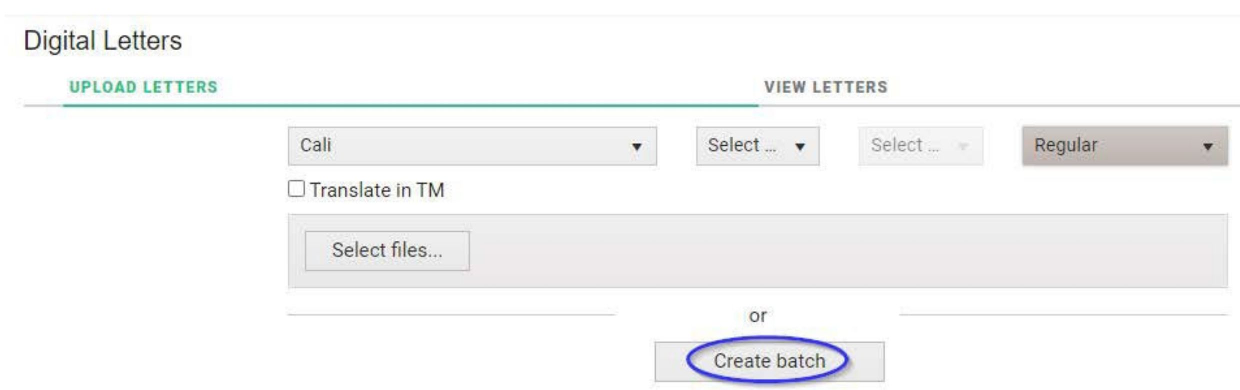
Once you have selected the correct PDF file(s), click Upload to upload them to Portal, or Clear to remove a file if one was selected by mistake.

Once a PDF file is uploaded, the batch will appear in the Batches recently uploaded grid, and Portal will analyze the file to separate it into individual PDFs for each letter using the information from each barcode label. This process will take 2-3 minutes. Portal will also use the barcode information to check for valid letters. Letters will be automatically declined for the following reasons:

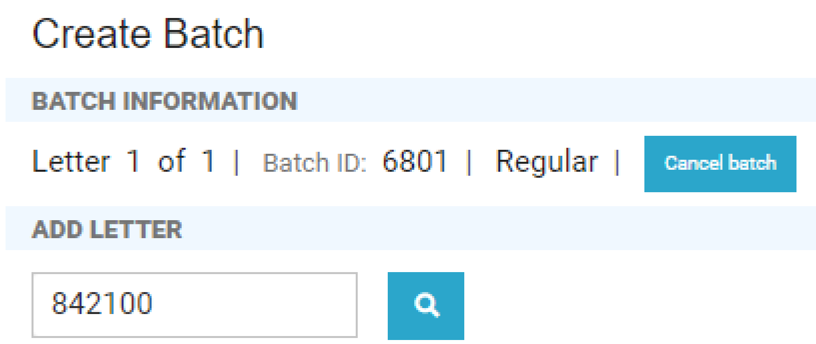
- The sponsor with the ASC ID on the barcode label is no longer the current sponsor of the sponsored member
- The sponsored member is in change of sponsor status
- The sponsored member is retired and the letter uploaded was a Regular or Welcome letter
- The sponsored member has not yet had a welcome letter credited, and a regular letter is uploaded
- The sponsored member has already had a welcome letter credited, and a welcome letter is uploaded
- One or more letters uploaded do not belong to the project selected

7.2.2 Create a batch of typed letters

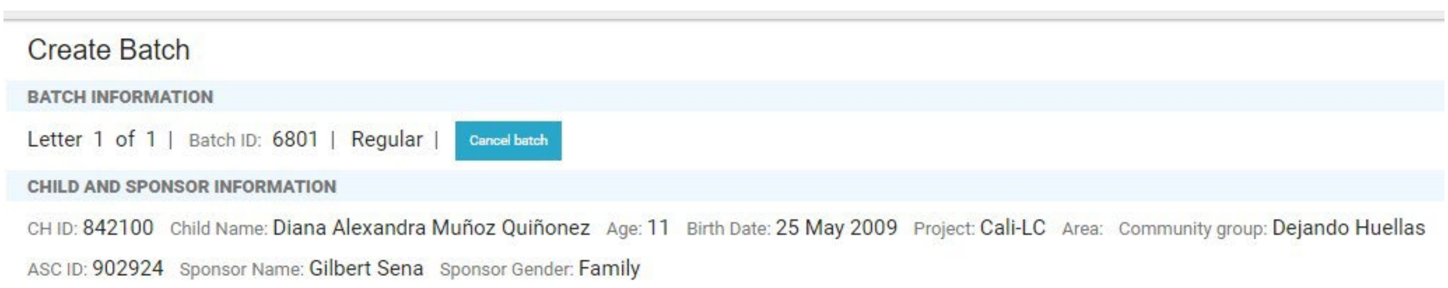
If you do not have physical letters but instead have text of a letter that a family has sent you digitally, or if you have a transcript of a conversation with a sponsored family, to create a letter with this information, select the appropriate project/zone/sub, letter type and select Translate in TM if appropriate. Then select the Create batch button to open the Create batch screen:



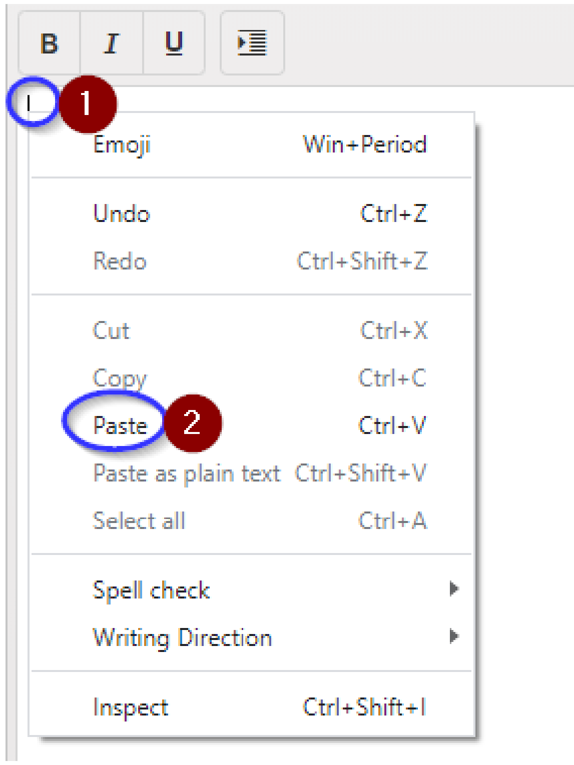
- Enter CH ID: Type the CH ID of the first sponsored member for whom you want to create a typed letter in the CH ID field:



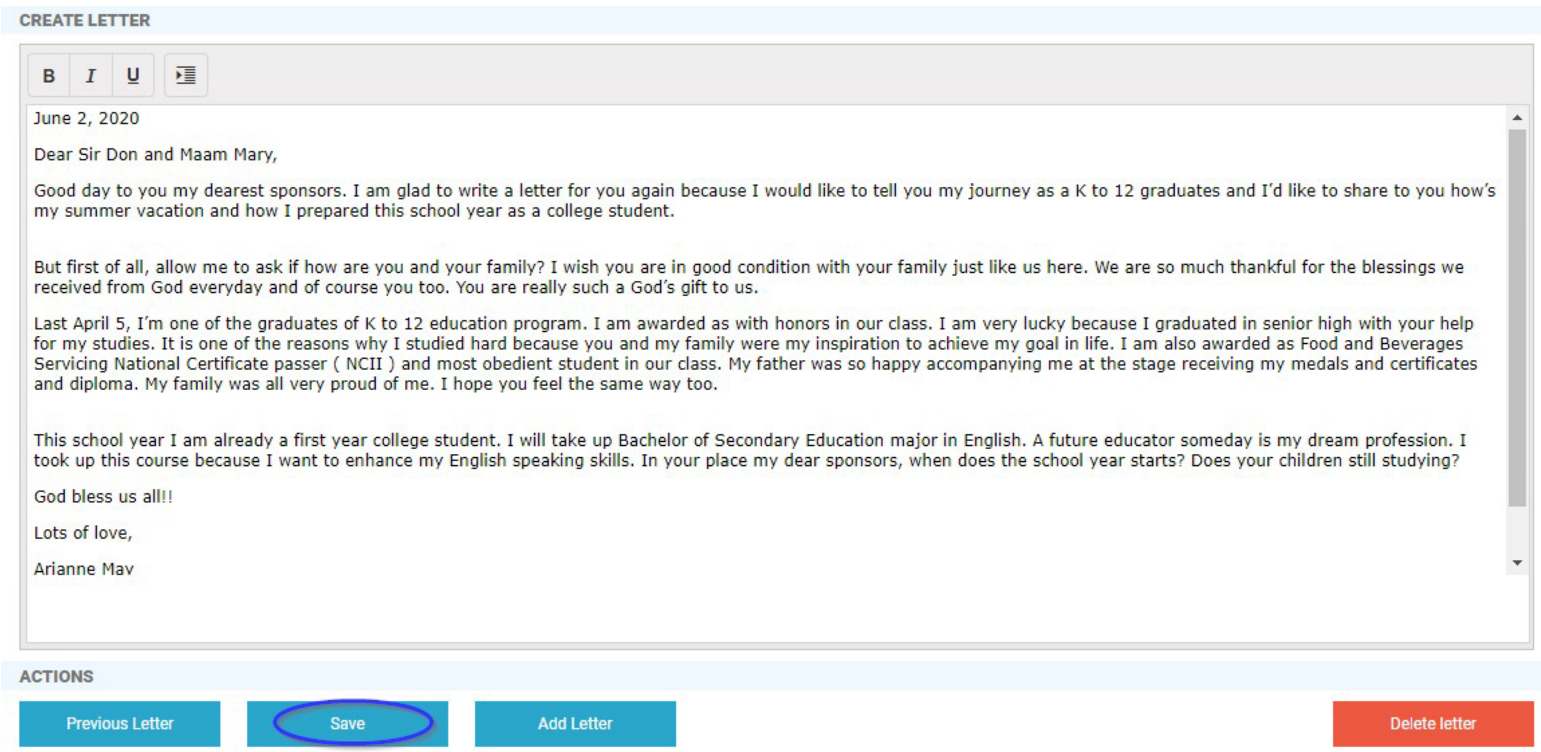
- Display and verify sponsored member and sponsor information: Type Enter or click the search icon to display the information of the sponsored member and their sponsor. It is important to review that the CH ID is correct and that the names of the sponsored member and sponsor match the names on the text of the letter. If the CH ID was typed incorrectly or if the sponsored member wrote the letter to a different sponsor than the one on the Portal screen, the letter can be deleted. If the CH ID is incorrect and the letter is still created, the correct CH ID will not receive credit for the letter and the incorrect sponsor will receive the letter.



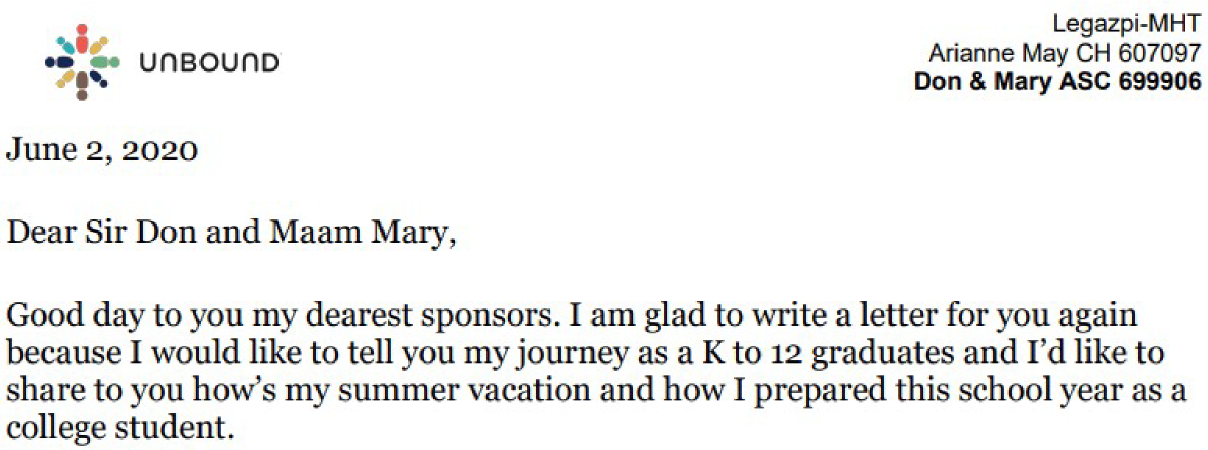
- Enter letter text: After verifying the CH ID and the names on the letter match the names on the Portal screen, copy and paste the text of the letter from WhatsApp, Facebook Messenger, etc., to the Create Letter text box in Portal. Desktop and web versions of WhatsApp and Facebook Messenger are available that may make it easier to copy and paste information to Portal. To paste text, type Control + V after copying the text or right click exactly on the cursor in the text box to see the Paste option:



Make sure the letter is formatted with appropriate spacing, then click Save:



A PDF file of the letter is generated. A header is automatically added that includes the Unbound logo, the Project, Subproject, name of the sponsored member, CH ID, name(s) of the sponsor(s) and the sponsor ASC ID. It is not necessary to include a barcode label with typed letters because the sponsored member and sponsor are identified in the system by typing the CH ID.



UNBOUND

Legazpi-MHT
Arianne May CH 607097
Don & Mary ASC 699906

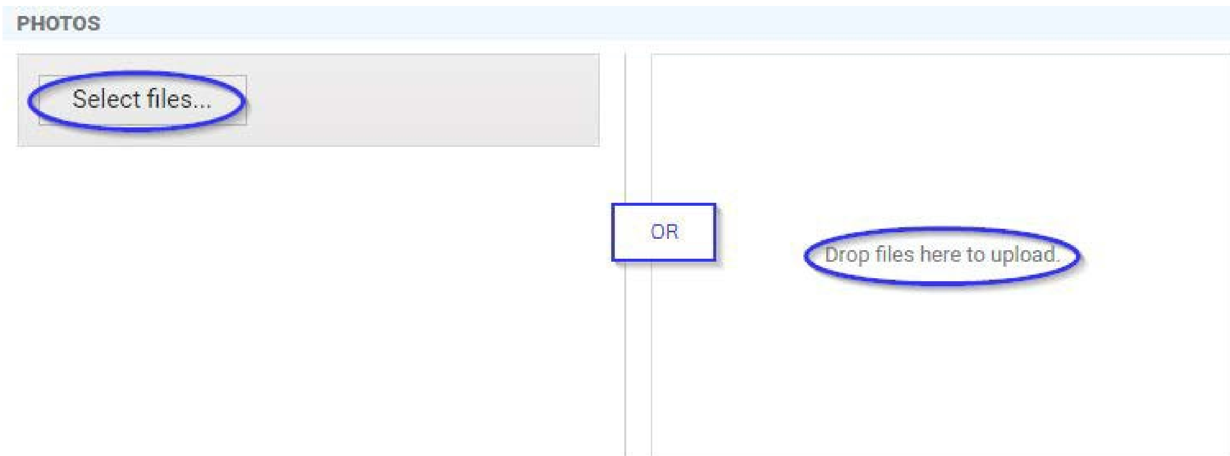
June 2, 2020

Dear Sir Don and Maam Mary,

Good day to you my dearest sponsors. I am glad to write a letter for you again because I would like to tell you my journey as a K to 12 graduates and I'd like to share to you how's my summer vacation and how I prepared this school year as a college student.

- Edit letter: If you need to make any changes to the letter, you can click the Edit Letter button, make the changes, and save the letter again to regenerate the PDF:

- Attach photos(s): It is highly encouraged to include at least one photo with a typed letter. Up to four photos can be added. Since the typed letter is not handwritten, the photo(s) add a personal touch that would typically be provided via the handwriting. Photos allow sponsors to see part of the personal life of the sponsored member. Ideally at least one photo will include the sponsored member, but it is also possible to share photos of the family, pets, etc. To attach photo(s), click the Select files button to navigate to the location of the photos on your computer, or drag and drop a photo to the "Drop files here to upload" area:

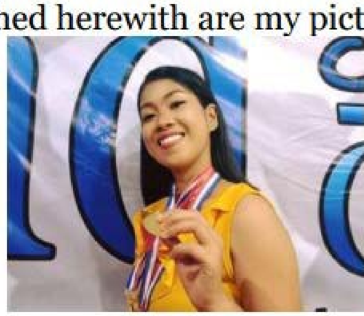


When using the drag and drop option, it is recommended to drag and drop one photo at a time, then to upload the photo. To add additional photos, drag and drop another photo, then upload it. Dragging, dropping and uploading multiple photos at once sometimes results in not all photos being attached to the letter. After uploading each photo, the PDF of the letter is regenerated and the photo is added to the end of the PDF. Depending on the length of the letter, sometimes the photo is added to the end of a page with text, and sometimes a new page is added with only the photo(s):

UNBOUND

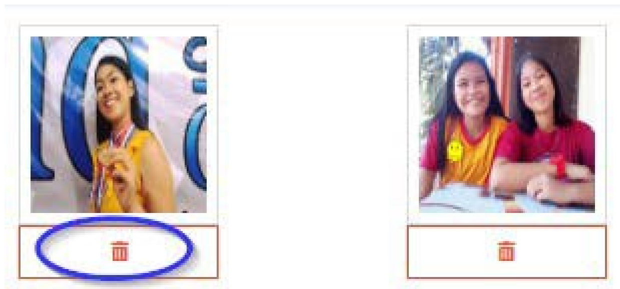
Legazpi-MHT
Arianne May CH 607097
Don & Mary ASC 699906

Attached herewith are my pictures during my senior high school graduation



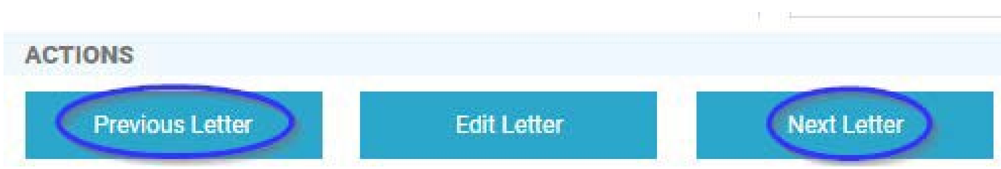
Sometimes when dragging and dropping a photo, it is possible to miss the space that says "Drop files here to upload," and the photo is opened up in the browser. This is a function of Google Chrome that cannot be changed. If this happens, click the back arrow on the browser, refresh the page, then navigate back to the letter on which you were working. It will be necessary to upload or drag and drop the photo again.

- Delete photo(s): to delete one or more photos from a letter, click the trashcan icon under the photo(s):

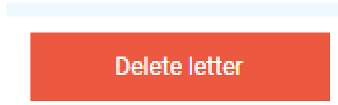


- Add additional letters: After the letter and photo(s) have been created, click Add Letter to add another letter to the batch:

- Navigate to different letters in a batch: It is possible to navigate to different letters in the batch using the Previous Letter and Next Letter buttons:

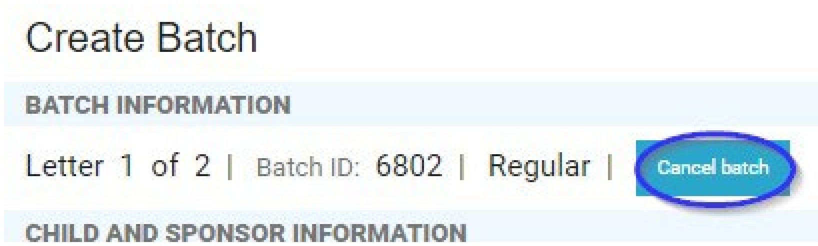


- Delete letter: If a letter was added to a batch by mistake, click the Delete letter button to delete it from the batch:



A message will appear asking you to confirm that you want to delete the letter.

- Cancel batch: If a batch is no longer needed or was created in error, click the Cancel batch button to cancel the batch. The batch will appear in Deleted status on the Batches Recently Uploaded grid.



A message will appear asking you to confirm that you want to cancel the batch.

- Finish batch: After adding up to 30 letters to the batch and ensuring the CH IDs and sponsors are correct, the formatting is correct and adding photo(s) if possible, click Finish to create the batch. It will appear in Pending Review status on the Batches Recently Uploaded grid.

- Upon clicking Finish, Portal checks for multiple letters from the same CH ID in the batch. If multiple letters from one CH ID are found, it is necessary to delete one of the duplicate letters before it is possible to finalize the batch. Sometimes more than one letter from the same CH ID is saved if the internet connection is interrupted while saving a letter. If this happens, the PDF of the duplicate letter will display an error that says, “Blob not found.” Delete this letter with the error in the PDF and click “Finish batch” again to proceed.

7.2.3 Create Batch of Videos

To create a batch of videos, select the project, zone, and/or sub and the type (welcome or regular). Check the Video checkbox to indicate that the file(s) uploaded will be videos and not letters. If your project uses the Translation Module, select the "Translate in the TM" checkbox if the videos should be translated in the TM. Click Select file to select up to 10 .mp4 video files to upload. It is also possible to drag and drop video files from another location on your computer. Each .mp4 file must be named with the CH ID of the sponsored member in the video. Each video should be no longer than 3 minutes and each file be 100 MB or less. Click Upload to upload the selected files, which will be added to one batch, which will now display on the Batches recently uploaded grid.

7.2.4 Batches Recently Uploaded grid

The Batches recently uploaded grid shows all batches uploaded within the last 60 days. The grid has the following columns:

- Digital Child Letter Batch ID: the unique ID assigned to each digital letter or video batch when it is created
- File Name: the name of the PDF file that was uploaded, if applicable
- Project: the name of the project to which the batch was uploaded
- Zone: the name of the zone to which the batch was uploaded, if one was selected
- Subproject: the name of the subproject to which the batch was uploaded, if one was selected:
- Type: the letter type of the batch, either Regular, Welcome, Farewell or Acknowledgement. Farewell letters will be automatically attached to the exit pages of the CH IDs with letters in a farewell batch. Acknowledgement Letters respond to Acknowledgement Letter requests on the Communication page.
- Media Type: Letter or Video
- Staff Responsible: typed letters or videos submitted from mobile phones will be divided into batches according to the staff responsible on the family record, if one is assigned.
- Batch Status:
  - Uploaded: the batch has been uploaded but has not yet been analyzed by Portal and separated into individual PDF files.
  - Extracting: the batch is in the process of being analyzed by Portal and being separated into individual PDF files per letter.
  - Pending Review: The batch is awaiting review by the project.
  - Sent to TM: if your project uses the Translation Module and “Translate in the TM” was selected when the batch was uploaded, this status indicates that the letters or videos in the batch have been reviewed, and the approved letters or videos have been sent to the TM for translation.
  - Submitted to Kansas: the batch has been reviewed by the project, and the approved letters or videos have been sent to Kansas to be credited, printed and sent to sponsors. Declined letters or videos have not been sent to Kansas but appear on the Letters and Videos Declined report for follow-up
  - Ready to Print: the letter batch has been processed and credited in Kansas but the letters still need to be printed to send to sponsors

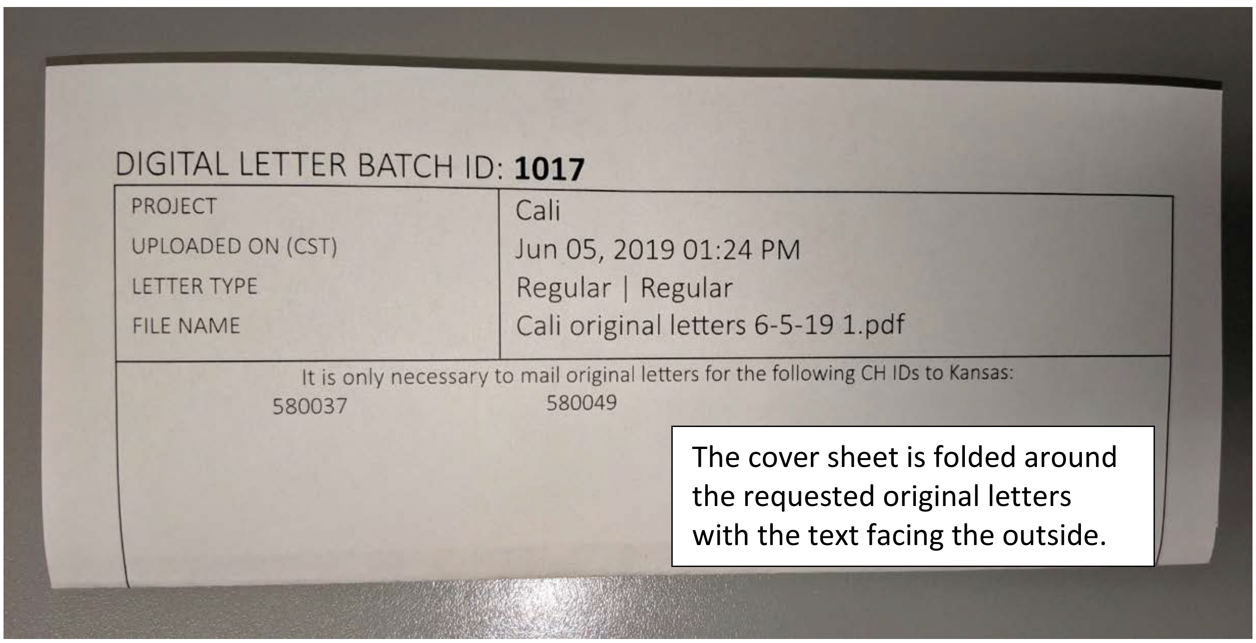
- Processed: the batch has been processed in Kansas and the letters or videos have been credited
  - Deleted: the batch was deleted by a user
  - Error: Portal was unable to read the barcodes on the labels. It may be possible to scan the letters with a higher resolution to resolve this, or better quality labels may need to be printed.
- Translate in TM: if your project uses the Translation Module for translations, and the “Translate in TM” checkbox was selected when uploading the batch, this column will say Yes. Otherwise, it will say No.
- Translation Batch ID: the unique ID assigned to the Translation Module batch, if applicable
- Translation priority: the priority of the batch in the Translation Module, if applicable
- Translation Batch Status: the status of the batch in the Translation Module, if applicable
- Uploaded On: the date on which the batch was uploaded
- Uploaded By: the username of the user that uploaded the batch. If a batch has letters or videos uploaded from the mobile phones of sponsored families, the user will be “Portal”
- Claimed on: If the batch is currently claimed for review, the date on which the batch was claimed
- Claimed by: if the batch is currently claimed for review, the username of the user who has claimed the batch.
- Number in Batch: the total number of letters or videos included in the batch.
- Number approved: the number of letters or videos in the batch that were approved.

The following features of the grid are also available:

- Refresh icon: when a letter batch is first uploaded, it will have the status of Uploaded. In order to update the status of the batch in the grid, click the Refresh icon:
- Excel: click this button to download the details of the batches recently uploaded to an Excel spreadsheet
- Sort: the information in the grid can be sorted by any column in ascending order by clicking once on the column header and in descending order by clicking again on the column header
- Filter: the information in the grid can be filtered by any column by clicking on the Filter icon at the top of a column and using the filter options available. The selected filter can be cleared by clicking again on the column and clicking on the Clear button
- Page arrows: these can be used to navigate to the next, last, previous or first page of information in the grid
- Items per page: this drop-down menu can be used to display 5, 10, 20 or all results per page of the grid
- Number of items: the number of items currently displayed of the total number of items

in the grid

- Print cover sheet button: some sponsors may request the original letters from their sponsored friends instead of the scanned, printed version. In these cases, the letters will not be credited until the original letter is received in Kansas. These letters will appear on the Original Letters Not Received in Kansas report. If there is a letter in a batch for a sponsor that has requested original letters, after the batch has been reviewed, select the batch in the Batches recently uploaded grid and click the Print cover sheet button. A cover sheet will open in a new tab of Portal that shows the CH ID(s) of the original letters that should be sent to Kansas. Wrap the cover sheet around these letters with the text on the cover sheet facing outwards, as shown below. Send these letters to Kansas with your next packet.



- Review batch button: once the batch is uploaded and the batch status has changed to Pending Review status, it must be reviewed before the letters or videos are sent to Kansas. To review the batch, highlight the batch in the grid and click the Review batch button.
- View detail button: to see the details of the letters in a batch, such as the individual letters or videos in the batch and their statuses, highlight the batch in the grid and click the View detail button.
- Delete button: if a batch was uploaded by mistake or otherwise needs to be deleted, the batch must be in Pending Review status. Highlight the batch in the Batches recently uploaded grid and click the Delete button to change the status to Deleted. Batches created by families cannot be deleted.

7.2.5 Detail Grid

To see the details of the individual letters or videos in a batch, highlight the batch in the Batches recently uploaded grid and click View detail. The detail grid will appear with the following columns of information about each individual letter in the batch. When a batch of physical letters is first uploaded, it is important to verify that all original letters that were scanned in the combined PDF file were created as individual letters by Portal.

- CH ID
- Child Name
- Project
- Zone
- Subproject
- Area
- Community group
- Staff Responsible
- Sponsor ASC ID
- Sponsor Name
- Status:
    - Creating: a batch is in the process of being created. This could be a typed letter batch created by the project, or a batch with letters or videos uploaded by families.
    - Uploaded: the letter or video has been uploaded successfully and is awaiting review
    - Approved: the letter or video has been approved in the review screen
    - Declined: the letter or video has been declined in the review screen or automatically by Portal
    - Ready to Print: the letter has been credited in Kansas and is waiting to be printed to send to the sponsor
    - Do not Print: the letter will not be printed in Kansas because there is not a valid address available for the sponsor or the sponsorship was terminated since the letter was approved
    - Processed: the letter or video has been credited and printed in Kansas or emailed to the sponsor.
- Photo Count: the number of photos included with each typed letter
- Reviewed on: if the letter or video has been reviewed (approved or declined in the review screen), the date on which it was most recently reviewed shows here
- Reviewed by: if the letter or video has been reviewed (approved or declined in the review screen), the

username of the user who most recently reviewed the letter or video shows here

- Declined Reason: if the letter or video was declined, the declined reason selected shows here
- Declined Comment: if a comment was entered when declining a letter or video, the comment shows here
- View letter: opens the PDF of the letter from the sponsored member in another tab
- View translation: the PDF of the translation of the letter if the batch was translated in the Translation Module
- View video: if a batch has videos, this link opens the video in another tab.
- Download video: a hyperlink that opens the video in a new tab. Then, click the ellipsis to see the option to download the video.
- View changes: for letters uploaded by families, this button shows any changes made to the letter in Portal. Added text appears in green. Deleted text appears in red.

The following features of the grid are also available:

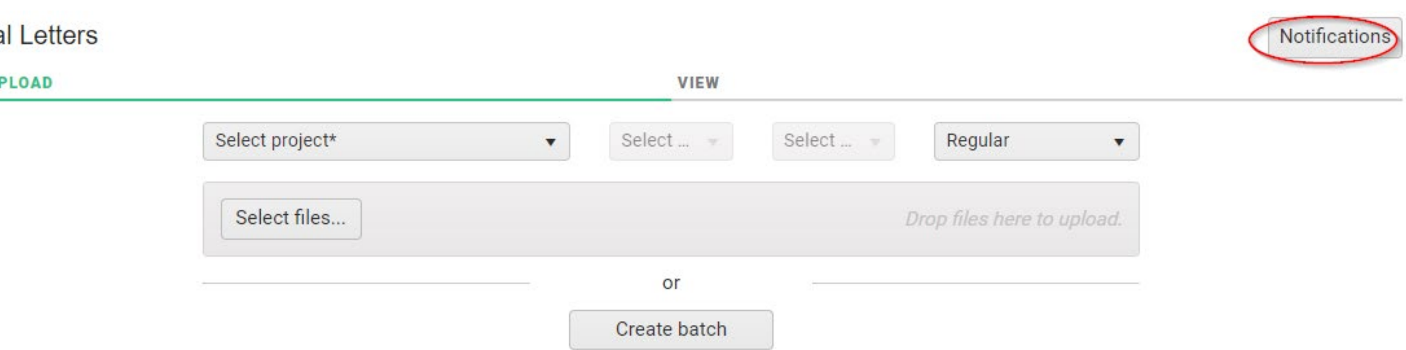
- Excel: click this button to download the details of the batches recently uploaded to an Excel spreadsheet
- Sort: the information in the grid can be sorted by any column in ascending order by clicking once on the column header and in descending order by clicking again on the column header
- Filter: the information in the grid can be filtered by any column by clicking on the Filter icon at the top of a column and using the filter options available. The selected filter can be cleared by clicking again on the column and clicking on the Clear button
- Page arrows: these can be used to navigate to the next, last, previous or first page of information in the grid
- Items per page: this drop-down menu can be used to display 5, 10, 20 or all results per page of the grid
- Number of items: the number of items currently displayed of the total number of items in the grid

7.3 View tab

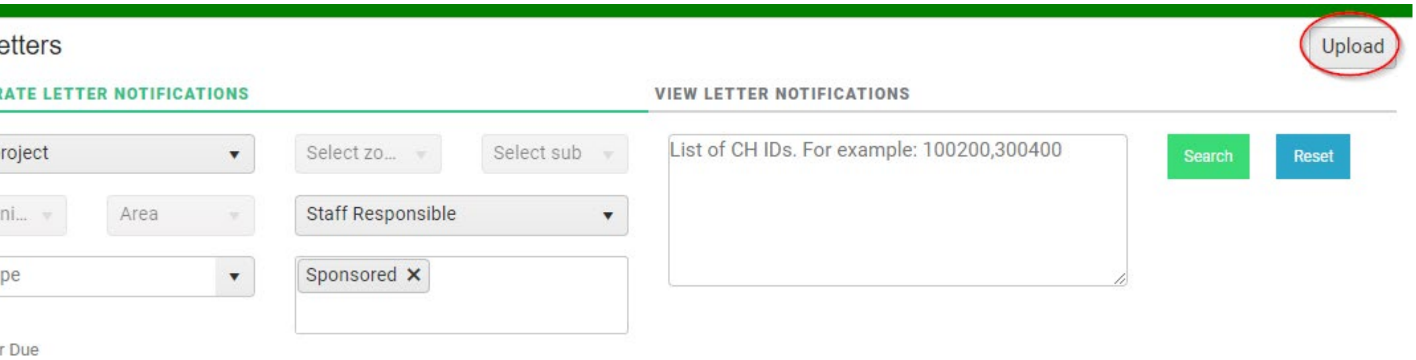
The View tab has almost the same features as the Upload tab. However, it is not possible to upload letters or videos on this tab. On the View tab, there are date filters that can be used to display letters and videos uploaded from a specified date range, while on the Upload tab, letters and videos uploaded in the last 60 days are displayed.

7.4 Notifications

The Notifications page is used to send notifications to the mobile phones of sponsored families to ask them to send a letter or video. Click the Notifications button to go to this page:



To return to the Upload page, click on the Upload Letters button:



7.4.1 Generate Letter Notifications Tab

The Generate Letter Notifications tab is used to search for families to request that they send a letter or video to their sponsor. The following search fields are available:

- Project
- Zone
- Subproject
- Community Group
- Area
- Staff Responsible
- Child Type
- Child Status – the only option available is Sponsored so it is not possible to request a letter from someone who is not currently sponsored
- Next Letter Due date: the default date range will show all sponsored people regardless of when their next letter is due. Use this date range to limit the search results to people with a letter due in the next few months or whatever works best for your project.
- List of CH IDs: to search for a specific CH ID, type the CH ID, for example, 123456 and click Search. To create a list of specific CH IDs, type several CH IDs separated by a comma, for example: 123456,123457,123458 then click Search. If the CH ID(s) belong to a project, zone or subproject to which you have access, it will be added to the results grid. It is not necessary to include a space after the commas, and there should be no comma or space after the last CH ID entered. It is also possible to copy and paste a list of CH IDs from Excel as long as there is a comma after each CH ID. For more information about how to copy and paste a list of CH IDs from Excel, please see this video: https://drive.google.com/file/d/1wZqCtN1r2evzgUdrqpthLL1CI4PvzX3E/view?usp=shari ng
- Search button: view the results that meet the selected search criteria
- Reset button: restore the search filters to their default values

Results grid:

The results grid shows the values that meet the selected search criteria. The following information is available:

- Zone
- Sub
- Area
- Group Name
- Staff Responsible
- Child Type
- CH ID
- Child Name
- Child Status
- Representative
- Phone Number: the phone number listed for the representative on the Representatives page
- Smart Phone: indicates if the phone number belongs to a smart phone, according to what is selected on the Representatives page
- Send communication: if communications from Portal should be sent to the phone number, according to the Representatives page
- Can Sponsor Receive Video: in order to upload a video or send a video notification for a CH ID, their sponsor must be eligible to receive a video to increase the likelihood that we will be able to deliver a video digitally and that the sponsor will watch it. If the sponsor is eligible to receive a video, this field will say Yes. To be eligible to receive a video, the sponsor must:
  - Have a valid email address in the Kansas CASA database
  - Have indicated that they want to receive letters from their sponsored friend via email
  - Be registered on the unbound.org website
  - Have read any digital letters for any of their past or current sponsorships on the website, unless this is their first sponsorship
- ASC ID: the ID of the sponsor. If there is a corresponding sponsor, this is the ID of the corresponding sponsor and not the paying sponsor.
- Sponsor Name: the full name of the sponsor. If there is a corresponding sponsor, this is the ID of the corresponding sponsor and not the paying sponsor.
- Last Letter Received: the date on which the last letter or video from the sponsored member was credited.
- Next Letter Due: the date on which the next letter or video from the sponsored member is due.
- Potential letter communications: the number of letter communications that can potentially be sent. A CH ID may be listed in the results grid, but if a phone number is not available or if the child has already had a notification sent in the last 15 days that does not have a status of "undelivered" and a letter has not yet been received, this will not count as a potential communication.
- Potential video communications: the number of video communications that can potentially be sent. A CH ID may be listed in the results grid, but if a phone number is not available or if the child has already had a notification sent in the last 15 days that does not have a status of "undelivered" and a video has not yet been received, this will not count as a potential communication. The sponsor also must be eligible to receive a video to be able to send a video notification to a family.
- Excel: downloads an Excel file with the search results information
- Remove selected: removes highlighted rows from the grid
- Remove all: removes all rows from the grid.
- Generate Letter Notifications button: generates letter notifications that meet the criteria to send:
  - Sponsored member has a representative with a phone number set to "Send communications"

    - Sponsored member does not already have an existing letter notification that has not yet had a letter uploaded in response to it, if that communication was sent less than 15 days ago.

- Generate Video Notifications button: generates video notifications that meet the criteria to send:
    - Sponsored member has a representative with a phone number set to “Send communications”
    - Sponsored member does not already have an existing video notification that has not yet had a video uploaded in response to it, if that communication was sent less than 15 days ago.
    - Sponsor is eligible to receive a video
- Resending notifications: after sending a letter or video communication, if the status is undelivered or if the first notification was sent more than 15 days ago, it is possible to send another notification.

7.4.2 View Letter Notifications tab

The View Letter Notifications tab is used to view letter and video notifications recently sent to families. The following search filters are available:

- Project
- Zone
- Subproject
- Created Date: the default date range shows letter and video notifications sent in the last 30 days, but the date range can be customized.
- View notifications: displays notifications that meet the selected search criteria
- Reset: restores search filters to their default values

Results grid:

The results grid shows the values that meet the selected search criteria. The following information is available:

- Zone
- Sub
- Area
- Group Name
- Staff Responsible
- CH ID
- Child Name
- One time code: the unique code that the family will use to upload the letter or video
- Representative
- Phone Number
- Smart Phone
- Media type: indicates if the notification sent requested a letter or video
- Message: the message the family receives, which will be sent via text message or WhatsApp, if the smart phone is connected to a WhatsApp account
- Status: the status of the communication:
  - Ready to send: once the communication is generated, it will remain in Ready to send status for 24 hours, then it will be sent at the top of the next hour. For example, a message generated on 5 April at 10:17 am will be sent on 6 April at 11 am.
  - Sent: the message has been accepted by the mobile phone company
  - Delivered: the message has been delivered to the mobile phone
  - Read: the message has been read. This status is only available if the mobile phone number is connected to a WhatsApp account
  - Failed: the message could not be sent.
  - Undelivered: if the message has not been delivered successfully after 3 days, the status changes to undelivered and Portal will not attempt to send the message again. Portal will also automatically uncheck the “Send communications” checkbox in these cases so the phone number will not be used for future communications unless it is updated.
- Delivery Date: the date on which the communication was delivered or scheduled to be delivered
- Created Date
- Created By
- Letter uploaded: indicates if the letter or video has been uploaded using the one-time code
- Batch ID: the ID of the digital letter batch in which the letter or video was uploaded

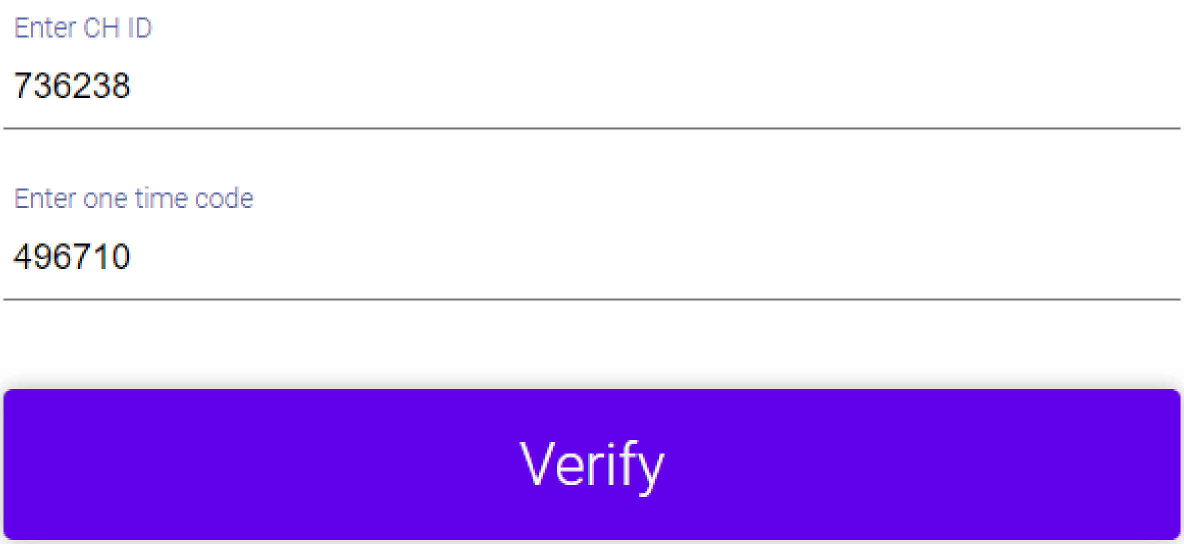
- Excel: downloads an Excel file with the search results information
- Cancel notification: cancels a notification that was previously generated. A communication can be cancelled between the time it is generated up to 3 minutes before it is scheduled to be sent, which is 24 hours after it is generated.

7.4.3 Uploading letters or videos from external website

After using the Notifications page to send letter or video notifications to mobile phones to ask families to upload their own letters or videos, the letters or videos can be uploaded from https://portal.unbound.org/family

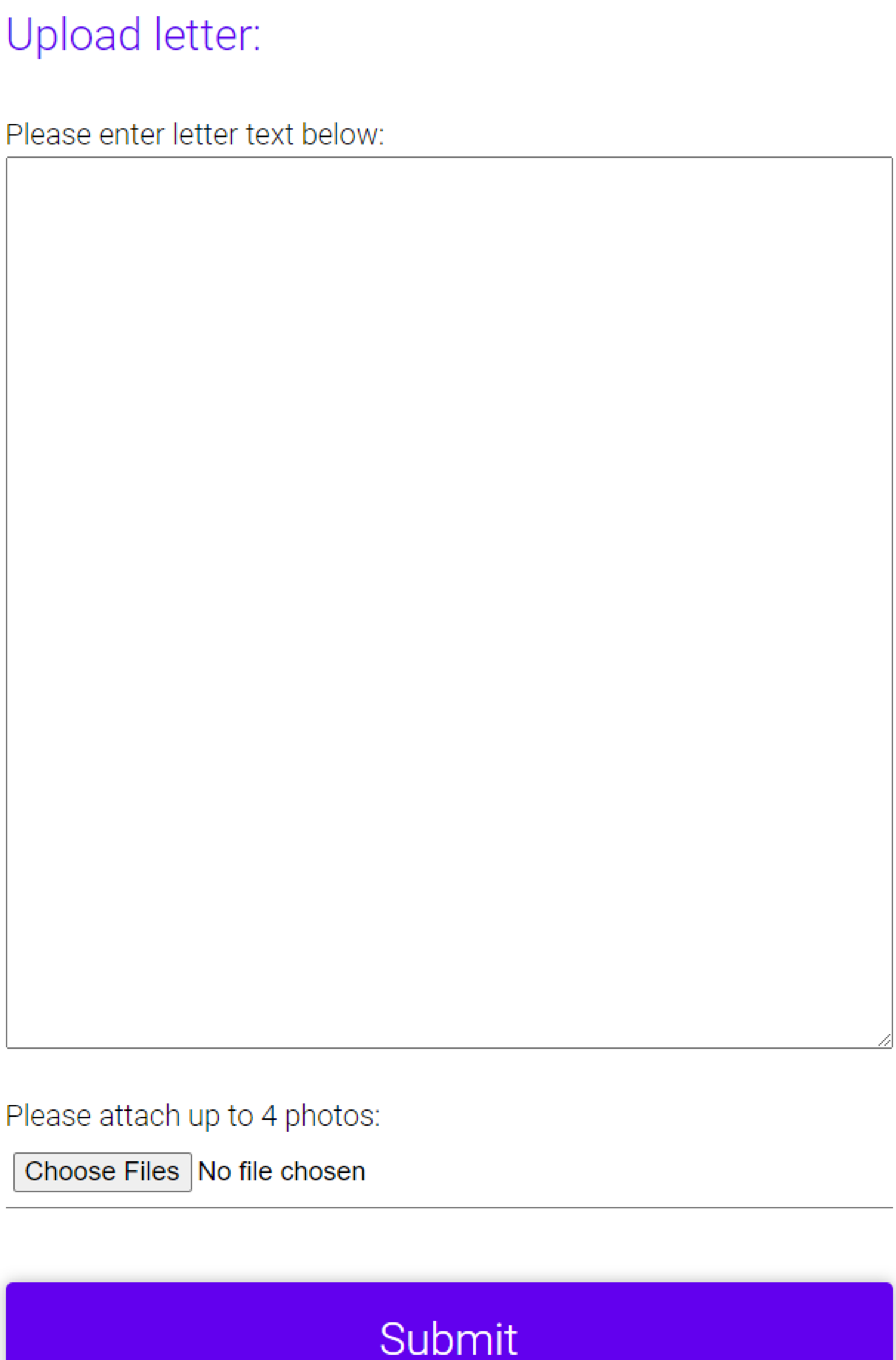
The following fields are required:

- CH ID: the family will need to know their CH ID. It will not be included in the message they receive for security purposes.
- Enter one time code: the family will receive this code in the message they receive. It is also available on the View Letter Notifications page. This is required to prevent malicious, automated programs from uploading files to Unbound systems.
- Verify button: once the family enters their CH ID and unique code, they should click Verify to continue:



7.4.3.1 Uploading a letter

Once Verify is clicked, if the family entered a unique code associated with a letter notification, Portal will display a text box to enter letter text:



Please enter letter text below: the family will type the text of their letter in this text box, following standard letter guidelines, such as typing the date, greeting the sponsor by name, sharing updates about their life, etc.

Please attach up to 4 photos. Choose Files: The family can select 1-4 .jpg or .jpeg files from their smart phone or computer. Each photo has a size limit of 12 MB. Please encourage families to upload at least one photo whenever possible. Sponsors value being able to see their sponsored friend, and the photo also provides authenticity to prove that the letter is from their sponsored friend.

Once the letter text is entered and photo(s) are attached, click Submit.

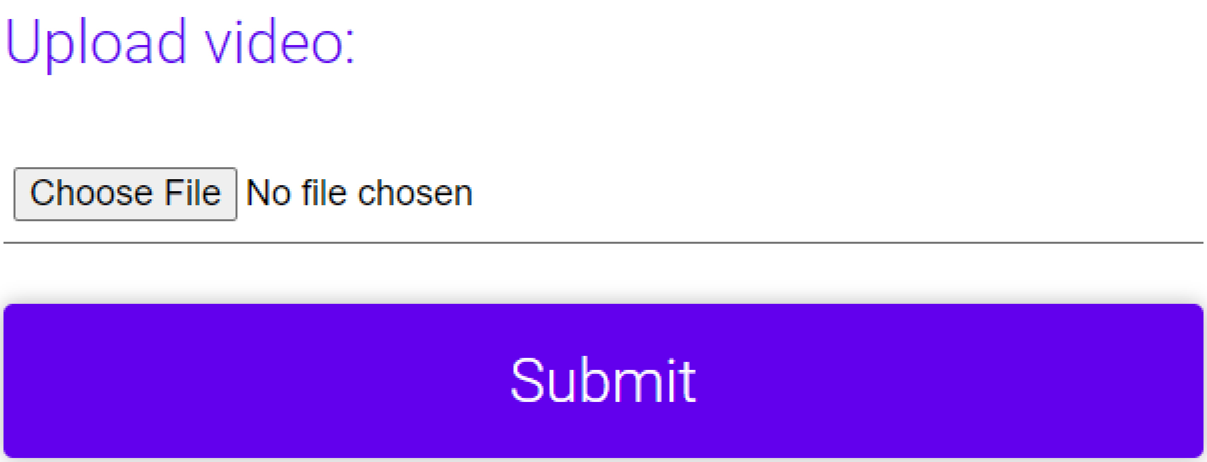
Once the letter has been uploaded, a message will display that says, "Success! Your letter is uploaded." It is not necessary for the family to do anything else unless they receive another notification asking them to upload another letter.

Success!

Your letter is uploaded.

7.4.3.2 Uploading a Video

Once Verify is clicked, if the family entered a unique code associated with a video notification, Portal will display a screen to select an .mp4 video file. The video cannot be more than 100 MB in size.



After uploading the video and clicking Submit, the family will see a success message:

7.4.3.3 Additional considerations for uploading correspondence from the external website

To upload an additional letter or video for another sponsored member, refresh the page.

If the one-time code has already been used, it is not possible to upload another letter or video for that sponsored member using the same code.

Each sponsored member can only upload one letter or video per batch, or one letter or video in a 24-hour period. If the sponsored member has received more than one notification and tries to upload 2 letters or videos in the same 24-hour period, they will receive a message saying the letter or video was already received.

In the next 24 hours, the letter or video will appear in Portal for review.

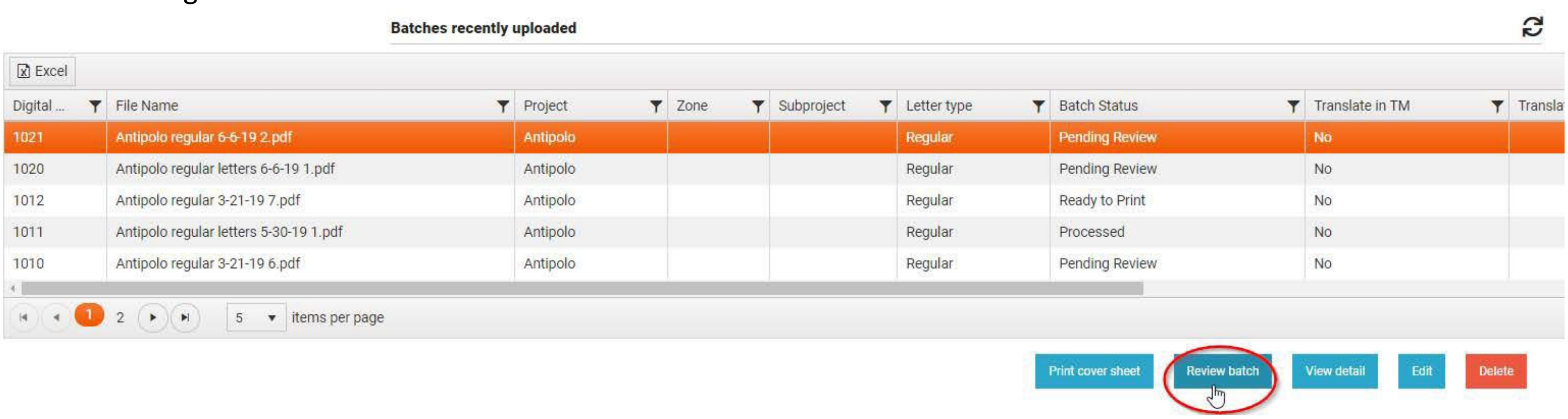
7.5 Review Batch Screen

After a batch of letters or videos is uploaded to Portal, each individual letter or video must be reviewed (approved or declined) before the batch will be sent to Kansas. It is necessary to identify any issues with letters or videos during this review step because it is the only point of review before they will be sent to sponsors. Letters and videos will not be reviewed for quality or content in Kansas before they are sent to sponsors.

The following roles in Portal at the project, zone and subproject level have access to review letters and videos: Project Admins, Coordinators, Correspondence Staff, Social Workers and Internal Translators; but each project should set a policy to determine which team members should review letters and videos.

Letters and videos can be approved or declined only in batches that are in Pending Review status, but you can open batches with other statuses to view the letters/videos and details, even after they have been approved or declined. However, it is not possible to modify the review action (whether a letter or video has been approved or declined) after a batch has been completely reviewed.

To review a batch of letters or videos, select a batch from the Batches recently uploaded grid and click the Review batch button.



Digital ...	File Name	Project	Zone	Subproject	Letter type	Batch Status	Translate in TM	Transla
1021	Antipolo regular 6-6-19 2.pdf	Antipolo			Regular	Pending Review	No	
1020	Antipolo regular letters 6-6-19 1.pdf	Antipolo			Regular	Pending Review	No	
1012	Antipolo regular 3-21-19 7.pdf	Antipolo			Regular	Ready to Print	No	
1011	Antipolo regular letters 5-30-19 1.pdf	Antipolo			Regular	Processed	No	
1010	Antipolo regular 3-21-19 6.pdf	Antipolo			Regular	Pending Review	No	

7.5.1 Letters Uploaded by Families

Letters uploaded by families from their mobile phones will be grouped in batches by subproject and the staff responsible assigned on the family record. Batches appear in Pending Review status on the Upload Letters page. For sponsored members who have never written a letter to their current sponsor, their letters will be grouped in a welcome letter batch. For sponsored members who have already written at least one letter to their current sponsor, their letters will appear in a regular letter batch. New batches will appear for review every 24 hours. Batches created yesterday will be available for review today. When initially clicking on “Review batch” for a batch of letters from families, a screen similar to the typed letter batch creation screen will display.

Note: it is only possible for one user to perform the steps below for each batch submitted by families, and all steps must be completed at once. In other words, it is not possible to edit some letters in a batch submitted by families, then to return and edit the rest of the letters. A batch submitted by families will only be claimed for 24 hours to the user that reviews it, then it will be unclaimed from that user and further edits will not be possible.

- Edit Letter button: below each letter, this button appears. Click this button to make small edits to the letter if necessary. After finishing the edits, click Save.
- Delete photos: it is possible to delete a photo from a letter from a family if necessary by clicking on the trash can icon on the photo. It is not possible to add a photo to a letter uploaded by a family.
- Mark as farewell button: if a letter from a family is a farewell letter, click this button to indicate this. All edits to the farewell letter should be made before clicking this button. The letter will then be removed from its current welcome or regular batch and moved to a new farewell letter batch. The new farewell letter batch will initially be in Creating status but will move to Pending Review status within one hour.
- Proceed to review: after viewing all letters from families in the batch and making small edits if necessary, click this button to open the batch in the Review Letters screen. Please note that once “Proceed to review” is clicked, it is no longer possible to return to the edit batch screen so all edits should be finalized before clicking this button.

7.5.2 Batch Information Section

At the top of the review screen, the following information is displayed:

- Letter/Video # of #: the number of the letter or video currently displayed and the total number of letters or videos in the batch.
- CH ID: a drop-down menu of all CH IDs with letters in the batch. Select a different CH ID to navigate to the letter/video for that child.
- Batch ID: the digital letters batch ID
- Letter type: regular, welcome, 91acknowledgement or farewell
- To be reviewed: the number of letters or videos that remain to be reviewed in the batch
- Approved: the number of approved letters/videos in the batch
- Declined: the number of declined letters/videos in the batch

7.5.3 Child and Sponsor Information Section

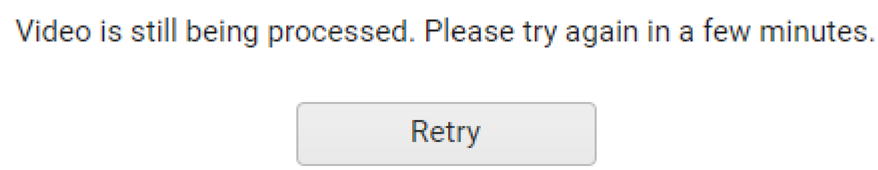
- CH ID
- Child Name
- Gender
- Age
- Project: the project, zone and subproject to which the individual belongs
- Area
- Community group
- ASC ID
- Sponsor name
- Sponsor gender
- Another Letter/video created in last 30 days warning: if another letter or video has been uploaded for the sponsored member in the last 30 days, a message displays to state this. This is only a warning, and it is possible the letter or video being reviewed should be approved and sent to Kansas. However, the reviewer should check to make sure the letter or video is not a duplicate of the last letter or video sent. This may also be an indication that letters or videos are being sent more frequently than necessary. If a letter or video has been declined by the project or Kansas in the last 30 days, this message does not display when uploading another letter or video for the same sponsored member since the sponsor will not receive the declined letter or video.

7.5.4 View Letter

For letter batches, the digital letter that was uploaded then displays. The reviewer should make sure the scanned image is high quality, that the letter was scanned in color, and that all pages of the letter were captured in the scan. The reviewer should also make sure the letter is from the sponsored member with the CH ID on the barcode label and that it is for the sponsor with the ASC ID on the barcode label. The reviewer should also review the content of the letter and make sure the letter meets general Unbound letter requirements and any additional requirements the project has.

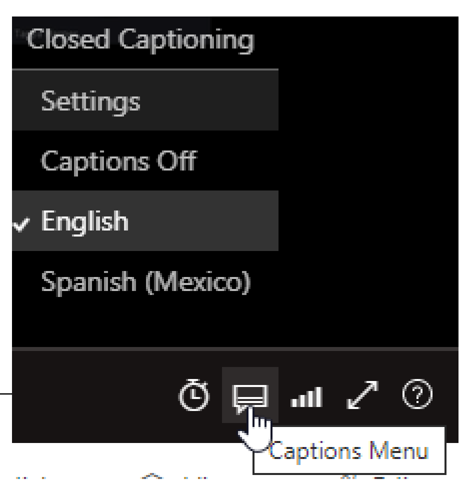
7.5.5 View Video and Edit Subtitles

When first opening a video batch for review, it is possible that the videos are still being processed by the video analyzer tool. This is the tool that adds automatic subtitles to the video based on the audio. If the videos are still being processed, you will see the message below, "Video is still being processed. Please try again in a few minutes." After a few minutes, click Retry, and the video should be viewable. All videos in a batch are processed simultaneously, so once one is available, subsequent videos in the batch will also be available.

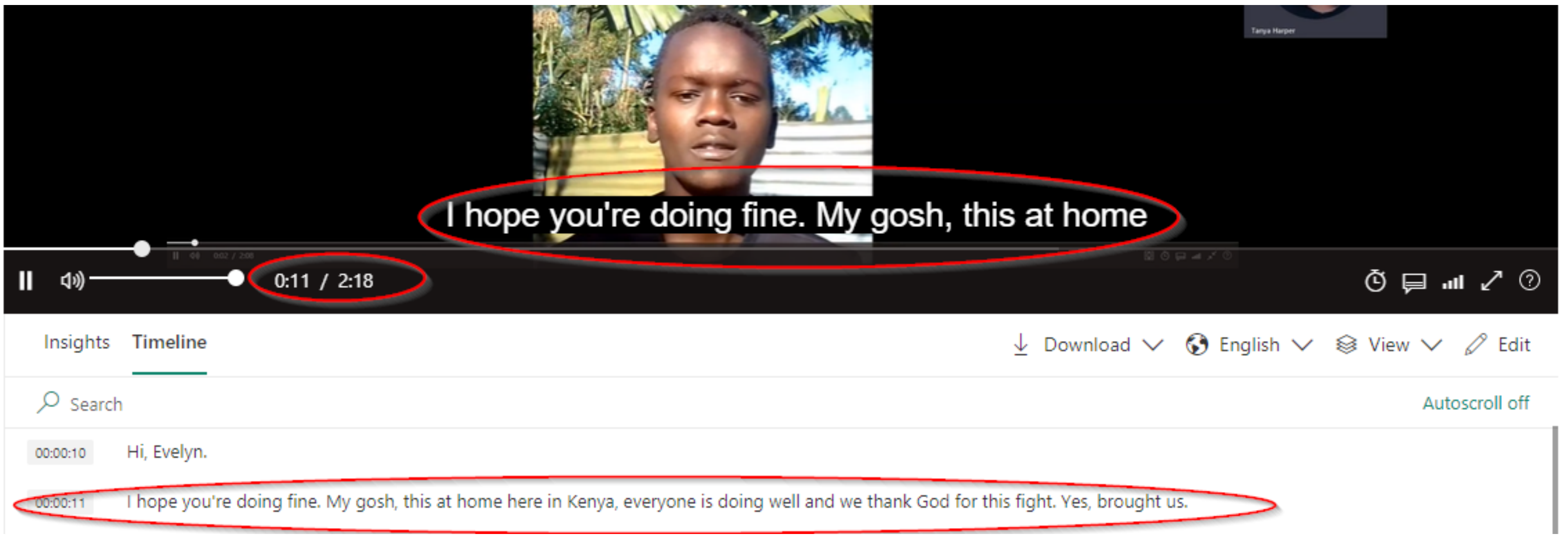


When the video is viewable, click on it to play it. It is necessary to watch and listen to the entire video to ensure the audio and visual quality are satisfactory, and that the content is correct and appropriate. It is also necessary to edit the automatic subtitles as needed. It is not possible to cut sections of the video or to edit the video itself. It is only possible to edit the subtitles.

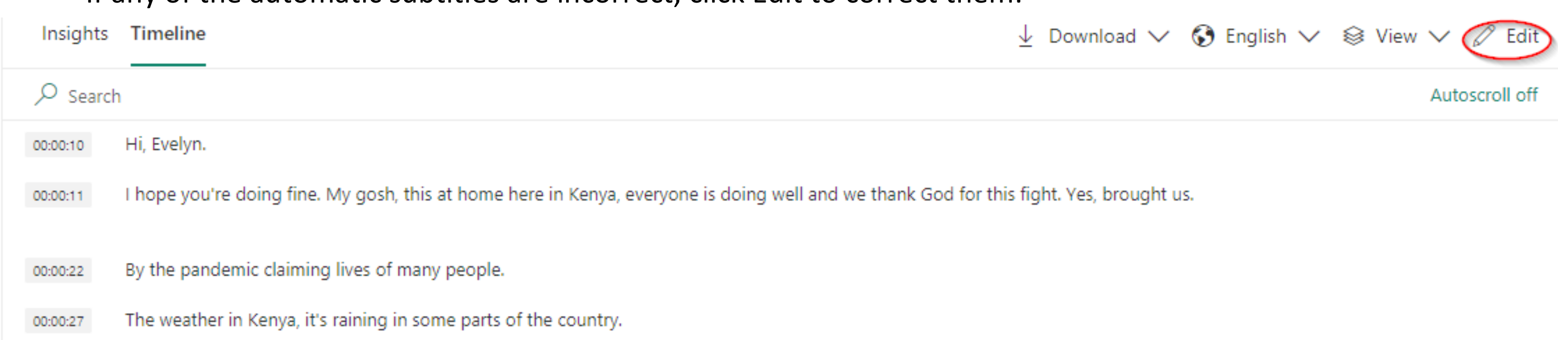
The subtitles on the video should automatically display in English, but if for some reason they do not, click on the Captions Menu in the lower right-hand corner of the video to change the language to English. Videos will be sent to sponsors with the subtitles in English, so it is necessary to view the subtitles in English to preview what the sponsor will receive.



Below the video, the timeline view appears, which will show the automatic subtitles. Clicking on a line of text in the Timeline when it is not in edit mode will automatically move the video to the time stamp listed, and the video will play from that point:

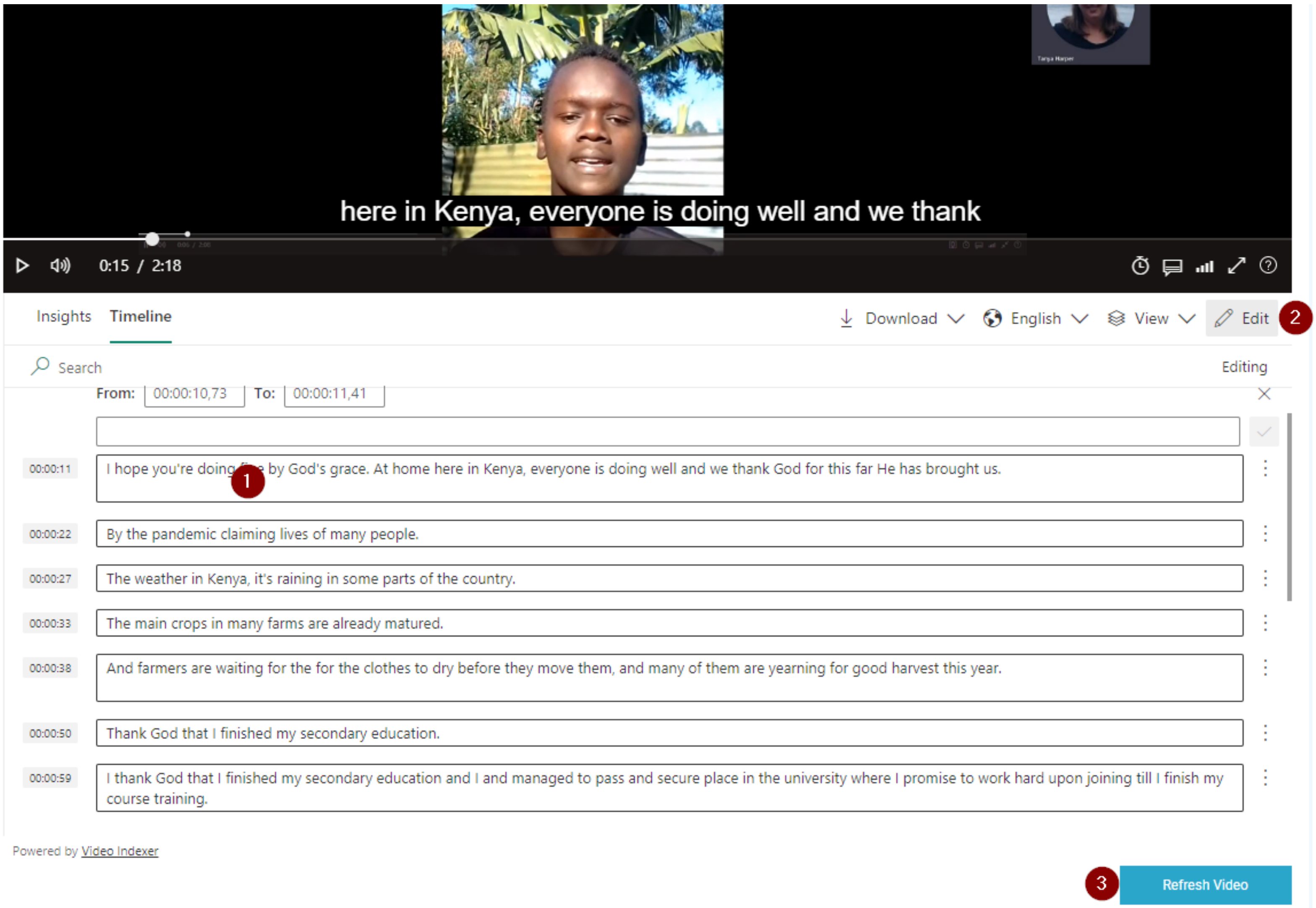


If any of the automatic subtitles are incorrect, click Edit to correct them:



The timeline will change to edit mode:

1. Make the necessary edits to the subtitles
2. Click Edit again to exit edit mode.
3. Click Refresh Video to incorporate the edited subtitles into the video when watching it.

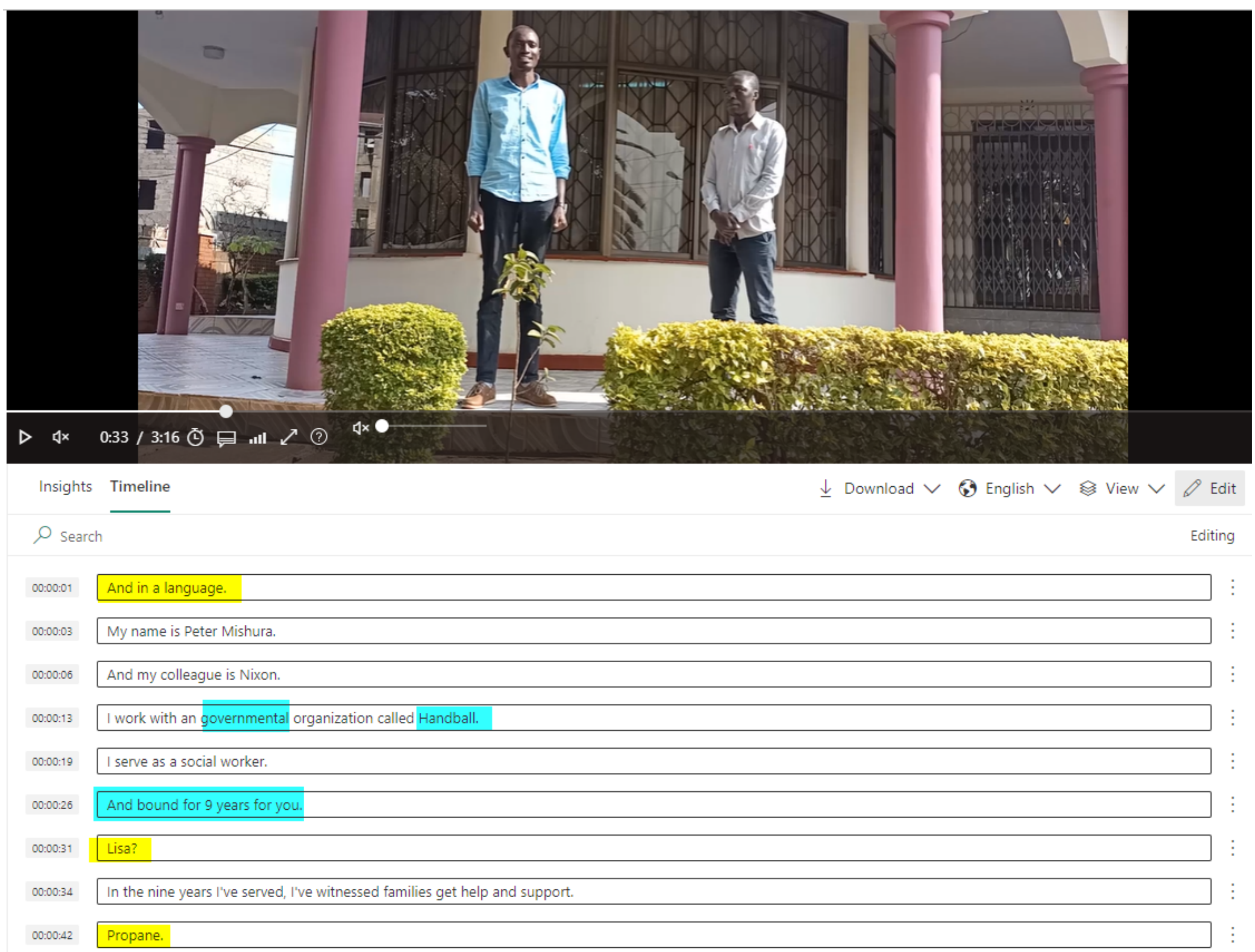


After editing all of the necessary subtitles, exiting edit mode, and refreshing the video, continue to the next Review steps, such as approving the video.

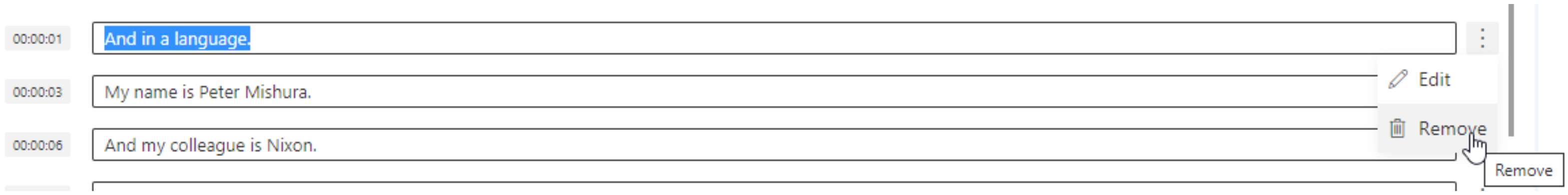
7.5.5.1 Editing subtitles for videos with an interpreter

It is possible to record a video where the sponsored member or guardian is speaking a language other than English. However, it is necessary to have an English-speaking interpreter in the video, such as a scholar or social worker. The sponsored member or guardian should speak a few sentences in the local language, then the interpreter should repeat those sentences in English. The sponsored member/guardian and interpreter should alternate speaking in this way throughout the video as opposed to having the sponsored member/guardian share their entire message at one time, followed by the entire interpretation in English. When the video is uploaded to Portal, it is possible that the subtitles for parts of the video not in English were not added. However, if any were added, it is necessary to remove them. The video analyzer tool cannot add subtitles for languages that are not English, so the subtitles for the non-English parts will not make sense.

For example, the video below has one person speaking in Swahili and one person interpreting in English. Some parts of the video in Swahili do not have any subtitles already, but some parts do, and they do not make sense because the video analyzer added English subtitles that match the sounds it heard in Swahili. It is necessary to remove the subtitles from the parts in Swahili and leave only the subtitles for the parts in English. It is also necessary to make edits to the English subtitles as needed. The subtitles highlighted in yellow below are from the parts in Swahili and need to be removed. The subtitles in blue are from parts of the video in English, but they need to be corrected:

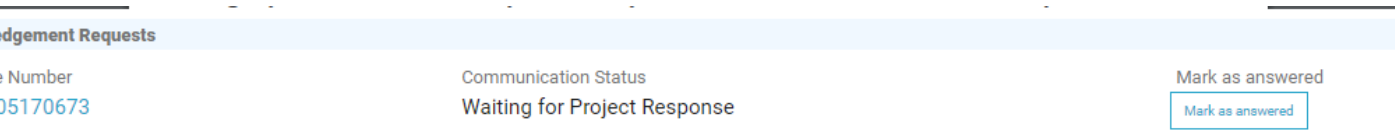


To remove the subtitles for the parts not in English, in Edit mode, click the three dots to the right of a subtitle and click Remove. Repeat this for each non-English subtitle as needed:



After removing the subtitles for non-English parts of the video and correcting the English subtitles as needed, click the Edit button to exit edit mode and click Refresh Video. Now, when playing the video, no subtitles will appear for the parts in Swahili, and the corrected subtitles will appear for parts in English. Then, proceed to the next review steps, as approving the video.

7.5.6 Acknowledgement Requests



For Acknowledgement Letter batches only, a section called Acknowledgement Requests displays on the review screen.

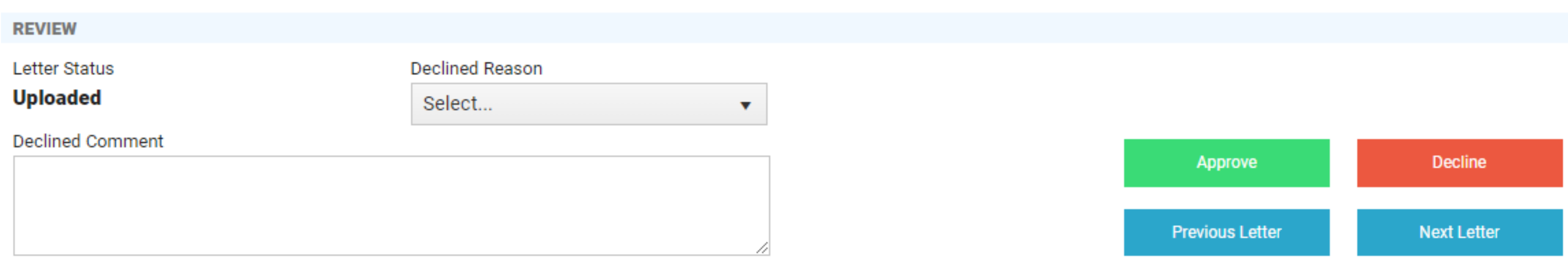
- Reference Number: a link that opens the details of the Acknowledgement Request communication in another tab.
- Communication status: the status of the Acknowledgement Request communication
- Mark as answered: to indicate that the digital letter answers one or more Acknowledgement Letter Requests, click the “Mark as answered button”. If the letter does not answer any Acknowledgement Letter requests as expected, do not click this button and instead decline the letter.

After marking Acknowledgement Request(s) as answered, continue to the Review section. It is ok to include a reply to a sponsor letter is an Acknowledgement Letter, so Acknowledgement Letters may also be marked as reply letters if appropriate.

Once a digital Acknowledgement Letter is submitted to Kansas, the status of the Acknowledgement Letter communication will also change to “Submitted to Kansas.” The letter will be processed and receive credit like other digital letters, at which point the communication will then be closed automatically.

7.5.7 Review Section

Below the letter or video, the following information displays in the Review section:



- Letter status: the current status of the letter, such as Uploaded, Approved or Declined
- Declined reason: a drop-down of declined reasons from which the reviewer can select if there is a problem with a letter:
  - Poor quality: For scanned letters, the scanned image of the letter is blurry, crooked, or otherwise low quality. For videos, the visual or audio quality is poor.

- Invalid Type: this reason may be automatically selected by Portal if a regular or welcome letter or video is uploaded for a retired sponsored member or if a regular letter or video is uploaded for a sponsored member that has not yet had a welcome letter credited
- Scan is not in color: all letters are required to be scanned in color. If one is not scanned in color, this reason should be selected.
- Invalid ASC ID: if the beneficiary is in change of sponsor status or if the ASC ID on the barcode label belongs to a different sponsor than the current sponsor of the sponsored member, the letter will be automatically declined by Portal for this reason when the letter is uploaded.
- Duplicate of last letter/video uploaded: if a duplicate letter or video is accidentally uploaded, it should be declined to prevent the sponsor from receiving a duplicate letter/video.
- Letter is illegible: it is not possible to read the letter because of the handwriting or another issue
- Does not reply to sponsor letter: if the sponsor has written a letter and the letter/video being reviewed is expected to reply to the sponsor letter, this reason can be selected.
- Content needs improvement: the content of the letter/video needs to be improved according to general Unbound or project letter guidelines
- Incorrect sponsor name: the name of the incorrect sponsor is written on the letter or stated in the video, or the name of the sponsor is spelled incorrectly on the letter
- Inappropriate request: the letter or video includes a request that is inappropriate per general Unbound or project letter guidelines
- Incorrect or future date: the date on the letter or stated in the video is an incorrect or future date
- Author/speaker not identified: the letter is written by someone other than the sponsored member and this person does not identify themselves in the letter, or, a speaker in the video does not identify themselves. However, if the author or speaker typically writes the letters or appears in the videos of the sponsored member and has introduced themselves in a previous letter or video to the current sponsor, it is not necessary to decline the letter or video.
- Direct contact mentioned: the sponsored member mentions contacting the sponsor directly or provides contact details
- Incorrect CH ID : the CH ID on the label belongs to a different sponsored member than the letter being reviewed, or the sponsored member in the video does not match the CH ID on the review screen.
- Letter/video is incomplete: if not all pages in the letter are captured in the scanned image, this reason should be selected. If a letter is approved and sent to the Translation Module, and the translator or reviewer discovers that the entire letter was not scanned, the letter will be declined for this reason from the Translation Module. If a video is cut off, this reason should be selected.
- Barcode unreadable: Portal was unable to read the barcode on a scanned letter. If the label was poor quality, another one should be printed and the letter should be re- scanned and re-uploaded. If the scan of the letter is poor quality, the letter should also be rescanned, possible at a higher resolution, and reuploaded.
- Other: if the reviewer determines that the letter or video should be declined for any other reason not included above, this reason can be selected.

- Declined comment: if Other is selected as the declined reason, a declined comment must be entered to specify why the letter is being declined. If another decline reason is selected, a comment can be entered optionally to provide more details about why the letter is being declined.

- View changes button: for letters uploaded by families only, this button appears. Click on it to display the “letter text changes” section that shows any changes to the letter made in Portal. Added text appears in green. Deleted text appears in red.
- Hide changes: for letters uploaded by families only, after clicking the “View changes” button, this button appears. Click it to hide the “letter text changes” section.
- Approve button: If the letter/video quality and content are acceptable, the reviewer should click the Approve button to approve the letter/video.
- Decline: if the letter/video is unacceptable for some reason, the reviewer should click the Decline button. It is required to enter a declined reason before declining a letter/video.
- Redo review: after the letter/video is approved or declined, if there is still at least one letter/99ideo in the batch to approve or decline, the review of the letter/video can be redone, meaning an approved letter/video can be declined or a declined letter/video can be approved. However, it is no longer possible to redo reviews after all letters/videos in the batch have been approved or declined.

7.5.8 Correspondence History Section

- From sponsored member: Digital letters/videos from the sponsored member uploaded in the last 12 months display here with the Date uploaded, Batch ID and links to the PDFs of the previous letters or links to videos.
- Status: the current status of each letter/video
- Translation: If the letter was sent to the Translation Module, after the letter is translated, the link to the translation will display. If a video batch was sent to the TM, a separate link for the translation does not display; it is necessary to view the video and change the language of the captions/subtitles to view the

translation.

- Declined reason: if a letter/video in the correspondence history was declined, the declined reason displays
- Declined comment: if a letter/video in the correspondence history was declined and a declined comment was entered, it displays
- From sponsors: Sponsor mail entries from the last 12 months display here with the Date Received, links to eLetters received and links to any attachments uploaded on the Mail page of Portal.
  - Mark as reply button: if the current letter/video that is being reviewed is considered a reply to one or more letters or eLetters from the sponsor, which means that the letter/video from the sponsored member responded to content or questions in the letter(s) from the sponsor, the reviewer can click “Mark as reply” to mark the reply as sent to the sponsor letter(s). Clicking “Mark as reply” will mark the reply as sent and record today’s date as the date the reply was sent on the Mail page for the sponsor mail entry(ies). It will also cause the sponsor mail entry(ies) to disappear from the Mail with No Reply Letter Sent report. A letter/video must first be approved before it can be marked as a reply to ensure that the content does respond to the sponsor letter(s). If the Mark as reply button is clicked by mistake, it is not possible to undo this from the review screen; however, the Reply Letter Sent date on the Mail screen can be cleared to indicate that the reply has not yet been sent.

7.5.9 Feedback Section

This field can be used to provide positive or negative feedback about the letter/video. Sometimes there may be a minor issue with the letter/video that does not warrant declining it, but it is helpful to share so that these issues do not keep happening. It is also important to share positive feedback so high-quality letters and videos continue to be sent.

7.5.10 Feedback History Section

If previous feedback has been entered for the same child and sponsor, this feedback displays in this section.

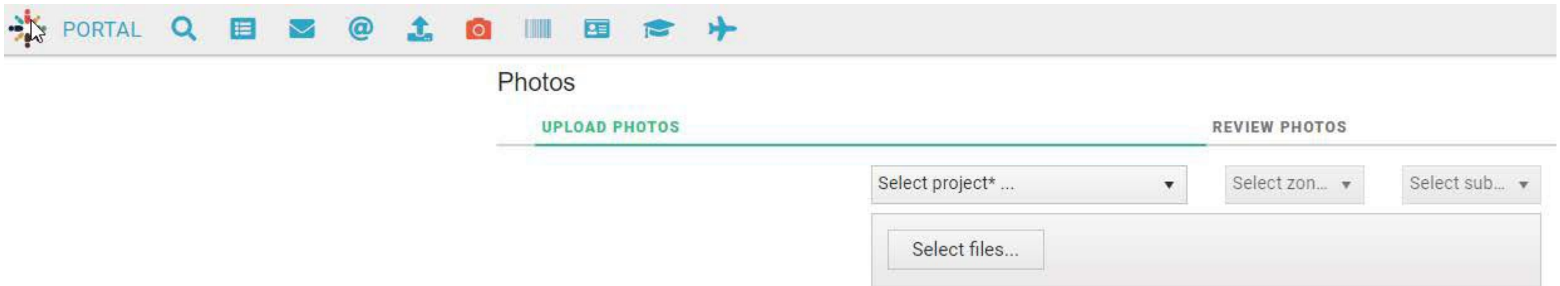
7.5.11 Finalize Section

After all letters/videos in the batch have been approved or declined, click the Complete Review button. This will cause the following to happen:

- For a batch that was not marked “Translate in TM”: approved letters/videos will be sent to Kansas to be credited, printed and mailed to sponsors. Declined letters/videos will appear on the Letters and Videos Declined report so the project can take the appropriate follow-up action, such as requesting a new letter or video.
- For a batch that was marked “Translate in TM”: approved letters/videos will be sent to the Translation Module to be translated. After the entire batch is translated and reviewed, the approved letters/videos will be sent to Kansas to be credited and sent to sponsors. Declined letters/videos will appear on the Letters and Videos Declined report so the project can take the appropriate follow-up action, such as requesting a new letter/video.

The Complete Review button can also be used to close the review screen without sending letters/videos to Kansas/the Translation Module if not all letters/videos have yet been approved or declined. This button can also be used to close the review screen if it was used to view a batch that has already been completely reviewed.

8 Photos

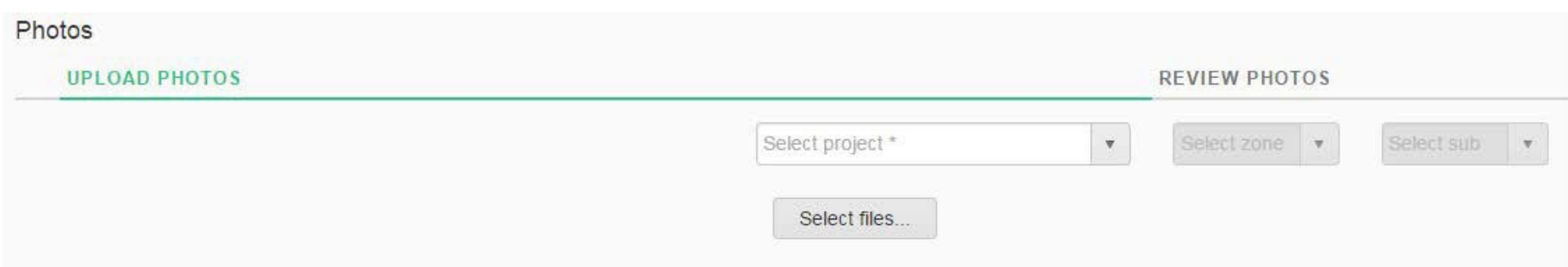


8.2 Photos Access

The Photos tab is available to Portal users with the role of Coordinator, Project Admin, Correspondence Staff and Social Worker. Coordinators, Project Admins, Correspondence Staff and Social Workers at the project, zone and subproject level have the ability to upload photos. Coordinators, Project Admins and Correspondence Staff at the project, zone or subproject level have the ability to review photos (approve or decline them before they are sent to Kansas).

8.3 Upload Photos tab

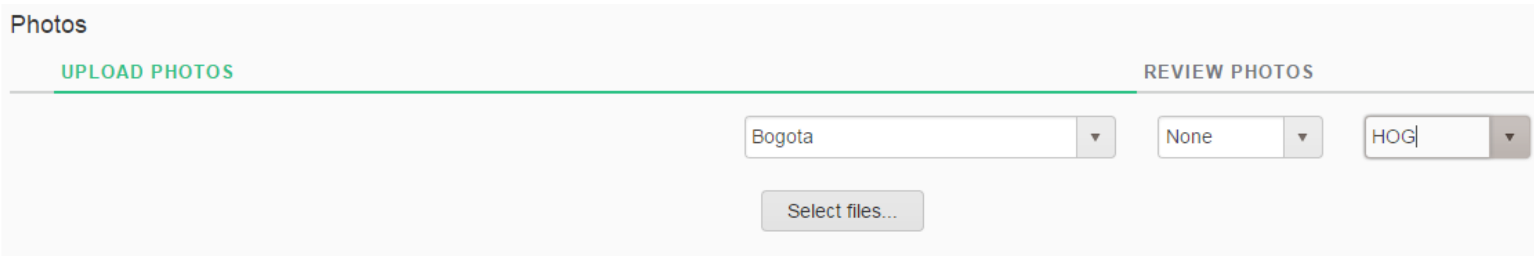
When clicking on the Photos page, the Upload Photos tab defaults. This tab is used to upload photos in zip files:



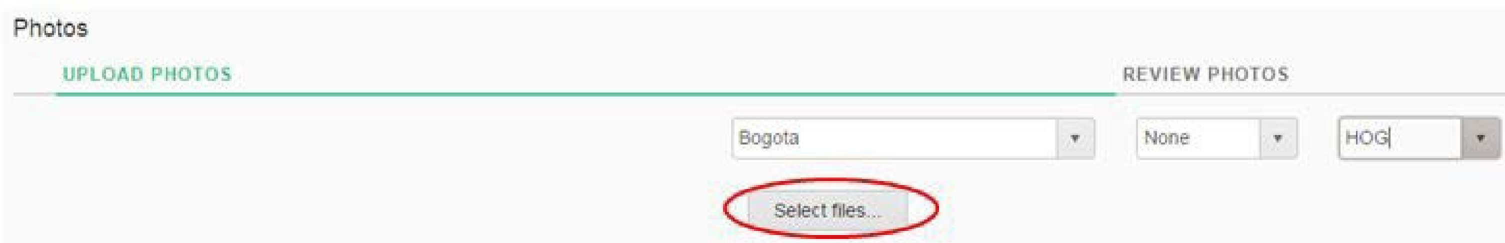
The Select project, Select zone and Select sub drop-down menus will populate according to the user's access. For example, for a user at the project level, the Select project drop-down menu will automatically be defaulted to the project to which the user has access. The project will be defaulted in the "Select Project" drop-down menu for all users. If the user only has access to one zone, the zone will be defaulted in the "Select Zone" drop-down menu. Otherwise, to select a subproject, the user will have to either select a zone or "None" in the zone drop-down menu to be able to select a subproject. If the user only has access to one subproject, the subproject will be defaulted in the "Select Subproject" drop-down menu.

8.3.1 How to upload photos

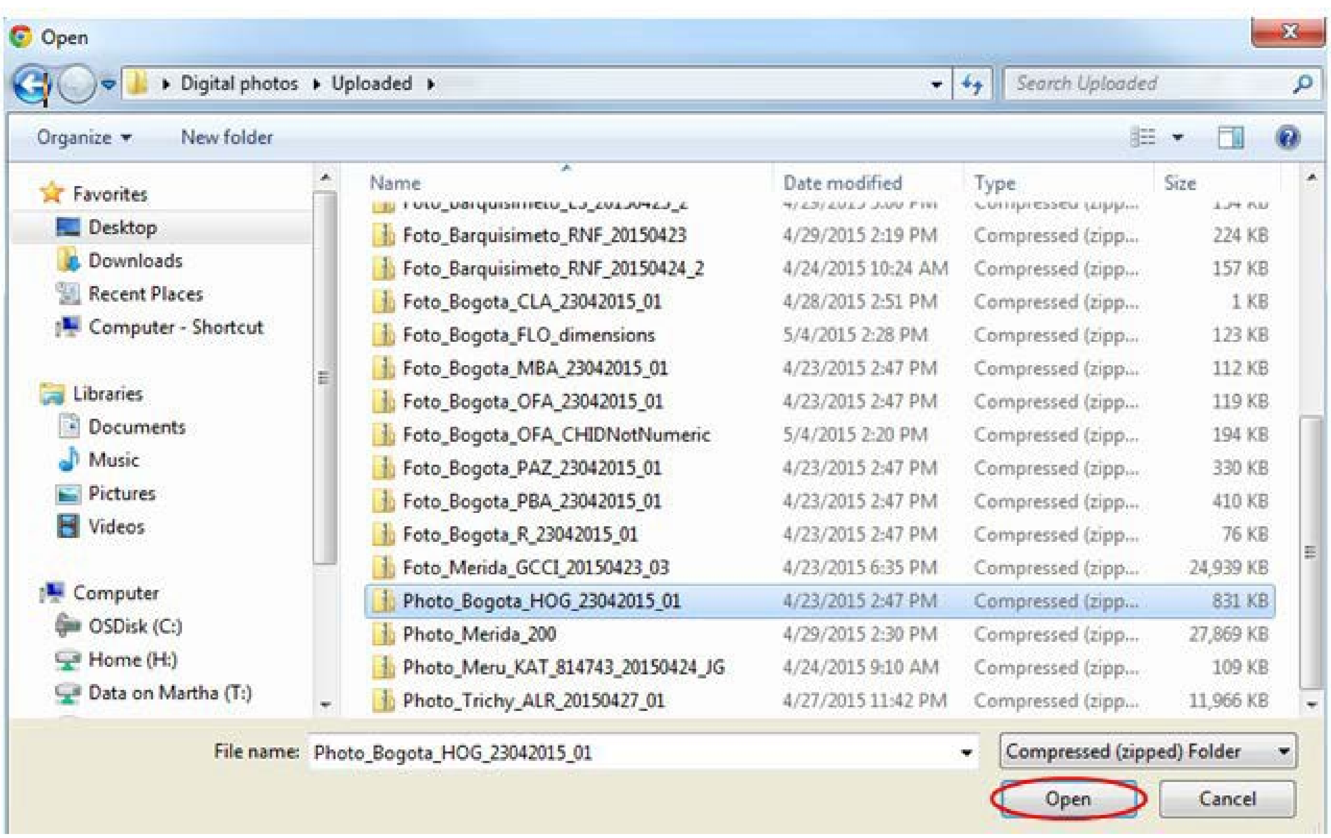
In order to upload a batch of photos, the user must select a subproject:



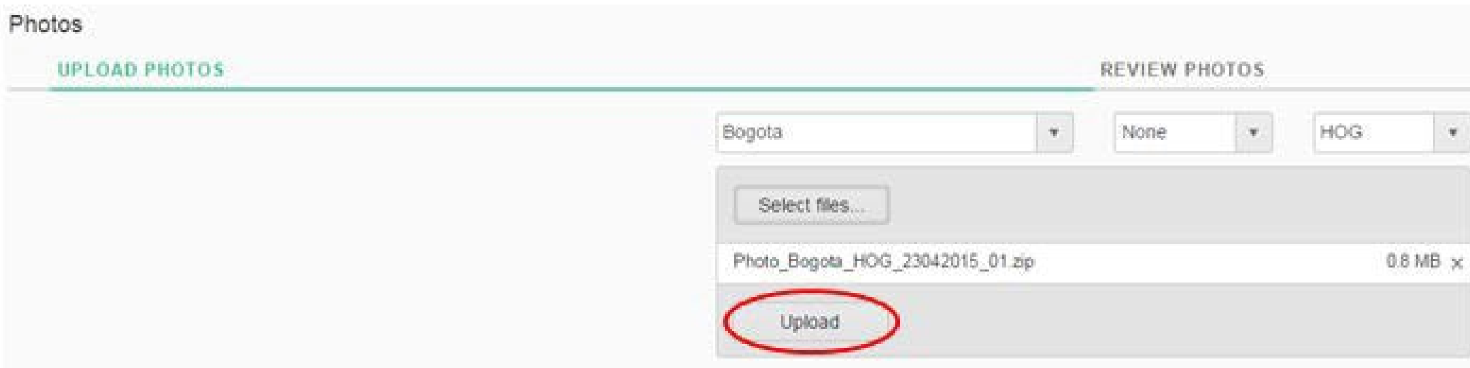
After selecting a subproject, click the Select files button to select a zip file of photos:



This will open a window to let the user navigate to the zip file on his/her computer. Select the zip file(s) you wish to upload. Multiple files can be selected by holding the control key and clicking on each file name. Click Open:



Once you have selected all of the files you wish to upload, click the Upload button:

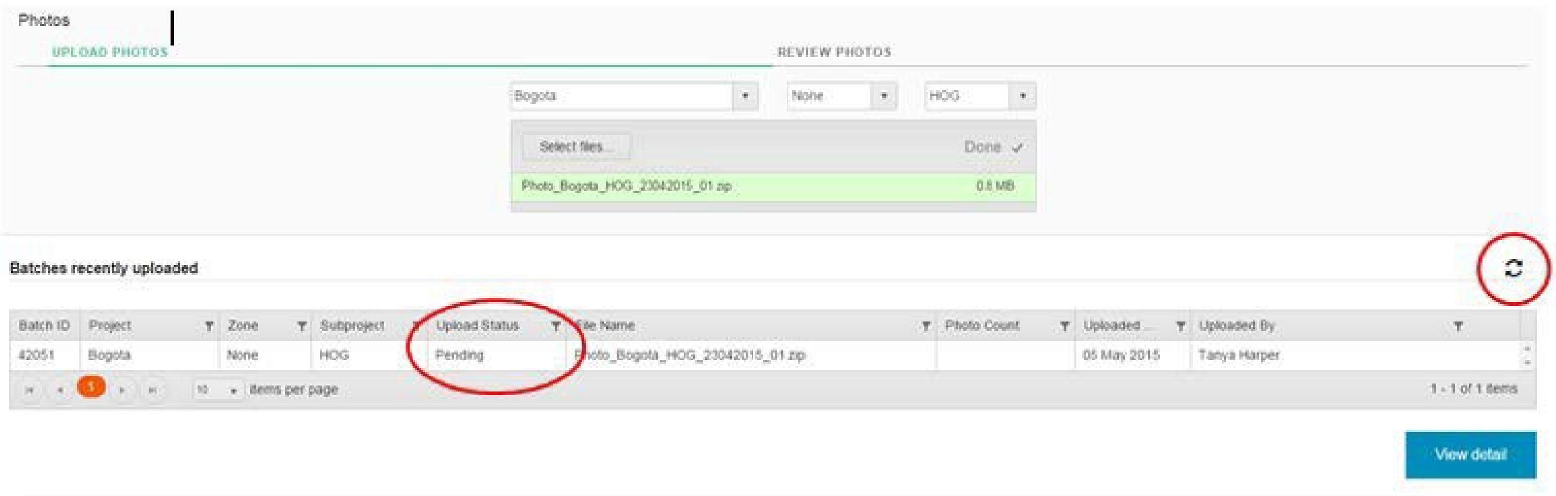


The batch(es) uploaded will appear in the "Batches recently upload grid" with the following columns:

- Batch ID: the number automatically assigned to a batch when it is uploaded
- Project: the project to which the batch belongs
- Zone: the zone to which the batch belongs
- Subproject: the subproject to which the batch belongs
- Upload Status:
  - Pending: when a batch is first uploaded, the Upload Status will be Pending while the system is checking the photos to make sure they meet all requirements
  - Success: once all photos in the batch have been checked, if no or select errors are found, the Upload Status will be Success. Select errors will decline photos with these errors but allow the other photos in the batch to continue to be reviewed:
    - Another photo has was received for the CH ID in the last 90 days
    - The CH ID does not belong to the subproject selected
    - The photo dimensions are not 480 x 640 pixels
  - Error: if any errors besides the select errors above are found with any of the photos in the batch, such as the photos are not named with the CH ID, the Upload Status will be Error.
- File Name: the name of the zip file that was uploaded
- Photo Count: the number of photos in the batch. This will display if the batch is successfully uploaded.
- Uploaded On: the date on which the batch was uploaded
- Uploaded By: the name of the user who uploaded the batch.

All batches in the last 60 days appear in the "Batches recently uploaded grid"; however, once a batch has already been reviewed, you may no longer view the details of that batch.

When the batch is first uploaded, it will have an Upload Status of Pending. The system will need a few moments to check all of the photos in the zip file to make sure they meet all of the digital photo specifications. After a few moments, click the Refresh icon to update the Upload Status:



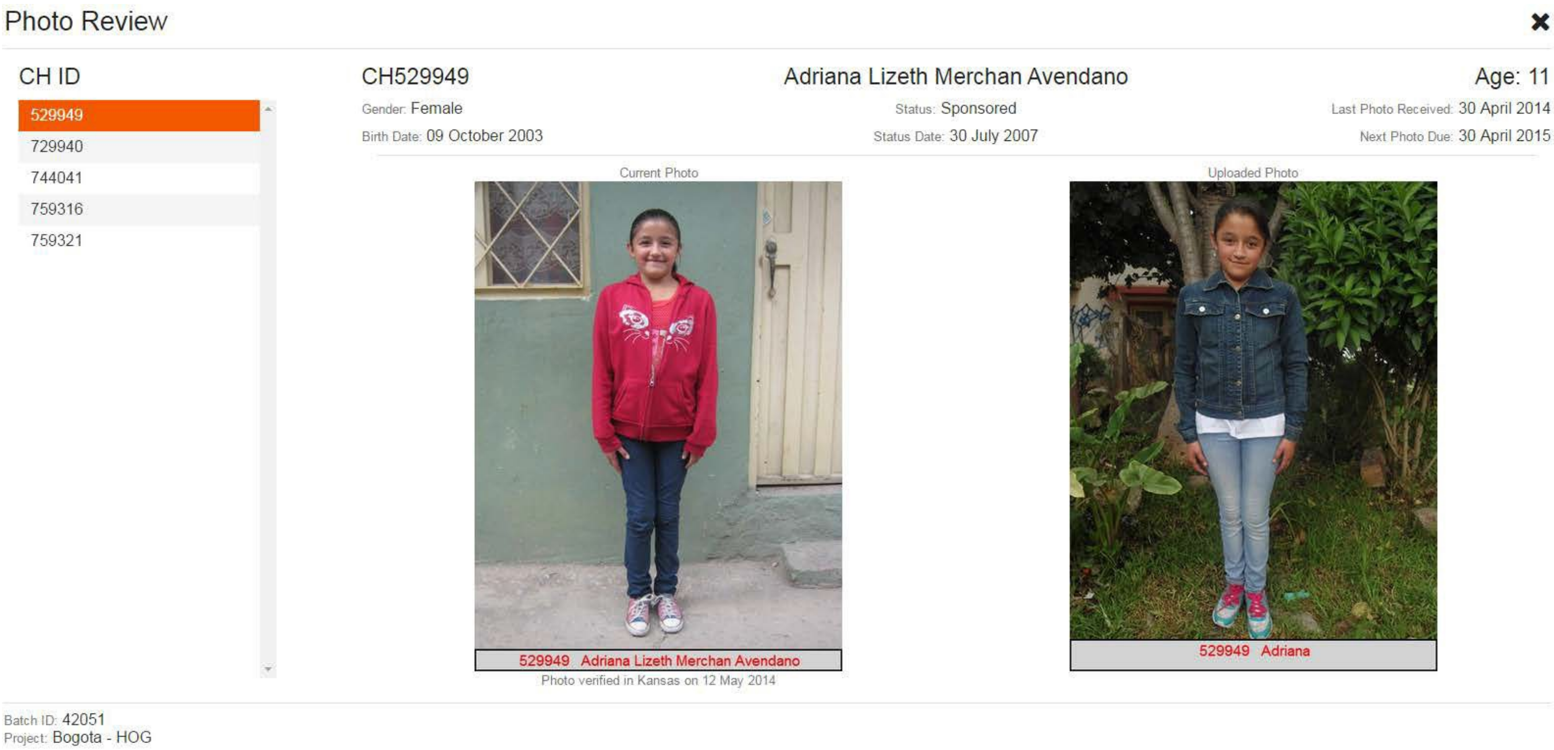
Once the system has finished checking all of the photos, if all of the photos meet all of the digital photo specifications, the Upload Status will say, “Success” and the number of photos in the batch will appear in the “Photo Count” column. The Upload Status will also say “Success” if some photos meet all of the specifications but not all. If any of the photos do not meet all of the following criteria, those specific photos will be automatically declined, and the rest will continue so they can be reviewed:

- Another photo was received for the CH ID in the last 90 days
- The CH ID does not belong to the subproject selected
- Photo dimensions are not 480 x 640 pixels

8.3.2 View detail – batch successfully uploaded

If the Upload Status says, “Success,” the user can now highlight the batch of photos in the grid and select the, “View detail” button to see the photos recently uploaded and the previous annual photo submitted for each sponsored member:

8.3.3 Photo detail screen



In the Photo Detail screen, all CH IDs that had a photo in the uploaded batch appear on the left-hand side. The user can navigate to view the photos of another CH ID by clicking on the CH ID with the mouse or by using the up and down arrows on the keyboard. The photo on the left is the CH ID's previous annual photo submitted to Kansas. The photo on the right is the photo that was recently uploaded. The following information displays at the top of the screen:

- CH ID
- Gender
- Birth Date
- Full name of the sponsored member
- Sponsorship status
- Status date
- Age
- Last Photo Received date
- Next Photo Due date

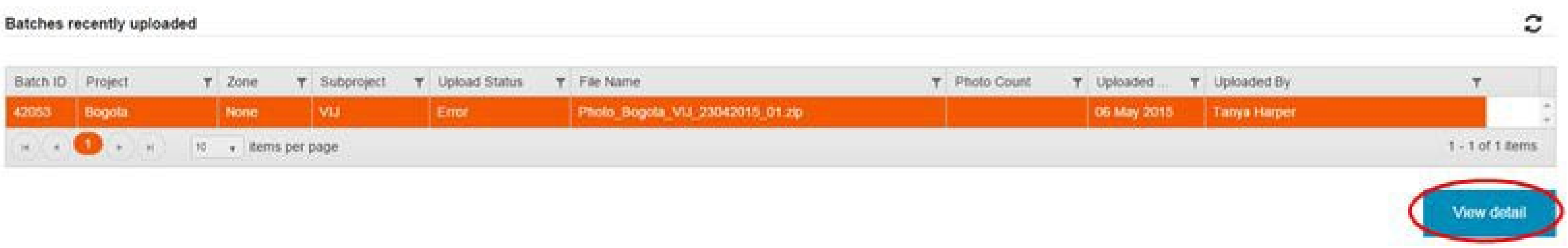
In the bottom left-hand corner, the Batch ID (the number automatically assigned to a batch of photos when it is uploaded) and the Project-Zone-Sub of the batch of photos display.

The batch of photos is now also available on the Review Photos tab to review before they will be sent to Kansas.

8.3.4 View detail – batch has errors

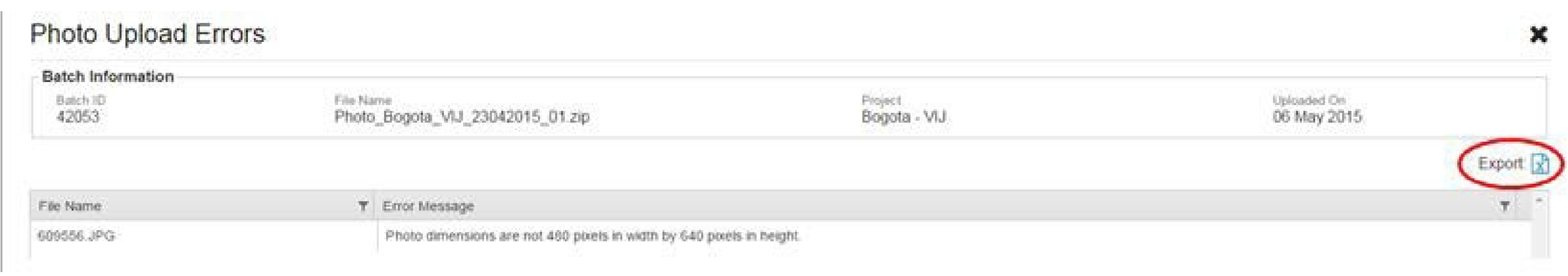
After uploading a batch, if the Upload Status says, "Error," this means that at least one photo in the batch had a problem, such as the photo was not named with the CH ID. error is fixed and the batch is uploaded again with a different name.

To view the errors in the batch of photos, highlight the batch in the grid and click "View detail":



8.3.5 Export list of errors to Excel

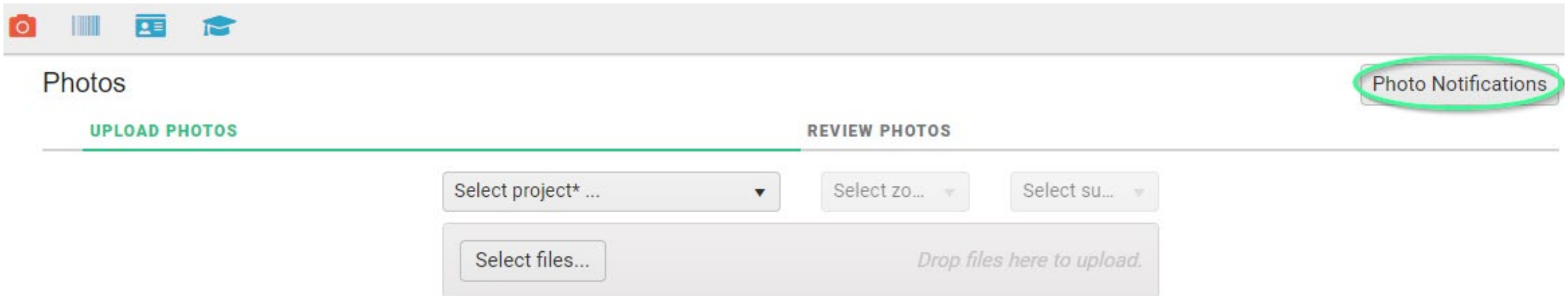
It is possible to export the list of errors to Excel to be able to track them, correct them, and re-import the batch of photos. Click on the Export icon. An Excel file will open in the lower left-hand corner of the Portal screen.



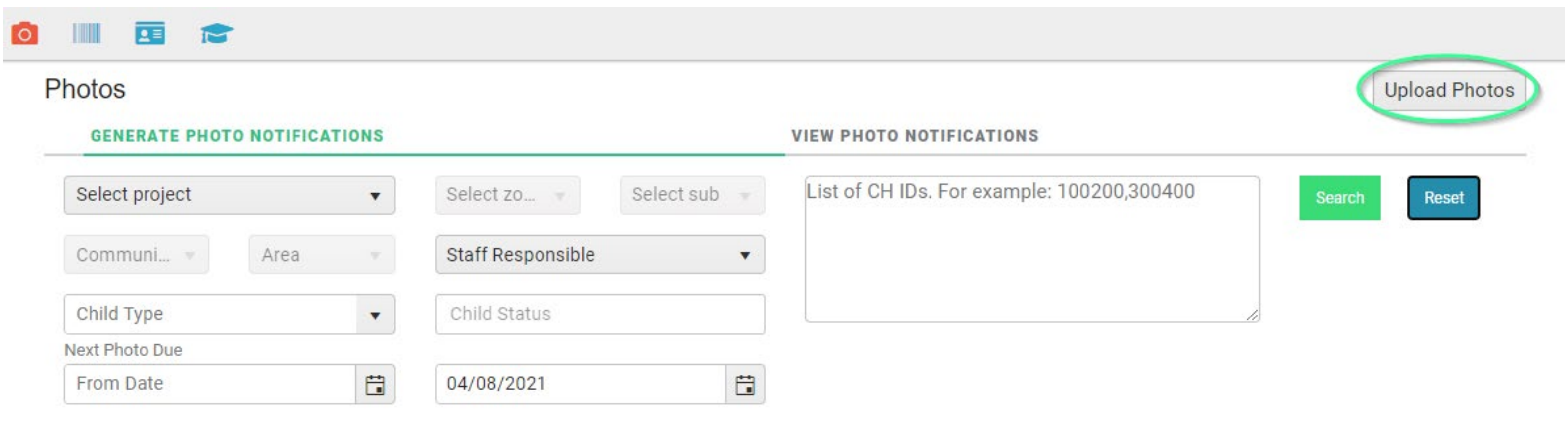
UNBOUND

8.4 Photo Notifications

The Photo Notifications page is used to send notifications to the mobile phones of sponsored families to ask them to upload an annual photo. Click the Photo Notifications button to go to this page:



To return to the Upload Photos or Review Photos page, click on the Upload Photos button:



8.4.1 Generate Photo Notifications tab

The Generate Photo Notifications tab is used to search for people that have a photo due in the coming months. The following search fields are available:

- Project
- Zone
- Subproject
- Community Group
- Area
- Staff Responsible
- Child Type
- Child Status
- Next Photo Due date: the default date range will show any photos that are past due up to photos that are due 4 months from today. When a photo is declined by Kansas, the due date is changed to 4 months from when the photo was declined, so the default date range will include all photos declined by Kansas. The date range can be changed to whatever works best for your

project.

- List of CH IDs: to search for a specific CH ID, type the CH ID, for example, 123456 and click Search. To create a list of specific CH IDs, type several CH IDs separated by a comma, for example: 123456,123457,123458 then click Search. If the CH ID(s) belong to a project, zone or subproject to which you have access, it will be added to the results grid. It is not necessary to include a space after the commas, and there should be no comma or space after the last CH ID entered. It is also possible to copy and paste a list of CH IDs from Excel as long as there is a comma after each CH ID. For more information about how to copy and paste a list of CH IDs from Excel, please see this video: https://drive.google.com/file/d/1wZqCtN1r2evzgUdrqpthLL1CI4PvzX3E/view?usp=sharing
- Search button: view the results that meet the selected search criteria
- Reset button: restore the search filters to their default values

Results grid:

The results grid shows the values that meet the selected search criteria. The following information is available:

- Zone
- Sub
- Area
- Group Name
- Staff Responsible
- Child Type
- CH ID
- Child Name
- Child Status
- Representative
- Phone Number: the phone number listed for the representative on the Representatives page
- Smart Phone: indicates if the phone number belongs to a smart phone, according to what is selected on the Representatives page
- Send communication: if communications from Portal should be sent to the phone number, according to the Representatives page
- Last Photo Received
- Next Photo Due
- Potential Communications: the number of communications that can potentially be sent. A CH ID may be listed in the results grid, but if a phone number is not available or if the child has already had a notification sent and a photo has not yet been received, this will not count as a potential communication.
- Excel: downloads an Excel file with the search results information
- Remove selected: removes highlighted rows from the grid
- Remove all: removes all rows from the grid.
- Generate notifications button: generates notifications that meet the criteria to send:

- Sponsored member has a representative with a phone number set to "Send communications"
    - Sponsored member does not already have an existing notification (but it is possible to generate another communication for a child with a photo in Declined by Project or Declined by Kansas status)
    - Sponsored member does not have a photo that has already been uploaded by the project in a zip file
    - Sponsored member has a next photo due date that is not more than 4 months in the future.
- Resending notifications: after sending a photo communication, if the status is undelivered or if the first notification was sent more than 15 days ago, it is possible to send another notification.

8.4.2 View Photo Notifications tab

The View Notifications tab is used to view photo notifications recently sent to families. The following search filters are available:

- Project
- Zone
- Subproject
- Created Date: the default date range shows photo notifications sent in the last 30 days, but the date range can be customized.
- View notifications: displays notifications that meet the selected search criteria
- Reset: restores search filters to their default values

Results grid:

The results grid shows the values that meet the selected search criteria. The following information is available:

- Zone
- Sub
- Area
- Group Name
- Staff Responsible
- CH ID
- Child Name
- One time code: the unique code that the family will use to upload the annual photo
- Representative
- Phone Number
- Smart Phone
- Message: the message the family receives, which will be sent via text message or WhatsApp, if the smart phone is connected to a WhatsApp account
- Status: the status of the communication:
    - Ready to send: once the communication is generated, it will remain in Ready to send

status for 24 hours, then it will be sent at the top of the next hour. For example, a message generated on 5 April at 10:17 am will be sent on 6 April at 11 am.

    - Sent: the message has been accepted by the mobile phone company
    - Delivered: the message has been delivered to the mobile phone
    - Read: the message has been read. This status is only available if the mobile phone number is connected to a WhatsApp account
    - Failed: the message could not be sent.
    - Undelivered: if the message has not been delivered successfully after 3 days, the status changes to undelivered and Portal will not attempt to send the message again. Portal will also automatically uncheck the "Send communications" checkbox in these cases so the phone number will not be used for future communications unless it is updated.
- Delivery Date: the date on which the communication was delivered or scheduled to be delivered
- Created Date
- Created By
- Photo uploaded: indicates if the photo has been uploaded using the one time code
- Batch ID: the ID of the photo batch in which the photo was uploaded
- Excel: downloads an Excel file with the search results information
- Cancel notification: cancels a notification that was previously generated. A communication can be cancelled between the time it is generated up to 3 minutes before it is scheduled to be sent, which is 24 hours after it is generated.

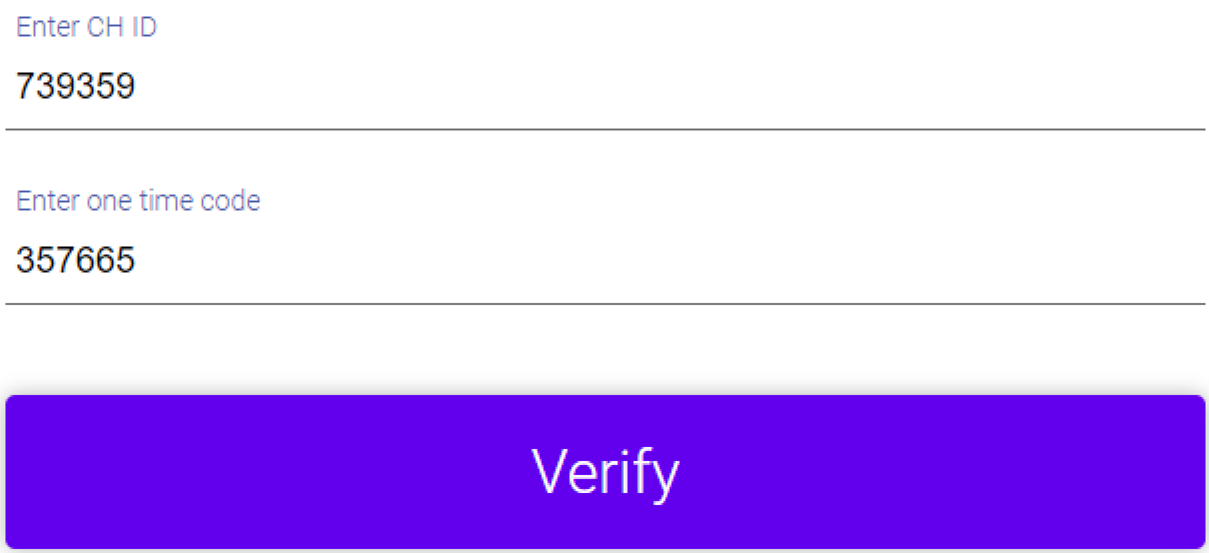
8.5 Uploading photos from external website

After using the Photo Notifications page to send photo notifications to mobile phones to ask families to upload their own annual photos, the photos can be uploaded from https://portal.unbound.org/family

The following fields are required:

- CH ID: the family will need to know their CH ID. It will not be included in the message they receive for security purposes.
- Enter one time code: the family will receive this code in the message they receive. It is also available on the View Photo Notifications page. This is required to prevent malicious, automated programs from uploading files to Unbound systems.

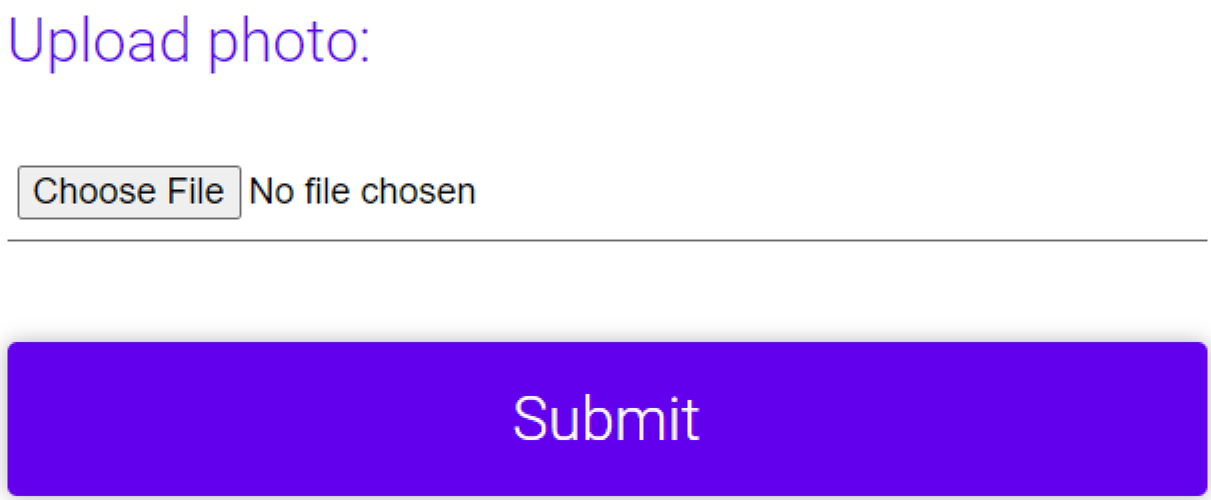
Then click on Verify:



An option will then appear to select the file. A photo should be selected from the device that is used to upload the photo. Once a photo has been selected, click Submit to upload it.

The photo must be in a .jpg or .jpeg format.

The height of the photo cannot be more than twice the width of the photo, and the width of the photo cannot be more than twice the height of the photo.



Once the photo has been uploaded, a message will display that says, “Success! Your annual photo is uploaded.” It is not necessary for the family to do anything else unless they receive another notification asking them to upload another photo, which means the first photo was declined.

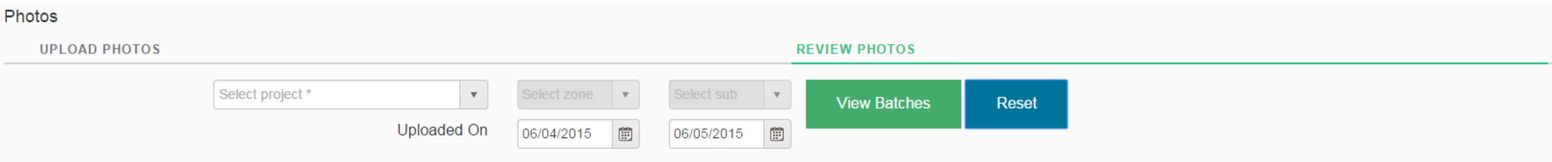
Success!

Your annual photo is uploaded.

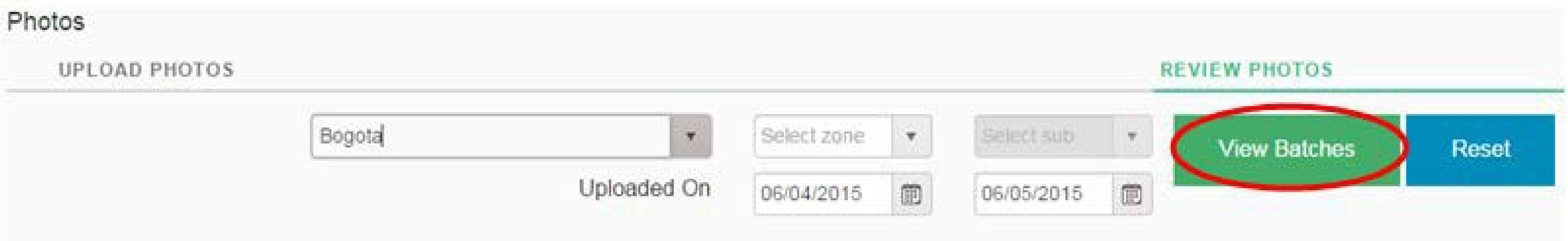
To upload an additional photo for another sponsored member, click refresh.

If the one time code has already been used, it is not possible to upload another photo for that sponsored member using the same code.

8.6 Review Photos tab



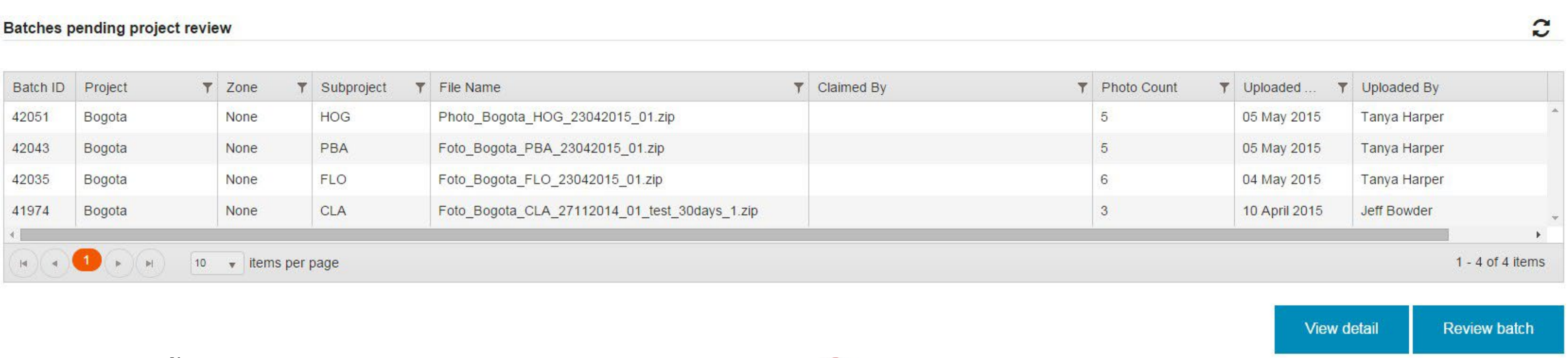
To view the batches of photos that are pending review, click on the Review Photos tab. The Select project, Select zone and Select sub drop-down menus will be defaulted according to the user's access. The Uploaded On date filters will default to the last 30 days, meaning that photo batches uploaded in the last 30 days will display by default. Photos uploaded from the external website by families will appear every 24 hours. For example, photos that were uploaded yesterday will appear for review today. To see batches pending review, click View Batches:



8.6.1 Batches pending project review grid

The batches pending review will appear in the grid with the following columns:

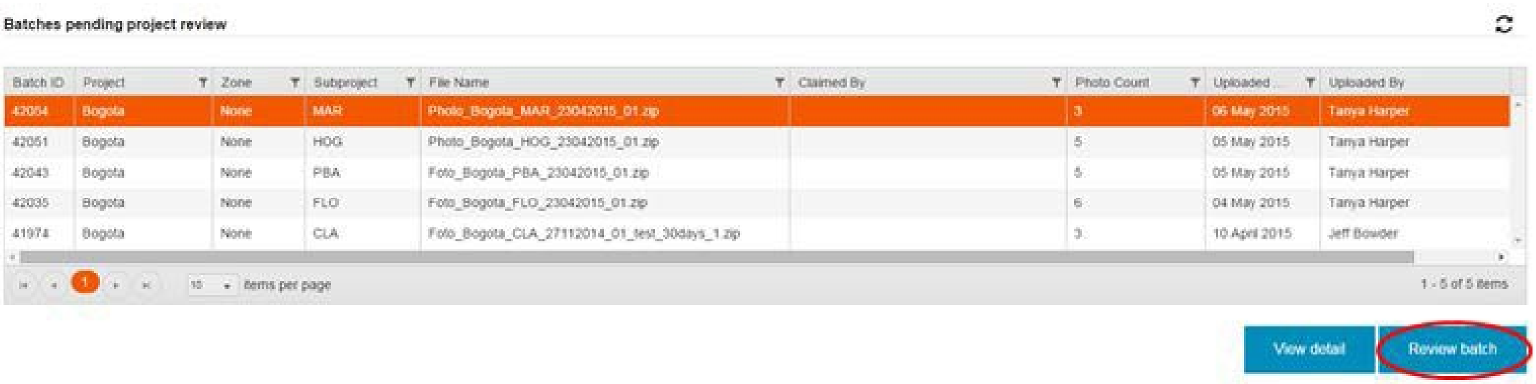
- Batch ID: the number automatically assigned to a batch when it is uploaded
- Project: the project to which the batch belongs
- Zone: the zone to which the batch belongs
- Subproject: the subproject to which the batch belongs
- File Name: the name of the batch of photos. If the batch was uploaded in a zip file, the name will begin with Photo_ or Foto_. If the batch was uploaded from the external website, the batch will begin with the project name.
- Claimed By: the name of the user who is currently reviewing the batch, if applicable
- Photo Count: the number of photos in the batch
- Uploaded On: the date on which the batch was uploaded
- Uploaded By: the name of the user who uploaded the batch


Batches pending project review

Batch ID	Project	Zone	Subproject	File Name	Claimed By	Photo Count	Uploaded ...	Uploaded By
42051	Bogota	None	HOG	Photo_Bogota_HOG_23042015_01.zip		5	05 May 2015	Tanya Harper
42043	Bogota	None	PBA	Foto_Bogota_PBA_23042015_01.zip		5	05 May 2015	Tanya Harper
42035	Bogota	None	FLO	Foto_Bogota_FLO_23042015_01.zip		6	04 May 2015	Tanya Harper
41974	Bogota	None	CLA	Foto_Bogota_CLA_27112014_01_test_30days_1.zip		3	10 April 2015	Jeff Bowder

8.6.2 Review batch of photos

Before sending a batch of photos to Kansas, each batch must be reviewed by the project and each photo must be either approved or declined. To review a batch of photos, highlight the batch in the grid and click “Review batch”.



8.6.3 Photo Review Screen

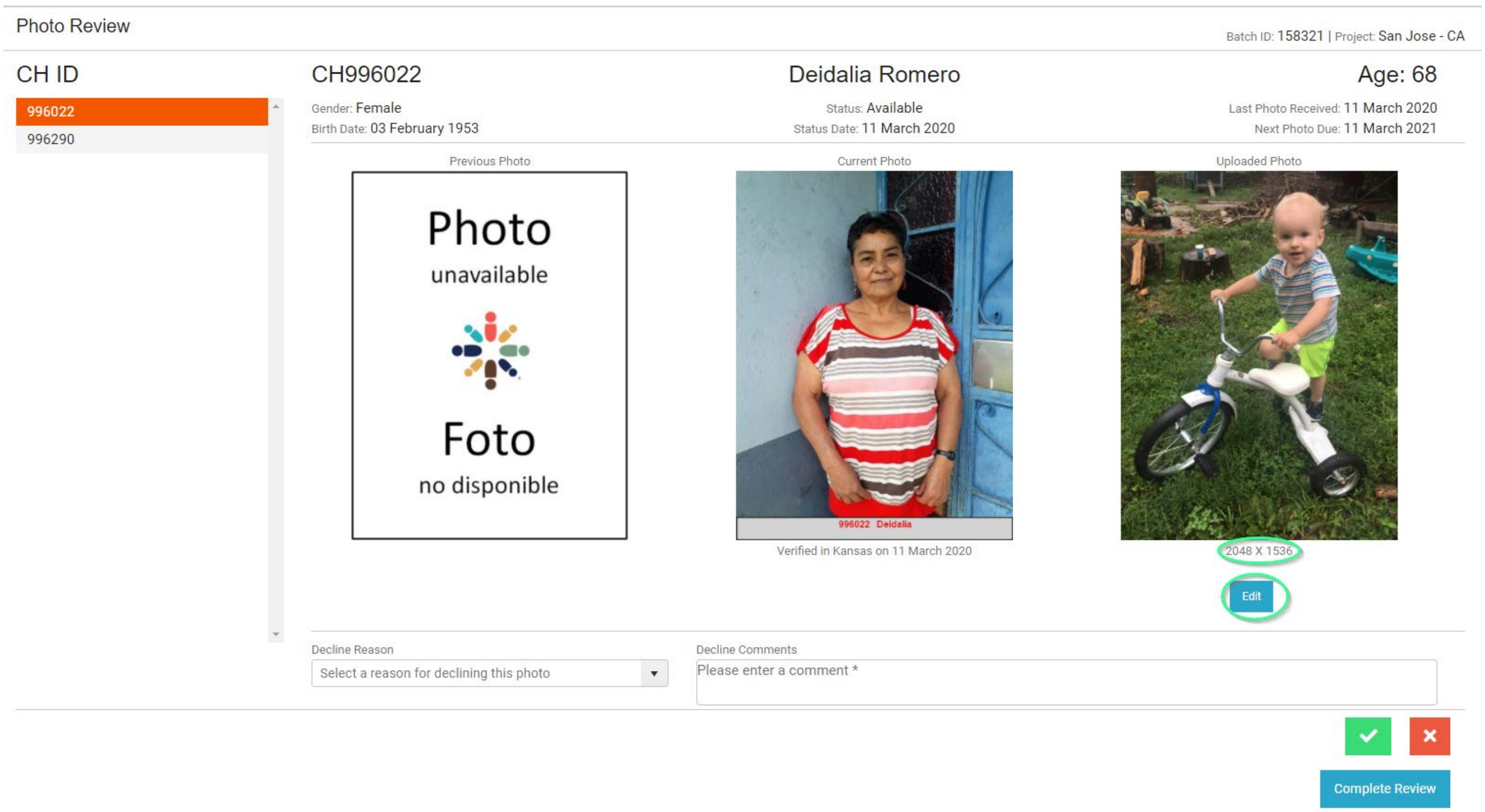
In the Photo Review screen, all CH IDs with a photo in the selected batch appear on the left-hand side. The user can navigate to view the photos of another CH ID by clicking on the CH ID with the mouse or by using the up and down arrows on the keyboard. The photo on the left is the CH ID's previous annual photo submitted to Kansas. The photo on the right is the photo that was recently uploaded. The following information displays at the top of the screen:

- CH ID
- Gender
- Birth Date
- Full name of the sponsored member
- Sponsorship status
- Status date
- Age
- Last Photo Received date
- Next Photo Due date

In the bottom left-hand corner, the Batch ID (the number automatically assigned to a batch of photos when it is uploaded) and the Project-Zone-Sub of the batch of photos display. In the bottom right-hand corner, an approve button (green checkmark) and a decline button (red x) are shown.

8.6.3.1 Edit screen

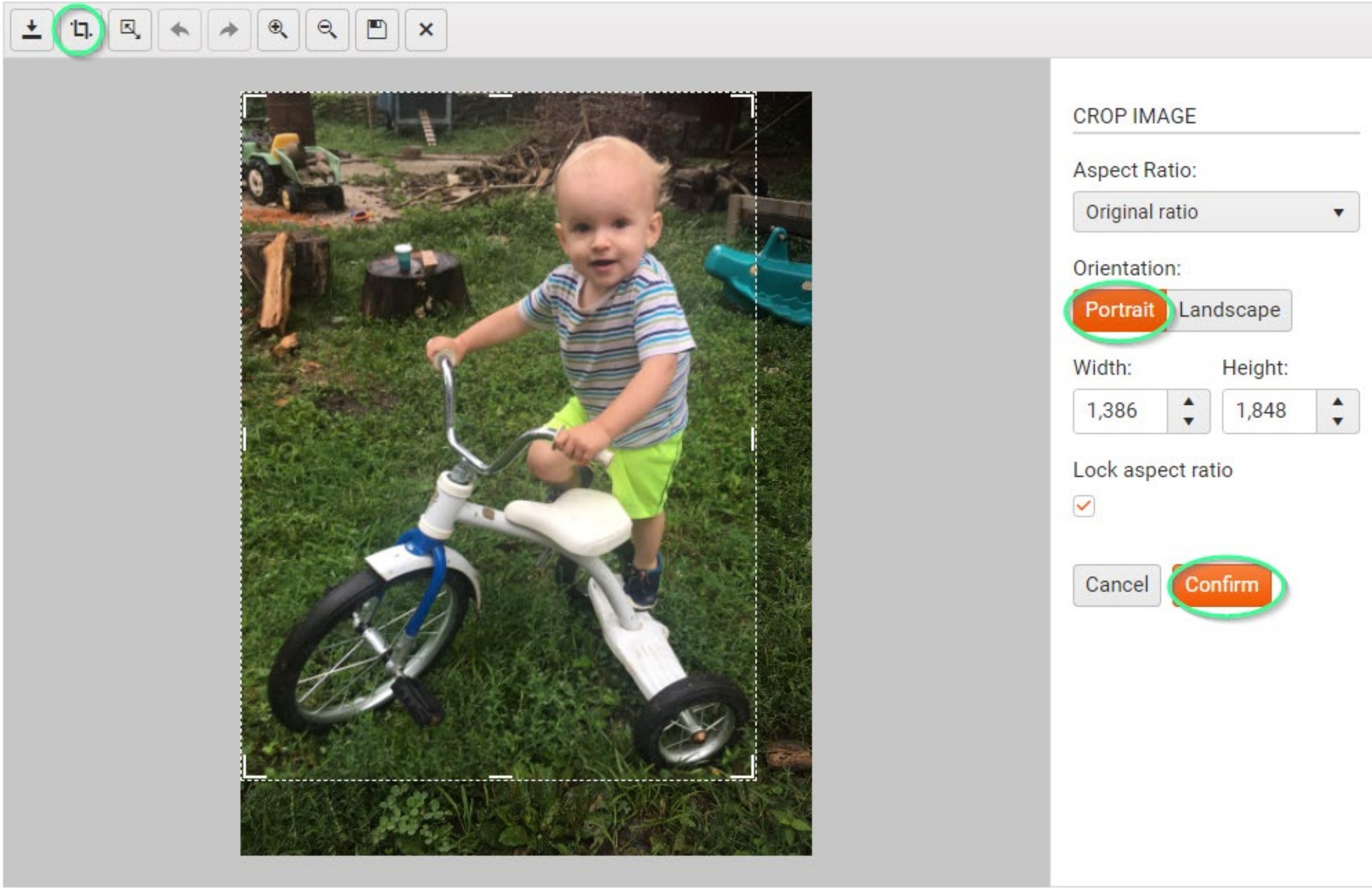
Photos uploaded by families from the external website are not required to have standard dimensions when they are uploaded; however, they must be edited to have dimensions of 480 pixels in width x 640 pixels in height in order to approve or decline them in Portal. This is so photos can be printed in a uniform size and be displayed on the Unbound website in uniform way. You can see the height and width of the photo the family uploaded on the review screen. To edit the dimensions or other aspects of the photo, click the Edit button to open the Edit screen:



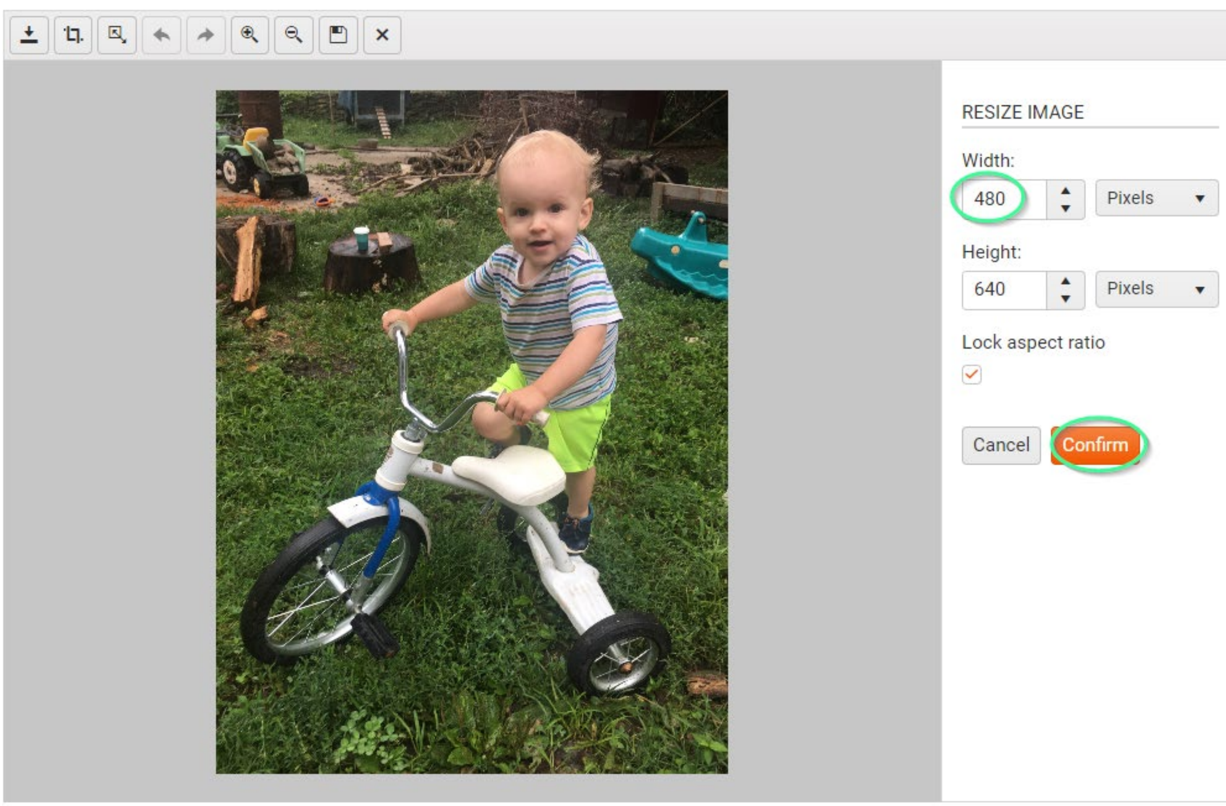
The edit screen has several icons across the top of the screen:

- Download image: save the image to your computer or another location. Once the image has been edited and saved, it is no longer possible to revert to the original image, so downloading the image is the only way to maintain the original copy without requesting it from the family.
- Rotate: rotates the image clockwise by 90 degrees.
- Crop: this is used to set the orientation of the photo and to crop out some of the background if necessary.
  - Aspect ratio: leave Original ratio selected
  - Orientation: select Portrait
  - Width and Height: leave the width and height listed. These can be modified using the Resize icon
  - Lock aspect ratio: leave this selected

  After selecting Portrait orientation, drag the frame to capture the desired selection of the photo, focusing more on the sponsored member if necessary. You can resize the frame if necessary by dragging a corner of it. Once you have done this, click Confirm:

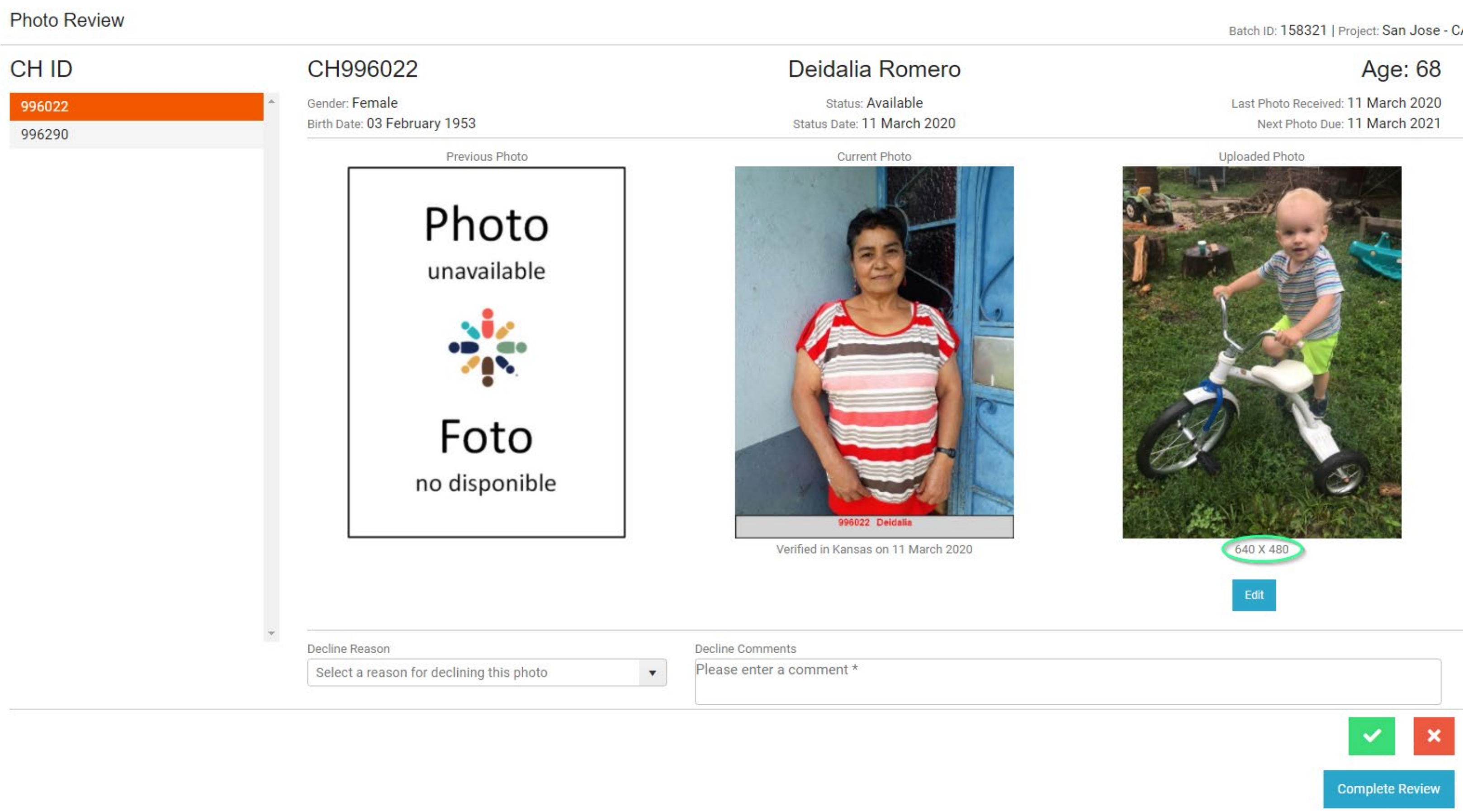


- Resize image: to set the photo to the standard dimensions of 480 in width by 640 in height, type 480 in the width field. Generally, the height will calculate automatically to 640 because the “Lock aspect ratio” checkbox is selected. If the height does not automatically change to 640, deselect the “Lock aspect ratio” checkbox so you can type 640 in the height field. It is necessary to ensure the quality of the photo is not distorted when deselecting “lock aspect ratio” and typing a custom height. Click Confirm when the pixels are 480 x 640.



- Undo: reverts the last edit made if it has not yet been saved
- Redo: reapplies a change that was undone
- Zoom in: zooms in on the photo
- Zoom out: zooms out from the photo
- Save: saves the edits made to the photo and closes the edit screen. Once the Save button is clicked, it is not possible to undo changes to the photo.
- Cancel: closes the Edit screen without saving the changes made.

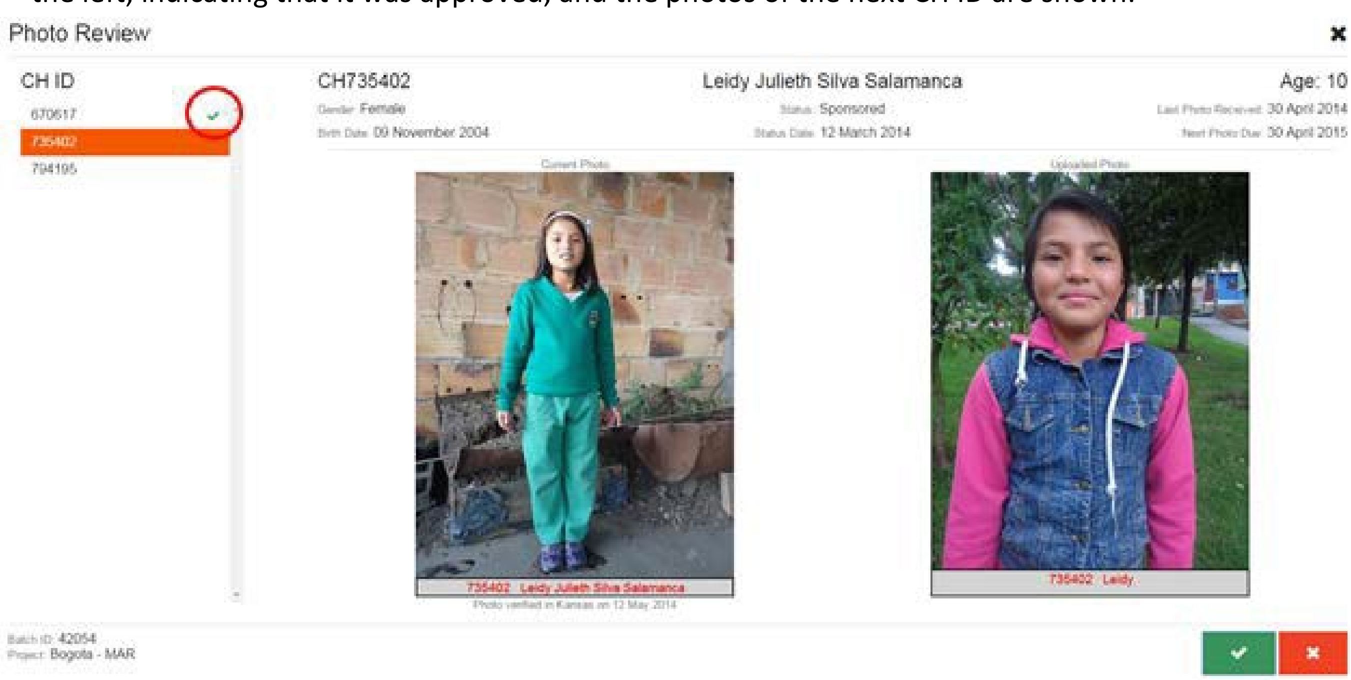
Once you have edited and saved the photo, the Review screen will appear, and the pixels entered on the Edit screen appear under the photo. Continue to approve or decline the photo as appropriate (see more information below).



8.6.3.2 Approve a photo

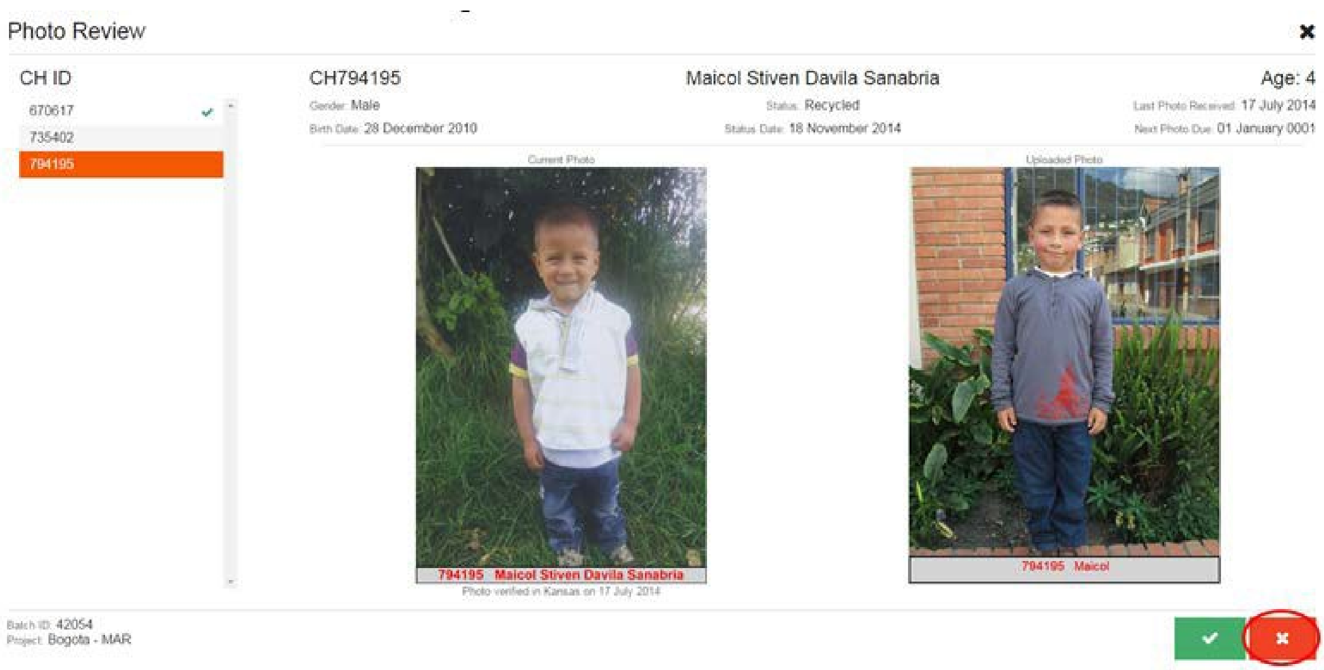
If the photo recently uploaded is appropriate, is of good quality and is of the correct person, the photo should be approved. To do this, click the green checkmark button in the lower right-hand corner of the review screen:

The CH ID whose photo was just approved now appears with a green checkmark in the list on the left, indicating that it was approved, and the photos of the next CH ID are shown:



8.6.3.3 Decline a photo

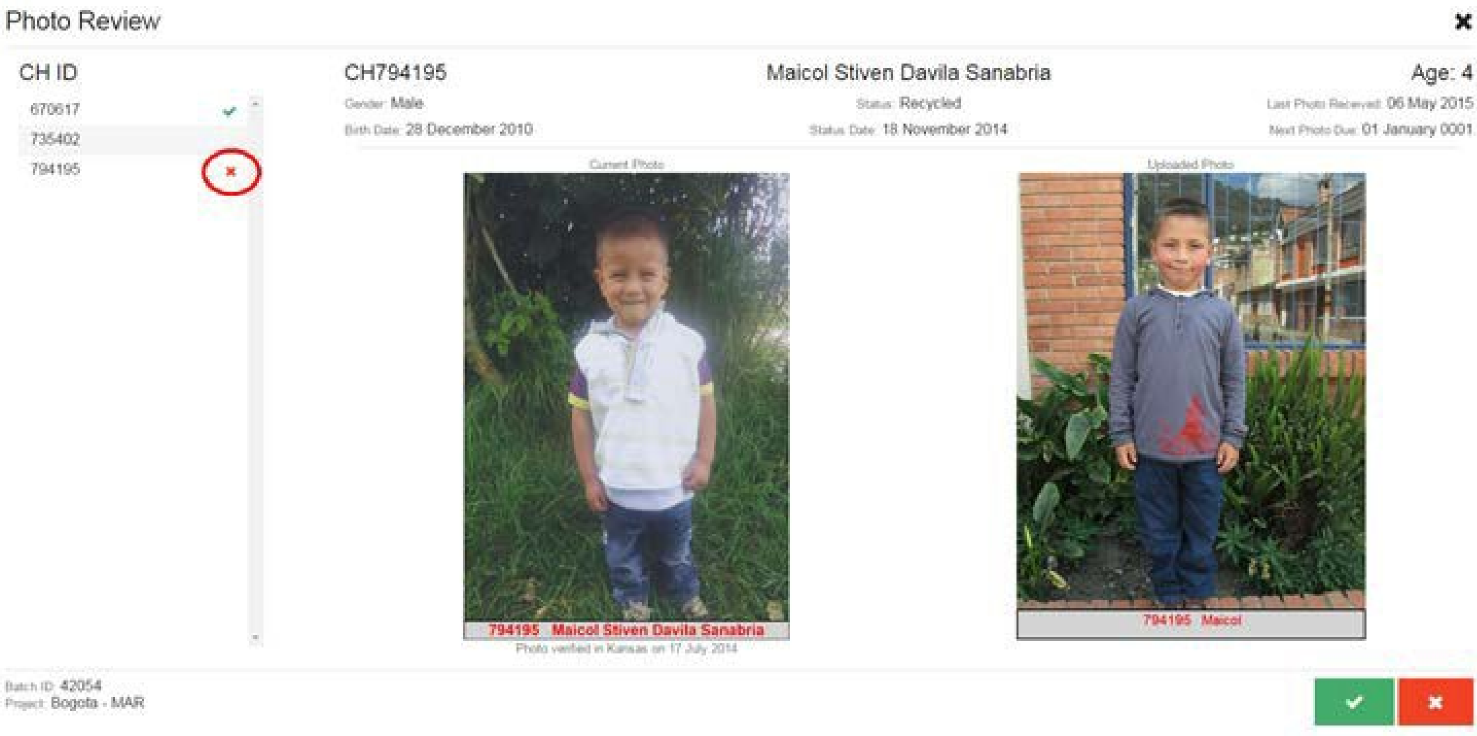
If the photo is of bad quality, is of the incorrect person, is a duplicate photo of the previous annual photo, or has another issue, the photo should be declined. To decline the photo, click the red x button in the lower right-hand corner:



The Decline Photo window will open. It is required to enter a reason for declining the photo. It is optional to enter a comment unless the reason, "Other" is selected, in which case a comment is required:

After selecting a reason, click the Save button:

The CH ID whose photo was just declined now appears with a red x in the list on the left, indicating that it was declined:



After all photos in a batch have been approved or declined, the declined photos will appear on the Photos Declined by Project report and will not be sent to Kansas until they are corrected, uploaded again and approved by the project.

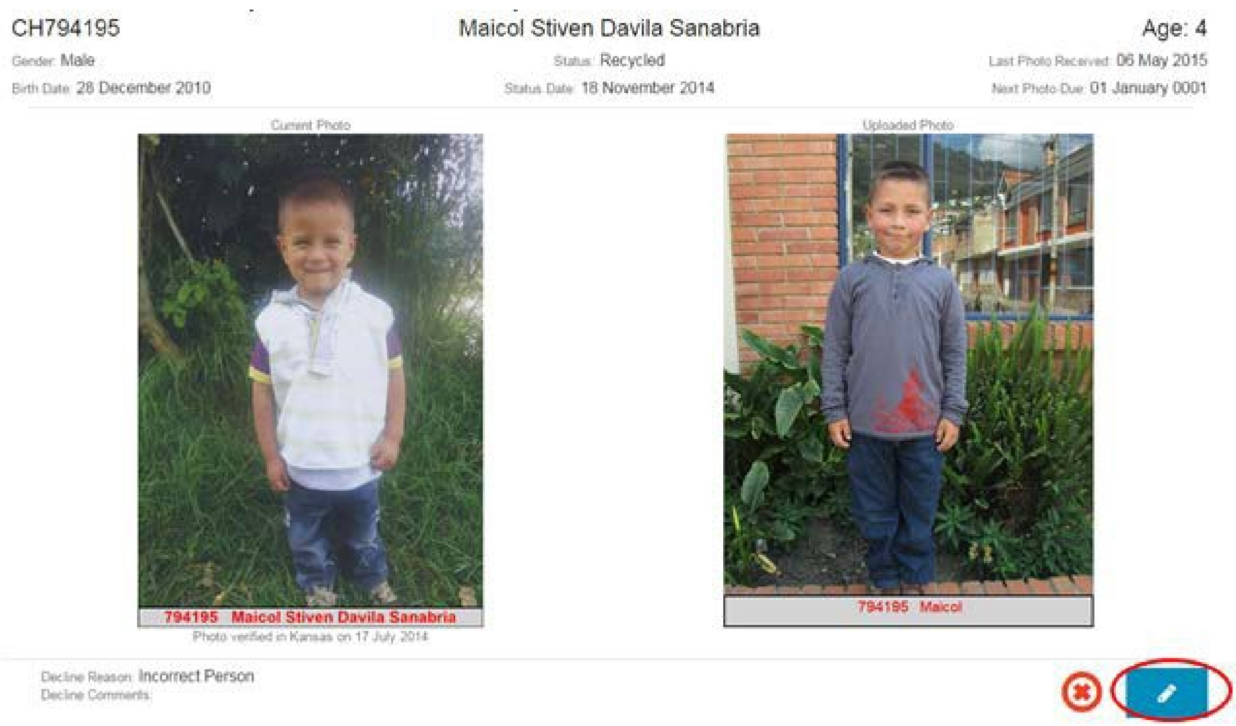
8.6.3.4 Editing the approve or decline action after a photo is reviewed

Once a photo is approved or declined, the review action can be changed as long as the photo was not the last one in the batch to approved or declined. This means if a photo was accidentally approved, it can be subsequently declined. If a photo was declined, it can be subsequently approved or the decline reason can be changed. After all photos in a batch have been reviewed, the review action can no longer be changed.

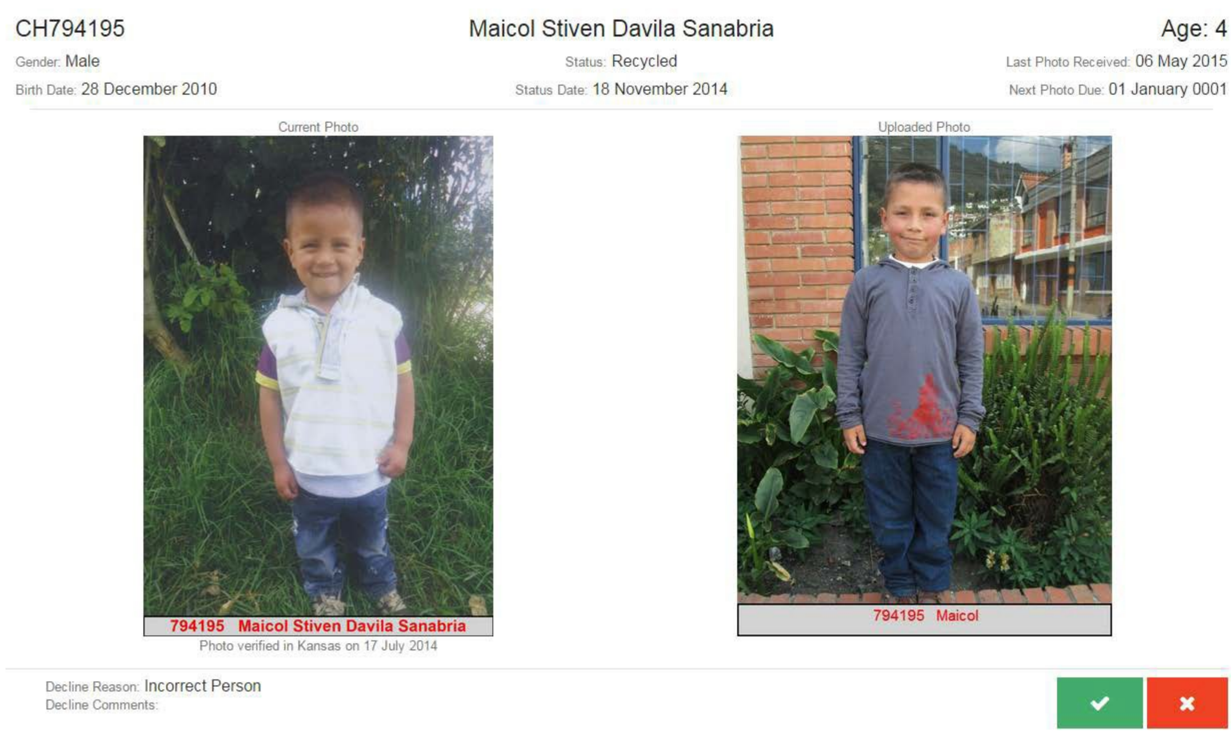
If a photo was approved that should really be declined, click the blue pencil icon:

This will make the red decline button appear again, and the photo can now be declined:

If a photo was declined that should really be approved, or if you would like to change the decline reason of a photo, click the blue pencil icon:



This will make the green approve icon appear so the photo can be approved. If the photo should be declined with a different reason, click the red decline icon to select a different reason:



8.6.3.5 Completing the review of a batch of photos

Once all of the photos in a batch have been approved or declined, it is no longer possible to view the photos on the Upload Photos tab or the Review Photos tab. All of the approved photos will automatically be sent to Kansas for verification. All of the declined photos will appear on the “Photos Declined by Project” report.

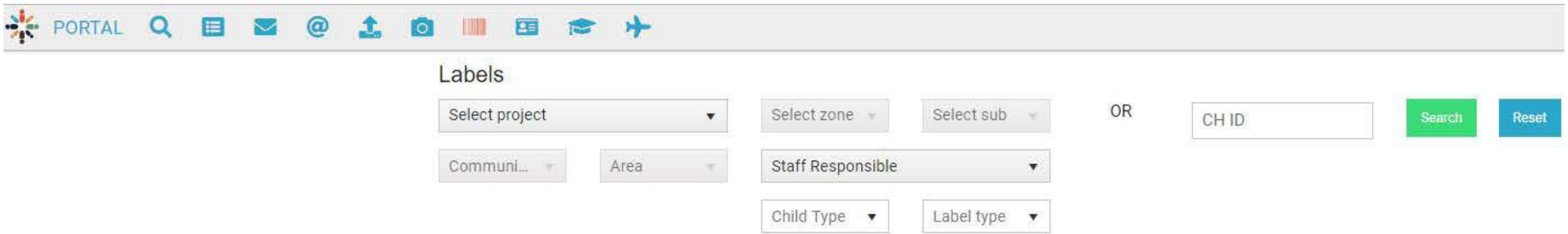
8.7 Sending a Corrected Photo to Kansas after It Was Declined

Photos that are declined by Kansas will appear on the Photos Declined by Kansas report. To send a corrected photo to Kansas, please upload it through the Photos page of Portal. Once the photo is reviewed and approved by the project, it will no longer appear on the current month report within one hour.

If a photo was declined in error, please send an email to CSUpdateRequests@unbound.org with the CH ID to explain that the photo is accurate (a separate email must be sent for each case).

- If the photo was declined for being the “incorrect person” and the photo is the correct person, please state this and, if possible, explain the change in appearance that may have caused the photo team to determine that it was not the same person as the previous year’s photo.
  - If the previous photo was incorrect, please identify who is pictured in the original photo. This will allow us to contact the sponsor to explain what has happened.
- If the photo is declined for “Does not match family record,” please explain why (this is usually an error on the family record: an incorrect gender, wrong year of birth, etc.) and either attach an updated record with the necessary revisions or request the corrections in the email.

9 Labels



9.2 Labels Access

The Labels page is available to Portal users with the role of Coordinator, Project Admin, Correspondence Staff and Social Worker, Lead Accountant, Assistant Accountant and Internal Translator. The project will be defaulted in the “Select Project” drop-down menu for all users. If the user only has access to one zone, the zone will be defaulted in the “Select Zone” drop-down menu. Otherwise, to select a subproject, the user will have to either select a zone or “None” in the zone drop-down menu to see search results from only one zone. If the user only has access to one subproject, the subproject will be defaulted in the “Select Subproject” drop-down menu. Otherwise, the user will have to select a subproject to see search results from only one subproject.

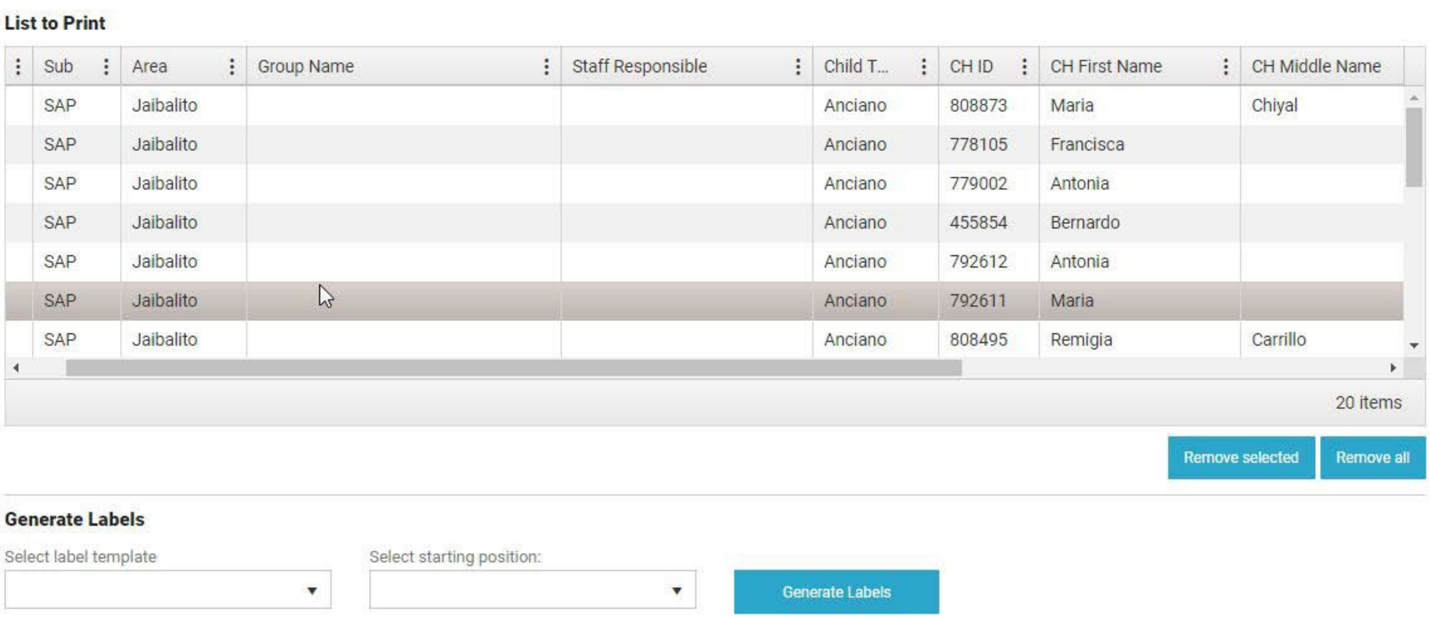
9.3 Label Search Options

The following search filters are available:

- Project
- Zone
- Subproject
- Community Group
- Area
- Staff Responsible
- Child Type: this is an optional search field but can be used to limit the search results to only Children, Aging or Vocation if desired
- Label type: this is a required search field with the following options:
    - Regular: Selecting this option will show all currently sponsored members within the project, zone, subproject and/or child type selected **who have already had a welcome letter credited in Kansas**
    - Welcome: Selecting this option will show all currently sponsored members within the project, zone, subproject and/or child type selected **who have not yet had a welcome letter credited in Kansas**

- List of CH IDs: to create a label for a specific CH ID, type the CH ID, for example, 123456 and click Search. To create a list of labels for specific CH IDs, type several CH IDs separated by a comma, for example: 123456,123457,123458 then click Search. If the CH ID(s) belong to a project, zone or subproject to which you have access, it will be added to the list to print. It is not necessary to include a space after the commas, and there should be no comma or space after the last CH ID entered. It is also possible to copy and pasted a list of CH IDs from Excel as long as there is a comma after each CH ID. For more information about how to copy and paste a list of CH IDs from Excel, please see this video: https://drive.google.com/file/d/1wZqCtN1r2evzgUdrqpthLL1CI4PvzX3E/view?usp=shari ng
- By using the CH ID search field, it is possible to print a label for a retired child with the information of his/her most recent sponsor.
- It is not possible to print a label for a child in change of sponsor status because letters are not required for these beneficiaries. If you need to send a letter for a child in change of sponsor, please send it separately to the attention of your Project Specialist, as these letters are not automatically processed in Kansas if they are included with all other letters.
- Please note: it is not possible to add the same CH ID more than once to the list of labels to print. If you need to print more than one label for the same CH ID, you will need to generate and print two separate lists of labels.
- Search button: once you have selected the desired search criteria, click the Search button. The labels that match the search criteria will be added to the List to Print of labels below. To add more labels to the List to Print, simply change the search filters and click Search again, and they will be added to the bottom of the list.
- Reset button: to reset the search filters to their default values, click the Reset button. Please note, the Reset button resets the search filters but does not clear the List to Print of labels.

9.4 List to Print



Sub	Area	Group Name	Staff Responsible	Child T...	CH ID	CH First Name	CH Middle Name
SAP	Jaibalito			Anciano	808873	Maria	Chiyal
SAP	Jaibalito			Anciano	778105	Francisca	
SAP	Jaibalito			Anciano	779002	Antonia	
SAP	Jaibalito			Anciano	455854	Bernardo	
SAP	Jaibalito			Anciano	792612	Antonia	
SAP	Jaibalito			Anciano	792611	Maria	
SAP	Jaibalito			Anciano	808495	Remigia	Carrillo

9.4.1 List to Print grid

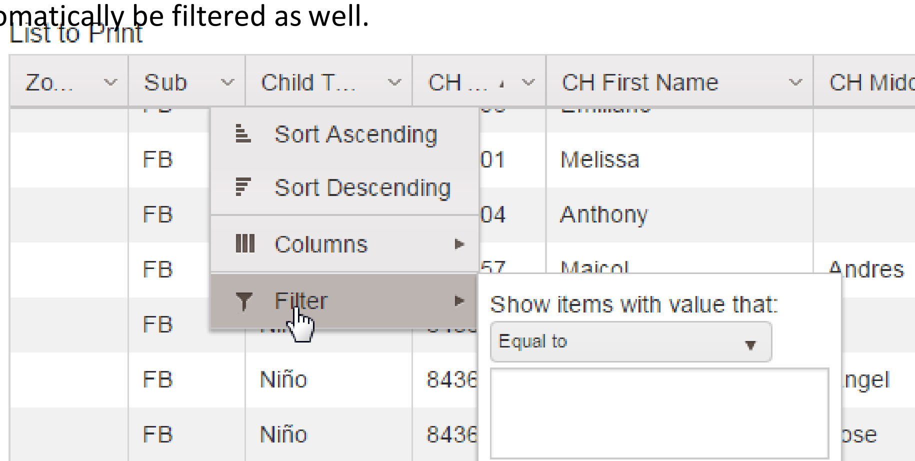
After completing a search for labels, the labels that meet the search criteria appear in the List to Print grid with the following columns:

- Zone
- Sub
- Area
- Group Name
- Staff Responsible
- Child Type
- CH ID
- CH First Name
- CH Middle Name
- CH Last Name
- Sponsor ASC ID (this is the ASC ID of the corresponding sponsor if the child has both a corresponding sponsor and a paying sponsor)
- Sponsor (this is the name of the corresponding sponsor if the child has both a corresponding sponsor and a paying sponsor)

The number of labels in the list to print displays in the lower right-hand corner.

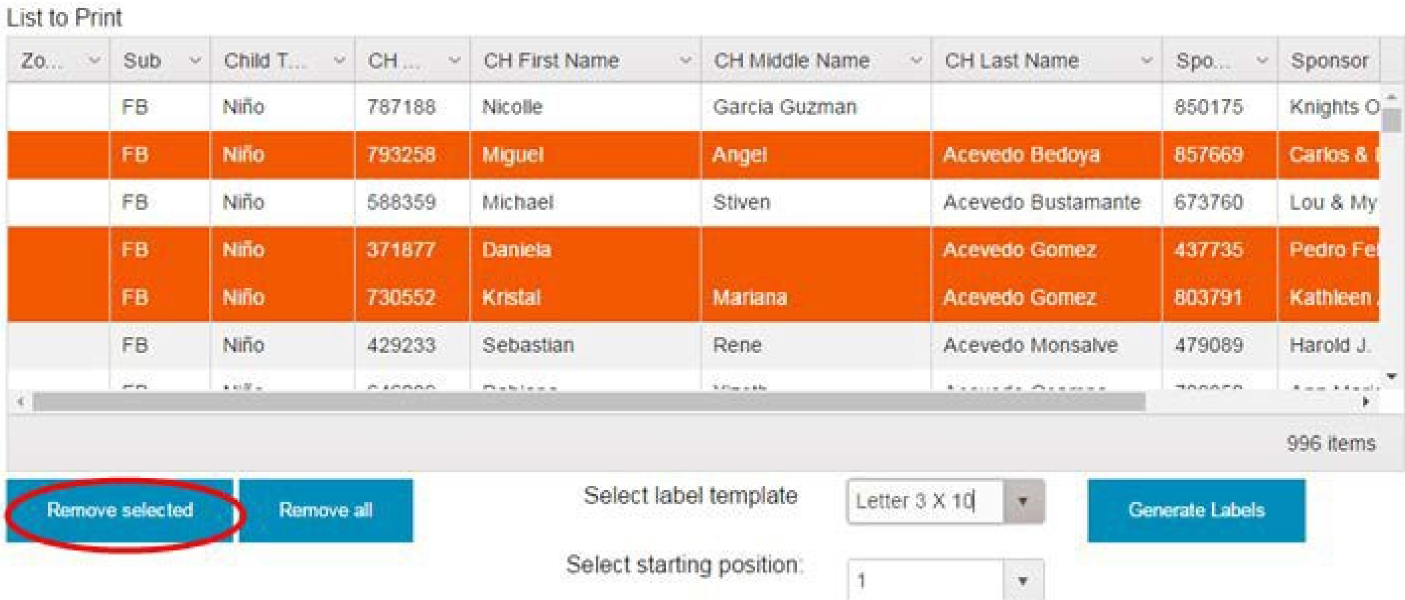
9.4.2 Sorting and filtering the list to print

- Sorting: After completing a search for labels, the labels are added to the list to print in alphabetical order by the child's last name. You can sort by any column in the list to print by clicking once on the column header to sort in ascending order. Click on the same column header again to sort in descending order. If you perform additional searches and do not remove all labels from the list to print, the additional search results will be added to the bottom of the list sorted by the column you selected, but the entire list of labels to print will not be sorted unless you sort them again.
- Filtering: You can also filter the results in the list to print by clicking on the arrow at the top of a column, then selecting Filter and entering the criteria by which you want to filter. If you perform additional searches with a filter applied, the new search results will automatically be filtered as well.

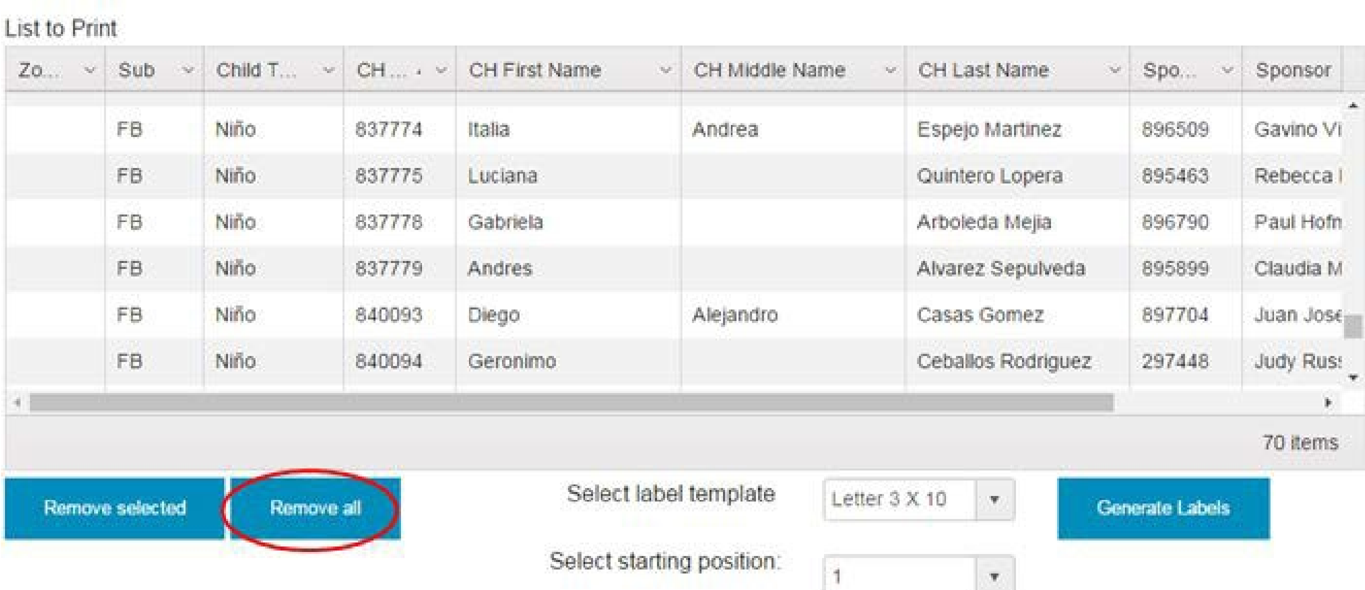


9.4.3 Removing selected labels or removing all labels from the list to print

- Remove selected labels: to remove one label from the list to print, select that row and click the “Remove selected” button. To remove multiple labels, select one row, press the Control key on your keyboard, select additional rows, then select the “Remove selected” button. To remove a series of label rows, select one row, press the Shift key on your keyboard, then select another row. This will select the first row you selected, the last row you selected, and every row in between. Click the “Remove selected” button to remove all selected rows.



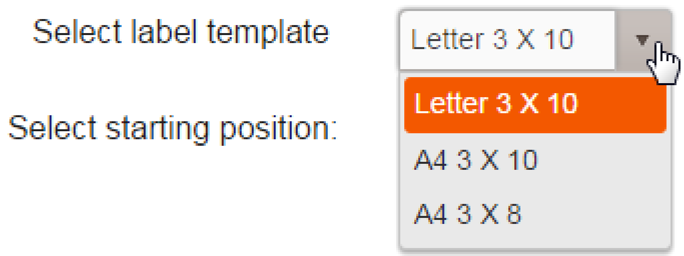
- Remove all labels: To remove all labels from the list to print, click the “Remove all” button.



9.5 Generating the PDF Document of Labels

9.5.1 Select label template

To generate the list of labels to print, select the label template that your project uses. If you are uncertain which template your project uses, please verify this with a teammate or your regional team in Kansas.



9.5.2 Select starting position

The “Select starting position” field allows you to select on which label on the page you would like to start printing. For example, if you have already used 5 labels on a page, select 6 as the starting position to start printing on the 6th label. Please note that the starting position follows the order on the following pages. The labels are numbered vertically starting with the first column, not horizontally across rows.

Starting position for Letter 3x10 and A4 3x10 formats:

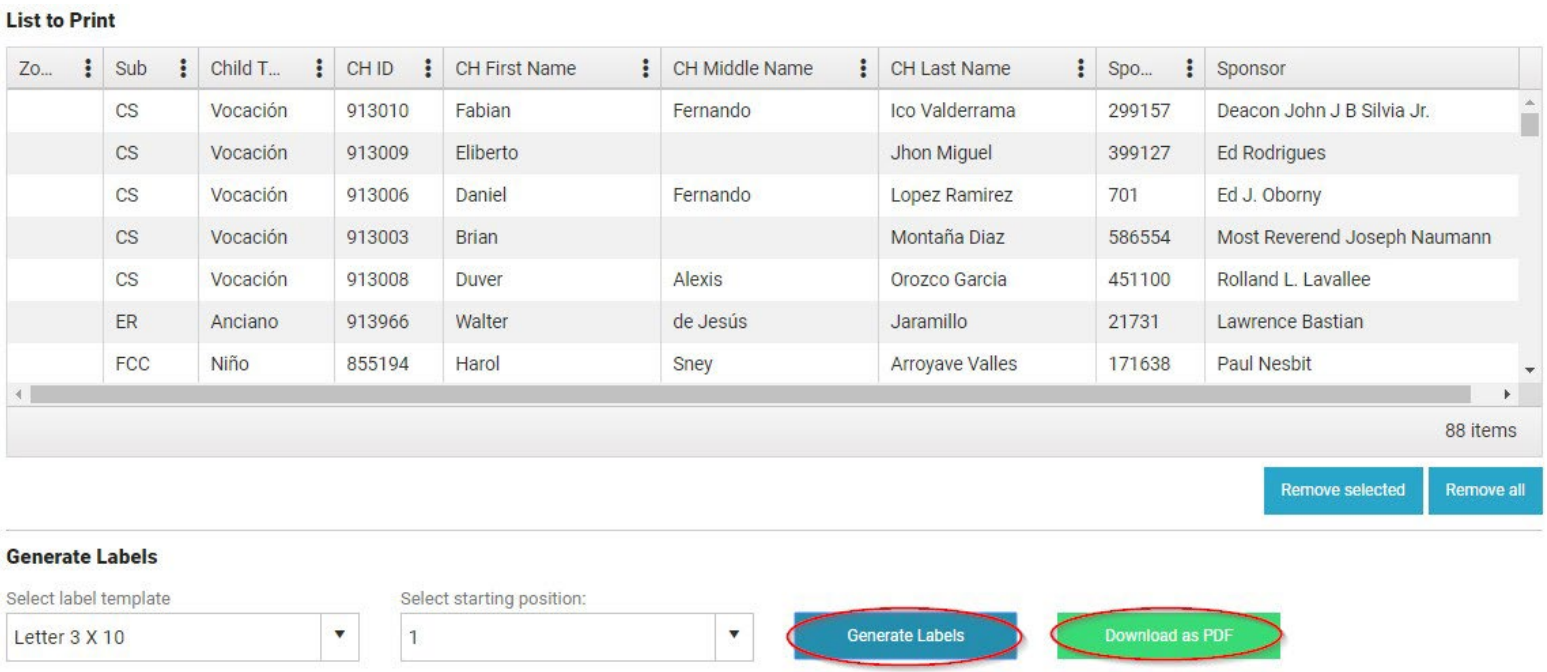
1	11	21
2	12	22
3	13	23
4	14	24
5	15	25
6	16	26
7	17	27
8	18	28
9	19	29
10	20	30

Starting position for A4 3x8 format:

1	9	17
2	10	18
3	11	19
4	12	20
5	13	21
6	14	22
7	15	23
8	16	24

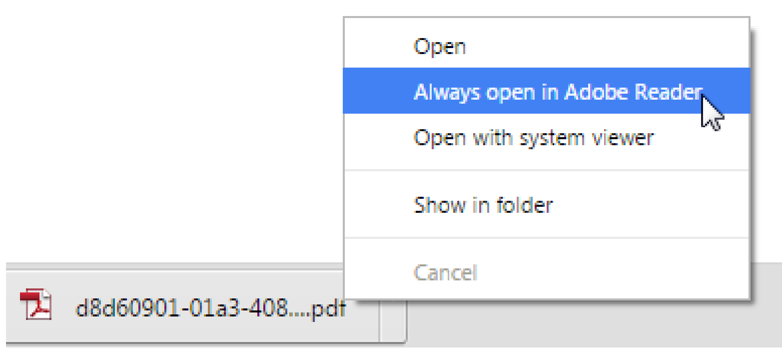
9.5.3 Generate labels to PDF document

After you have reviewed the labels on the list to print and selected the label template and starting position, click the Generate Labels button. A Download as PDF button will appear below the labels grid:



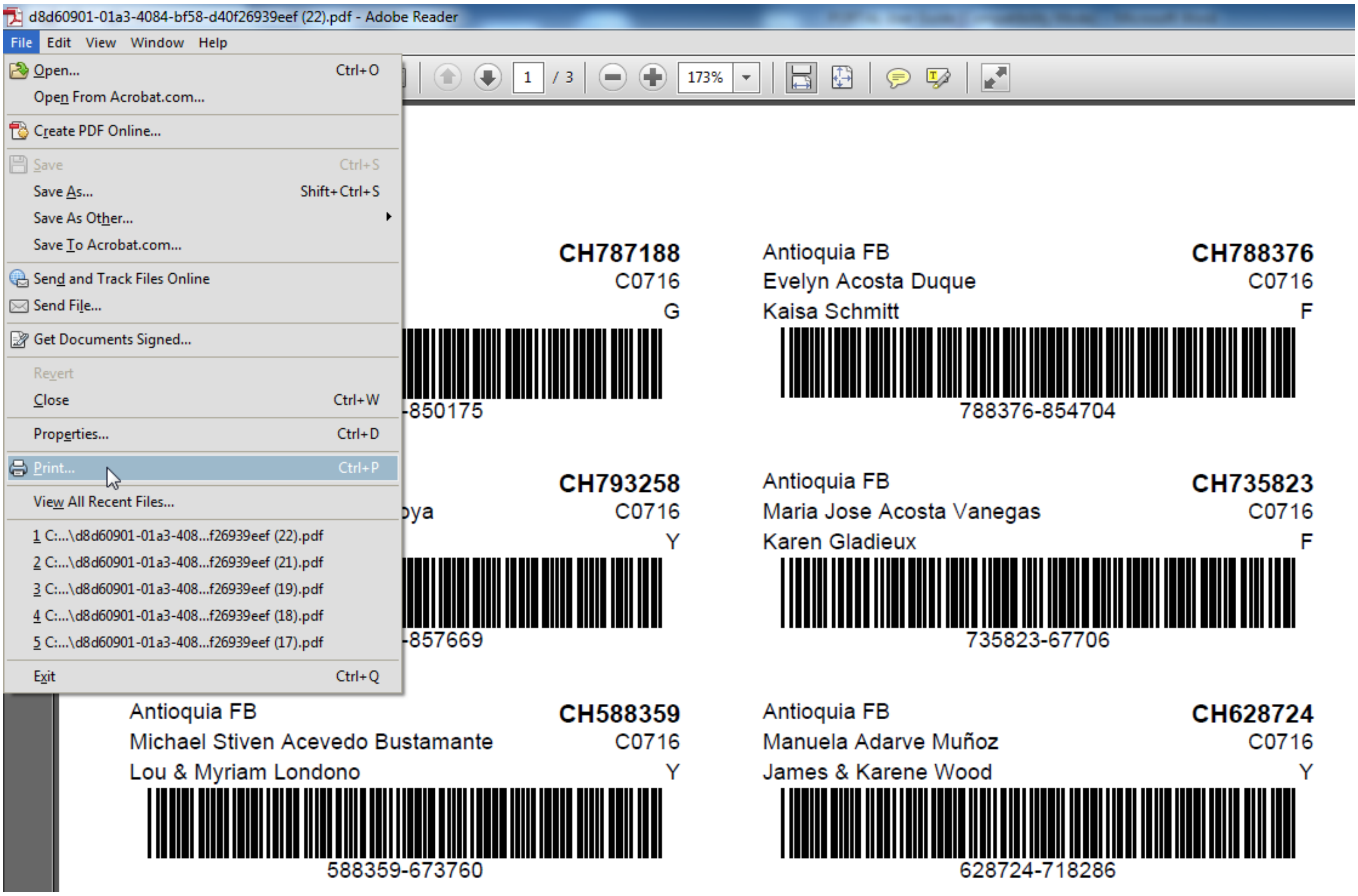
Zo...	Sub	Child T...	CH ID	CH First Name	CH Middle Name	CH Last Name	Spo...	Sponsor
	CS	Vocación	913010	Fabian	Fernando	Ico Valderrama	299157	Deacon John J B Silvia Jr.
	CS	Vocación	913009	Eliberto		Jhon Miguel	399127	Ed Rodrigues
	CS	Vocación	913006	Daniel	Fernando	Lopez Ramirez	701	Ed J. Oborny
	CS	Vocación	913003	Brian		Montaña Diaz	586554	Most Reverend Joseph Naumann
	CS	Vocación	913008	Duver	Alexis	Orozco Garcia	451100	Rolland L. Lavallee
	ER	Anciano	913966	Walter	de Jesús	Jaramillo	21731	Lawrence Bastian
	FCC	Niño	855194	Harol	Sney	Arroyave Valles	171638	Paul Nesbit

Click on the Download as PDF button to open the PDF document of labels. A PDF document will download to your computer and display in the lower left-hand corner of Google Chrome. When you click on the document, it will either open in Adobe or in a separate tab of your Google Chrome browser. It is recommended to open the document in Adobe and print it from there. To always open the PDF files in Adobe, right-click on the downloaded file and select "Always open in Adobe Reader." You should only have to do this step for the first PDF document you download, not for subsequent files. Then click on the document to open it.

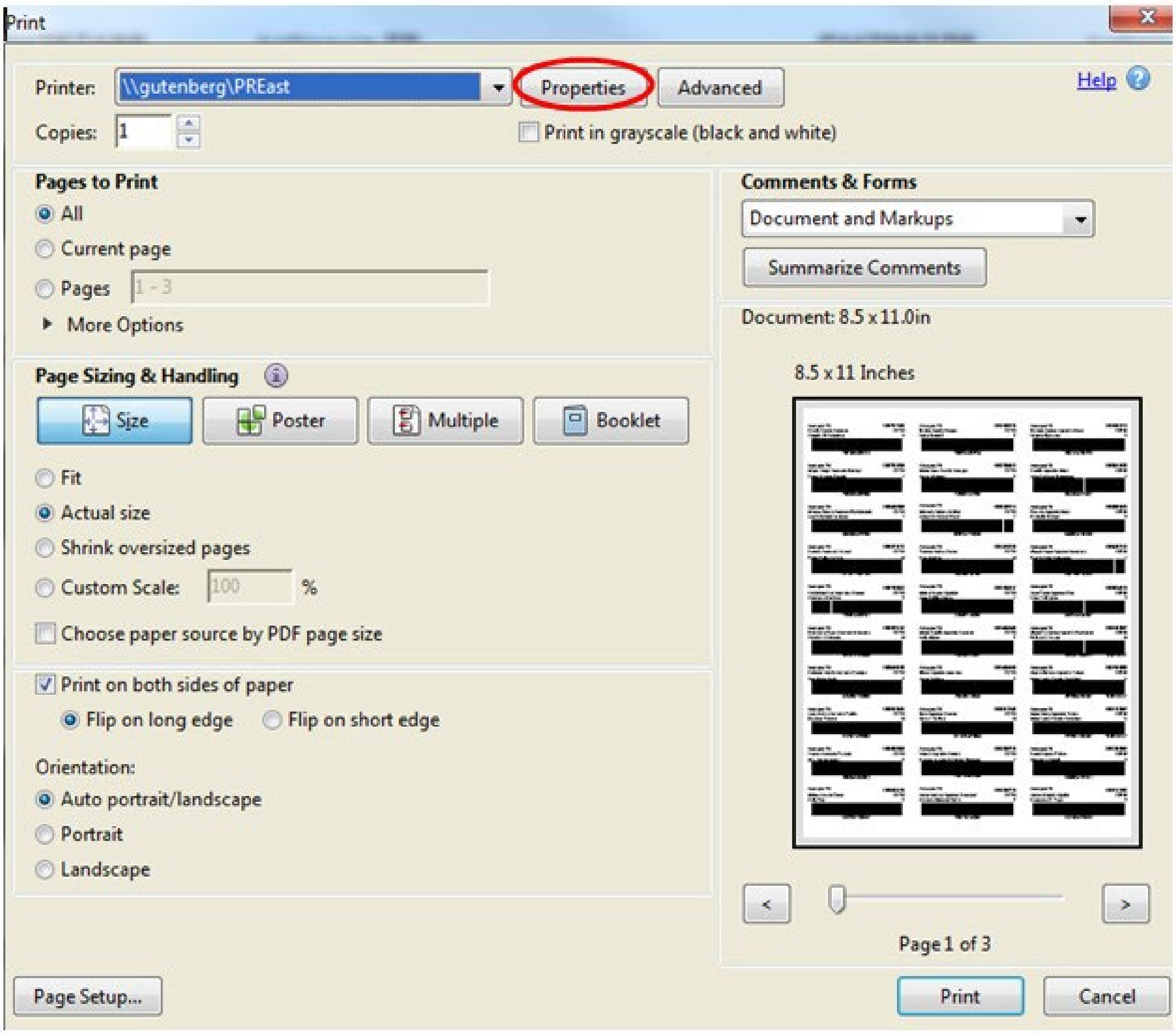


9.5.4 Printing the PDF document of labels

Once you have opened the PDF document in Adobe, review it to make sure it has the labels you were anticipating. Then, select File -> Print:

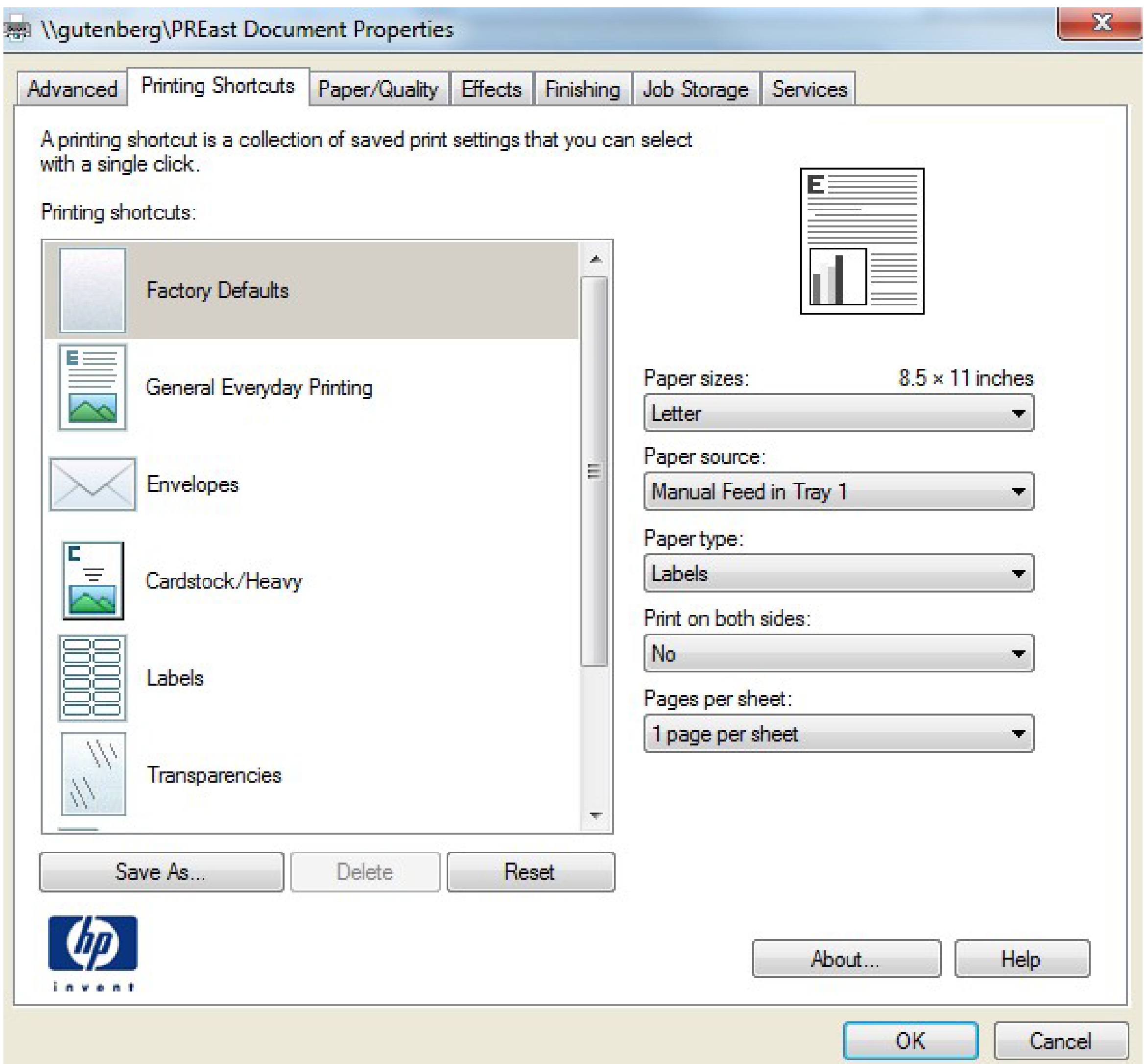


The settings you select on the Print window will depend on your local printer, label template, etc. It is possible that you will need to select the Properties button to select additional options:



In Kansas, we select the following settings to print labels, but **your local settings may vary**:

- Paper size: Letter (In India, Kenya, Tanzania and Uganda, you will select A4)
- Paper source: Manual Feed Tray (if you load the label paper in the printer like regular paper, you would not need to select this)
- Paper type: Labels (you may also leave the default setting but selecting Labels means that the printer will heat up more when it prints and the ink adheres better to the labels)
- Print on both sides: No



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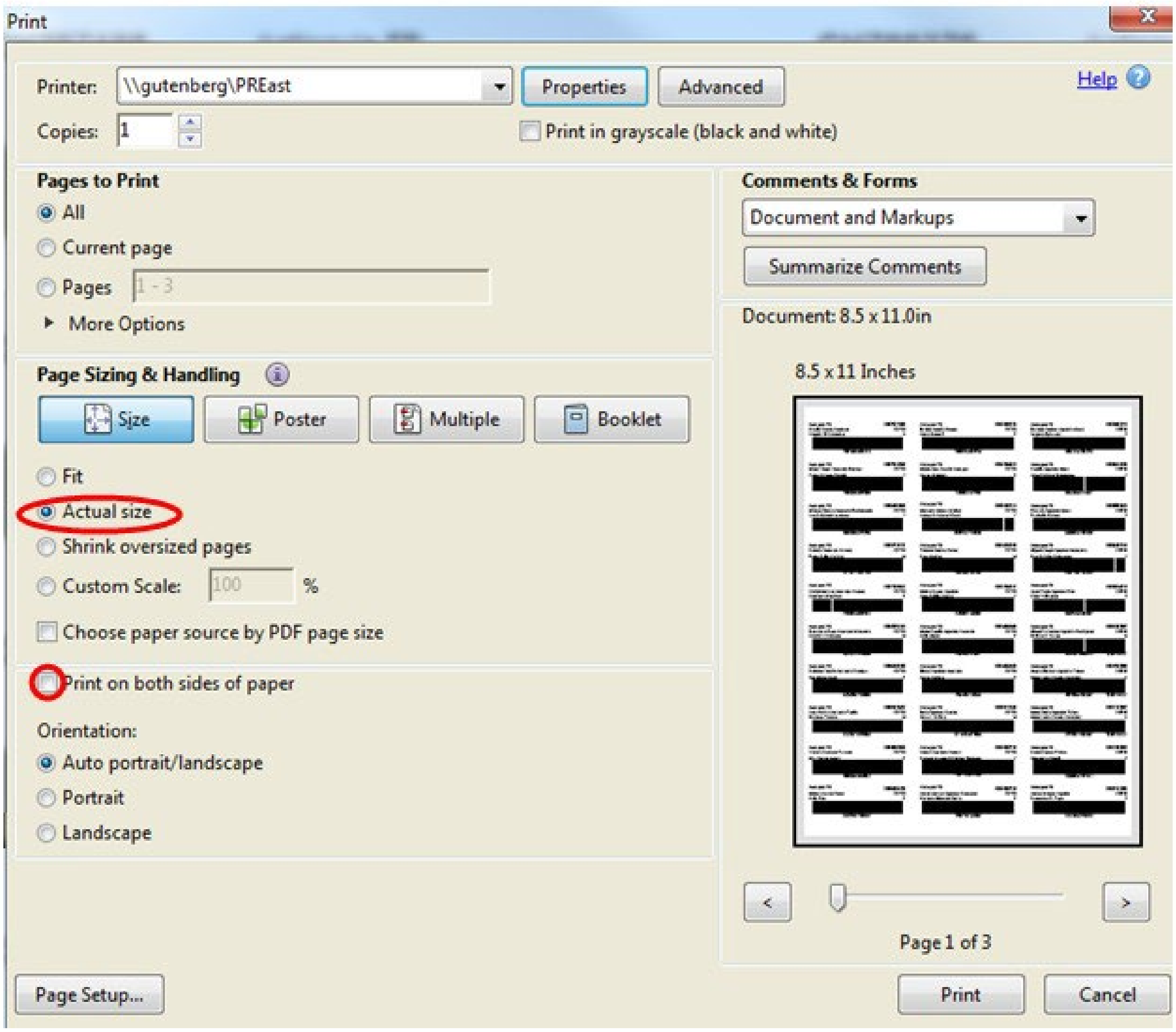
After selecting any additional settings under the Properties button, review the settings on the Print window:



Ensure that Actual size is selected, and that Print on both sides of paper is **not** selected. Ensure that label paper is loaded correctly in the printer and click Print.

After printing the labels, if you would like to print more labels, click the "Remove all" button to remove all labels from the List to Print so that you do not print the same labels again.

9.5.5 Reviewing label quality

As always, before placing labels on letters and sending them to Kansas, it is important to review the following:

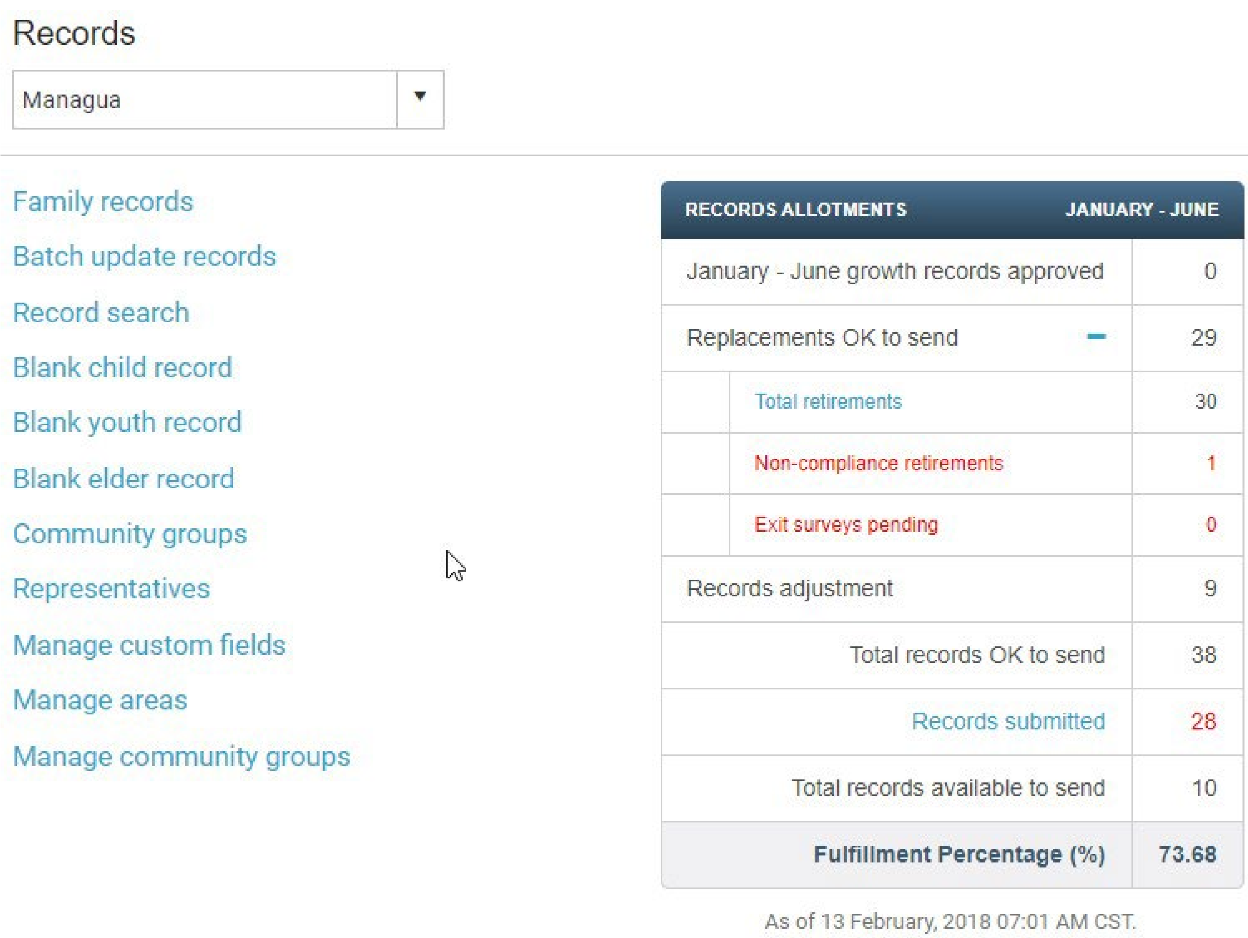
- All of the information on the label, including the barcode, is printed correctly and within the margins of the labels
- The ink is not too light
- The barcode is not blurred or smudged
- The ink on the labels does not scratch or rub off easily

9.5.6 Sending letters with labels printed from Portal to Kansas

When printing labels from Portal from a new or different printer the first time, we ask that you send small quantities of letters with labels printed from the new printer at first to ensure that they can be scanned successfully here. Please send no more than 50 letters with labels printed from the new printer at first, and send them in a separate envelope indicating that they have been printed from a new printer. We will then communicate if these labels were scanned successfully, and you can print labels as normal from this printer.

10 Records

The Records home page shows links to other pages related to family records functionality. Your access to Portal determines what you will see on this page. All users will see the links to these pages: Family records, Batch update, Record search, Blank child record, Blank youth record, Blank elder record, Community Groups and Representatives. Project Admins will also see links to these pages: Manage custom fields, Manage areas and Manage community groups. All top-level project users will see the Records Allotment table for their project.

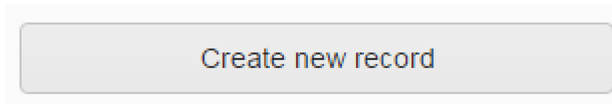


10.1 Family Records Page

The Family Records page is where users can create new or update existing family records and send them to Kansas. All roles in Portal will be able to view records from projects, zones and subs to which they have access. Coordinators, Social workers, Correspondence staff, and Project Admins will have the ability to modify records. All records must be reviewed by a top-level project staff before being submitted to Kansas.

10.2.1 Creating a new record

To create a new record click on the Create new record button in the right-hand corner:



Last modified date

Each section of the record has a last modified date that indicates when that section was last updated. If any of the fields in a section is modified, the last modified date for that section is updated. However, the last modified date of each specific field is not tracked, only the section as a whole.

Record format

All information that is typed in all sections of the record should include initial capitals only, while capitalizing proper nouns and acronyms as appropriate. Please do not enter information in all capital letters.

Correct example:

Basic Information

Last modified:

Record ID	CH ID	Type	Child status	Record Status
		Child		In Progress
Project	**Zone**	**Sub**	**SL/UR number**	
Antioquia	None	AC	SL/UR number	
Area	**Community group**	**Staff responsible**		
Select area	Select community group	Select staff responsible		
First name	**Middle name**	**Last name**	**Likes to be called**	
Ana	Rebeca	Castro Agila		

Gender	Birth day	Birth month	Birth year	Estimated?	Age	Consent
Female	10	March	2010	☐	7	Yes

Incorrect example:

Basic Information

Last modified:

Record ID	CH ID	Type	Child status	Record Status
		Child		In Progress
Project	**Zone**	**Sub**	**SL/UR number**	
Antioquia	None	AC	SL/UR number	
Area	**Community group**	**Staff responsible**		
Select area	Select community group	Select staff responsible		
First name	**Middle name**	**Last name**	**Likes to be called**	
ANA	REBECA	CASTRO AGILA		

Gender	Birth day	Birth month	Birth year	Estimated?	Age	Consent
Female	10	March	2010	☐	7	Yes

Claimed by

Claimed on

Basic Information section

- Record type: the record type selected will determine the fields that display on the record, as the fields vary slightly by record type.
- Required fields: the fields required in this section are Type, Project, Zone (select none if your project does not have zones), Subproject, First name, Gender, Birth day, Birth month, Birth year and Consent. If the exact birthdate is not known, please estimate the birth day, month and year and check "Estimated?".
- Optional fields: Area, Community group and staff responsible are optional fields that your project may use if they are helpful to you. Your Project Admin can create Areas and Community Groups. An area is an entity smaller than a subproject if your project has the need to separate beneficiaries into smaller groups. Community groups are mothers groups/parent groups/self-help groups. The staff responsible is the person on the Unbound staff who works most closely with the family. All Portal users except accountants with access to the selected project, zone and sub will display in this menu. Likes to be called should only be completed if the person is commonly called something other than his/her first name in his/her daily life, not just family nickname.
- SL/UR number: If a new or replacement record is being created in response to a Speed Letter, select the Speed Letter number from this drop-down menu. For existing records, if a record is being updated in response to an Update Request, select the Update Request number from this drop-down menu.
- Show basic information history: if the project, zone, subproject, name, likes to be called, or date of birth fields are updated, the previous values of these fields will show in this section along with the date on which those values took effect.
- Show comments: All comments related to the record appear here, including general comments, declined record comments (if the record was declined by Kansas at some point) and problem record comments (if the record was saved as a problem record by the project at some point). It is possible to add a general comment by clicking "Show comments" then adding and saving a comment. General comments can be used for any purpose the project would like, such as communicating between the subproject and project about changes made to the record.
- Once the required fields on the basic information section are completed, the record can be saved and the Record ID will be assigned. The CH ID will not be assigned until the record is submitted to Kansas and it is processed.
- After saving the Basic Information section, the record will automatically be claimed to the current user (see "Claim/Unclaim records" under "Editing an existing record" below). The "Claimed by" and "Claimed on" fields can be seen after the Basic Information section is saved.
- Duplicate record check: After saving the Basic Information section, Portal will check for possible duplicate records. If a record from the same project for a person with the same name and a birthdate within two years of the saved record is found, a warning will display the name and Record ID of the potential duplicate record. If this is truly a duplicate record, the new record should not be saved, and you should instead update

the existing record. If a record with the exact name, subproject and birthdate is found, Portal will not allow the new record to be saved as this is an exact duplicate record.

Background section

- Required fields: Address, Village/town/neighborhood, Jobs at home, What is your favorite thing to do?, Languages spoken, Health status, Additional Information, Jobs at home. Languages spoken is a multi-select drop-down field. Click on the drop-down or start typing a language to select one from the list. Select multiple languages if needed. If the child is too young to speak yet, select the languages that the child will likely speak in the future. If the person is unable to speak, select "Unable to speak" and/or "Sign language" if appropriate. Health comments are required if the health status is fair or poor. "What would you like to share about yourself?" is required for the elder record.
- Optional fields: Religion is completely optional. This field is meant as a way to gather data about whether we are including families from different religious backgrounds in our program. If you feel the family would feel uncomfortable by being asked this question, you are not required to ask them their religion.
- Background history: if the address, health comments, or additional information fields are updated, the previous values of these fields will show in this section along with the date on which those values took effect.

Family section

- Required fields: If the mother and father are present, then their first names must be provided. If either the mother or father is not present, his/her first name is not required. If the child lives with a guardian, the first name of the guardian is required. The occupation is required for any person the child lives with. If the mother or father is not present, the "not present" reason is required for him or her. The number of brothers, number of sisters, "What makes this family unique?", Unbound goal and Family's Unbound goal are always required.
- Family history: if the Unbound goal or Family's Unbound goal are updated, the previous values of these fields will show in this section along with the date on which those values took effect.
- Note: the family section is not on the elder record.

Living conditions section

- Required fields: Walls, Floor, Roof, Cooking, Electricity, Water supply, Additional information about the living conditions and/or community, Sleeping, Number of people living at home, Approximate monthly household income (in dollars) and Describe source(s) of income are all required. Walls, Floor, Roof, Cooking and Sleeping are all auto-complete drop-down fields with the option to type in a unique value. If you start typing, for example, "Wood," you will see values that include wood, like wood and plywood. You can select one of these values or type in a value that does not exist in the list. Multiple values can be selected. In the water supply field, please include the source from which the family obtains water and anything they must do to be able to drink the water, such as boiling it or otherwise treating it. “Describe the elder’s past and current means of making a living” and “Elder lives with” are required fields on the elder record.

- Optional fields: If the person sleeps with a mattress, mat or blanket, please select as many of these as apply. If the person shares his/her bed with at least one other person, please select, “Shared.”
- Living conditions history: the previous values of most of the fields in this section are kept in the history section if the values are ever changed, along with the date on which those values took effect.

Special needs section

- Required fields: the question, “Does this person have any physical or mental limitations that will prevent him/her from fully caring for him/herself long-term?” is required for all records. If the person does have limitations, the additional three questions are required.
- Note: the Special needs section does not appear on the Youth record

Education section

- Required fields: Attends school is required for all records. If the person is attending school, all fields in this section except “If not attending school, why?” are required. If the person is not attending school, only the “If not attending school, why?” reason is required. For youth records, if the youth is attending school, the Course of study and Career/Educational goal are required. At least one Anticipated completion date in the Educational program section is required. If an anticipated completion date for Other education is provided, the “Other education” field is required.
- Current grade: this field lists all grades according to your country’s educational system.
- Education history: if the current grade or name of school are modified, the previous values of these fields are kept in the history section, along with the date on which those values took effect.
- Note: the education section is not on the elder record.

Last home visit section

- Optional fields: both fields in this section are optional. Last home visit can be used to keep track of the last time the family was visited. The Subproject notes field can be used to keep any information that you would like to note, such as the notes from the last home visit or anything else. This information will not cross over to the database in Kansas or be shared with the sponsor.
- Home visit history: if the last home visit and subproject notes fields are ever updated, the previous values of these fields are kept in the history section, along with the date on which those values took effect.

Custom fields section

The Project Administrator of each project can create custom fields that the project can use to track information that is important to your project. After custom fields are named (see Manage Custom Fields section), they will appear on the record, and information can be entered in them.

Photo section

For new or replacement records, a photo must be uploaded on the record before the record can be submitted to Kansas. Click the "Select files" button to select a photo from your computer. The photo does not have to be named with the CH ID, since there is not yet a CH ID assigned. The dimensions must be 480 pixels in width by 640 pixels in height. If you select a photo and then need to select a different photo, click on the "Select files" button again to select a different photo.

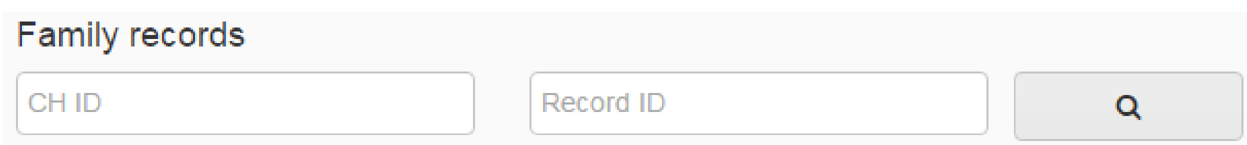
The current photo for records with CH IDs assigned can be viewed on the photo section of the record. However, after a record has been sent to Kansas and is assigned a CH ID, all future photos must be uploaded through the Photos page of Portal.

Attachments section

Attachments related to the child can be added to the record. It is not required to add attachments to a record, but they can be added if it is helpful to keep documents with the record. The file name of attachments can only contain letters, numbers, hyphens, underscores and periods. Spaces are not allowed. Multiple files can be added, but each individual file cannot be larger than 5 MB.

Editing an existing record

To edit an existing record, enter the CH ID or Record ID of the record. Records that have not yet been sent to Kansas will not yet have a CH ID assigned and will need to be accessed using the Record ID.



10.1.2 Claim/Unclaim records

In order to modify an existing record, it is first necessary to claim the record. This reserves the record so that no other users may modify the record at the same time. After you have finished working on the record, click Unclaim to release the record for other users to work on. If you change the status of the record and click Save, the record will automatically be unclaimed.

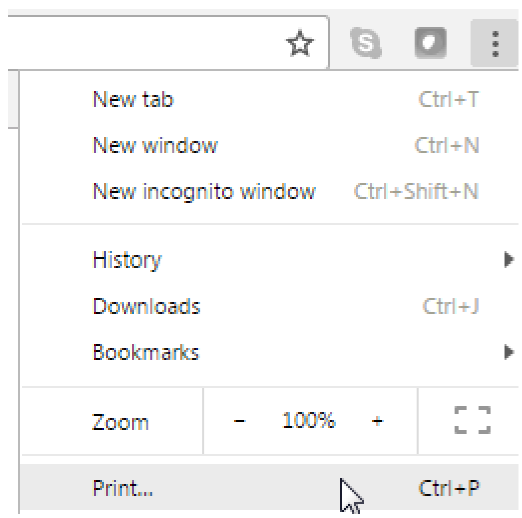
Project Admins have the ability to unclaim records from other users if necessary.

There is an automatic process in Portal that runs every 24 hours, Monday-Friday. This process looks for claimed records that have not had any changes saved in the last 20 minutes. These records will be automatically unclaimed by the system so that records do not inadvertently remain claimed for hours or days.

10.1.3 Printing a record

A record can be printed along with its completed information by clicking on the print button.

The record will display in a printable format in a new browser tab. Click on the three dots in the upper-right hand corner of Google Chrome, then select Print. Select the desired printer to print the record. You can also print to PDF to save a completed record in PDF format.

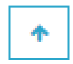


10.1.4 Section navigation links

To navigate directly to a section of the record without scrolling, click on the link of that section at the top of the page.

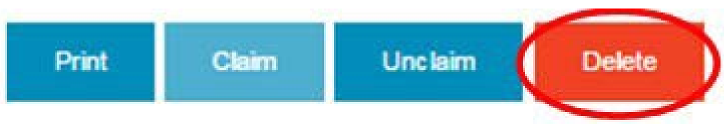
10.1.5 Go to top of page

At the lower right-hand corner of each record, there is an arrow icon. Click on this arrow to go to the top of the record.



10.1.6 Deleting a record

It is possible to delete a record that does not yet have a CH ID assigned in case a record was entered in error or is no longer needed. To do this, first claim the record, then click the Delete button.



10.1.7 Updating the Basic Information section only

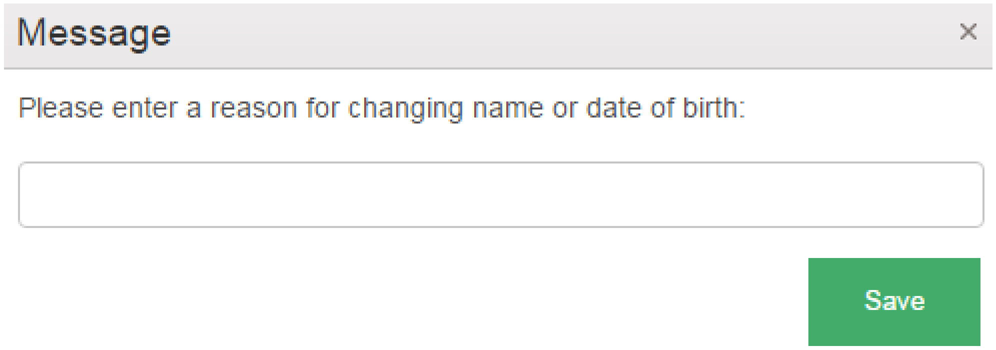
Sometimes it is necessary to change the name, birthdate or subproject on an existing record, but all of the information to complete all sections of the record is not available. In order to update the Basic Information section of the record only, claim the record, then check the "Basic information update only" checkbox. Make the changes to the Basic Information section, then save that section. If Consent is unknown, it is not necessary to change this field to Yes or No. The record will be saved in "Pending project approval" status, and it will be necessary to progress the record through the various statuses to submit the change to Kansas.

It will not be possible to make changes to any other section of the record if the "Basic information update only" checkbox is selected. This checkbox will only be enabled for records with the status of "Processed" or that were previously processed, have had the checkbox checked, and have not yet been submitted to Kansas.

If the "Basic information only" checkbox was selected but it is later decided that updates to the rest of the record are needed, uncheck this checkbox and save the Basic Information section. Claim the record again to make changes to the rest of the record.

10.1.8 Reason for changing the name or birthdate of a record

If the name or birthdate is change on a record, Portal will ask for a reason. This is so we can explain the change to a sponsor if needed.



Portal will not allow a birthdate to be changed by more than three years, and these changes should be sent to your Project Specialist in Kansas.

10.1.9 Changing from a child to youth record

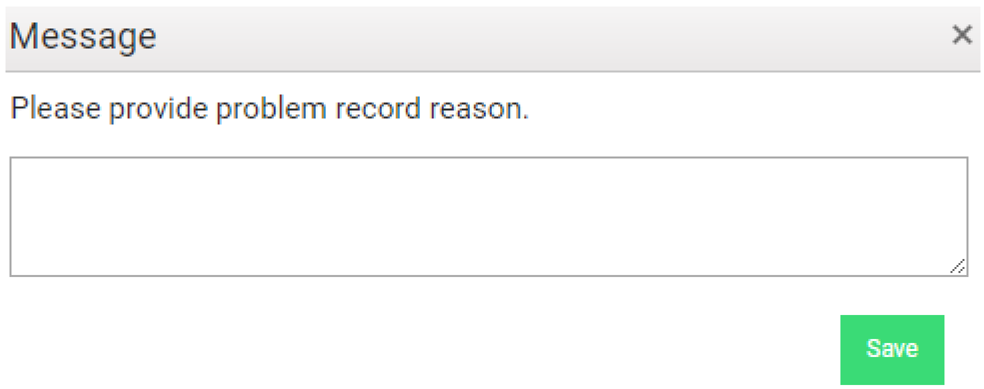
If a child record for someone 13 or older who does not have special needs is claimed, Portal will change the record type to a youth record and ask you to review and update certain fields before submitting the record to Kansas. It is not required to update records unless an Update Request is received, but if a child 13 years or older loses his/her sponsor, Kansas would request a youth record at that time. Portal will change the record type to youth in order to start collecting the appropriate information for children 13 years or older.

10.1.10 Records workflow

All records will follow a workflow and move through various statuses in their lifetime. To change the status of a record, select a status from the drop-down and click Save. A record will automatically be unclaimed upon saving it in a new status. Not all statuses are viewable at one time, and subproject and zone users will not see all statuses:

- In progress: As soon as a record is started, it will be in “In progress” status. Also, if a record has been processed in Kansas and then is updated in the future, it will return to “In progress” to go through the review process again.
- Pending Project Approval: Once all required fields on a record have been completed, a subproject or zone staff member can indicate that the record is ready for project review. It will then be saved in “Pending project approval” status.
- Problem Record: Once the record is reviewed by the project, if any problem is found that cannot be corrected by the project, they will save the record in “Problem record” status, which indicates to the zone or subproject that the record should be corrected. When the record is saved in this status, the user

must enter a problem record reason, which will then appear under the “Show comments button” in the Basic Information history section.

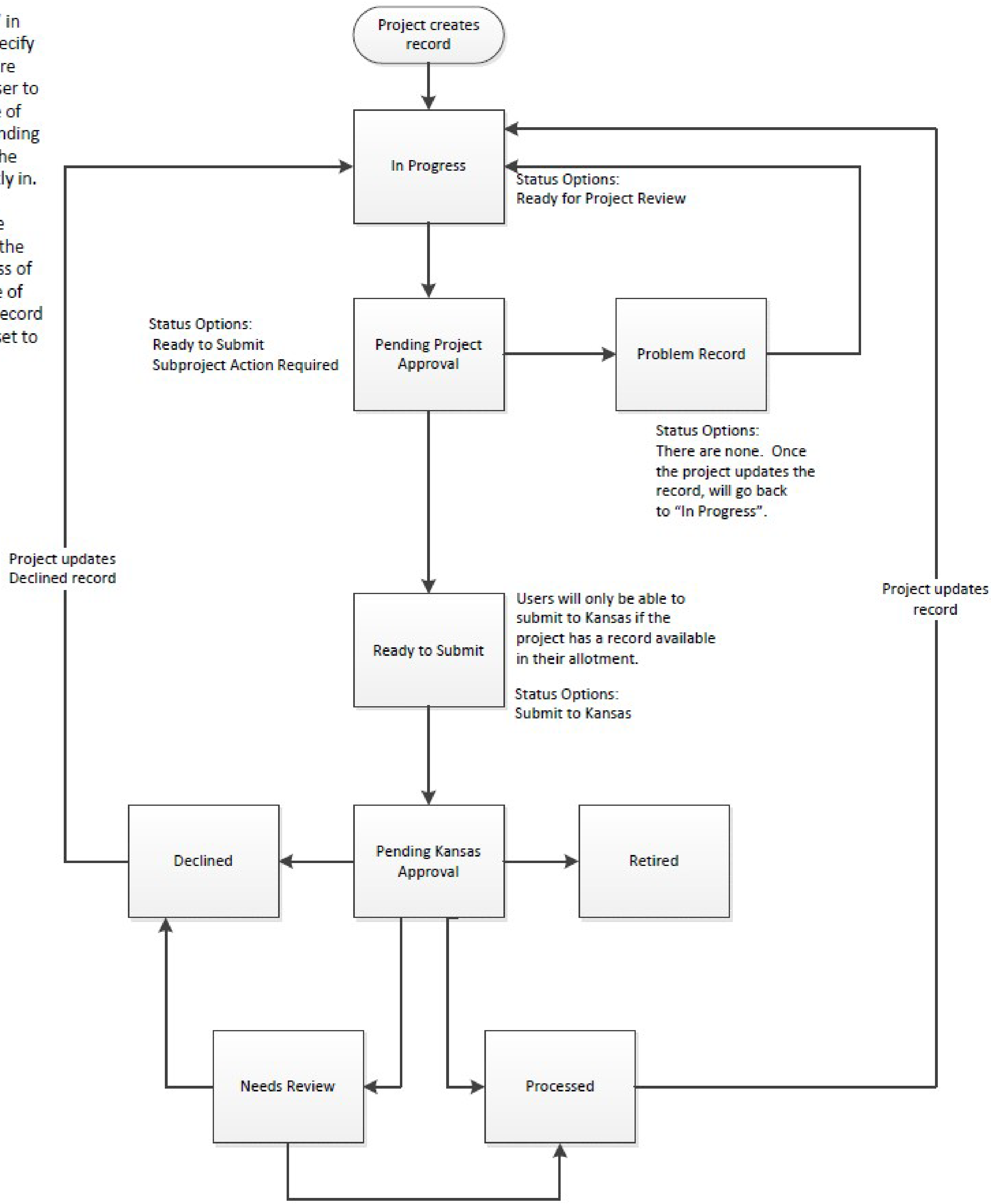


- Ready to Submit: Once the record is reviewed by the project, if no changes are needed, or if the project can make the necessary changes, they will approve the record, and it will be saved in “Ready to Submit” status. This means the record can be sent to Kansas whenever the project has a record available in their records allotment. If a project staff member creates or edits a record, the record does not need to be reviewed by anyone else and will be saved in “Ready to submit” status once all required fields are completed.
- Pending Kansas Approval: Once a record is saved in this status, it will immediately appear in the database in Kansas. It will stay in “Pending Kansas approval” status until it has been reviewed and approved in Kansas. A record cannot be modified in Portal when it is in this status.
- Processed: Once a record has been approved in Kansas, it will be in Processed status until it is updated again at the project, at which point it will return to In Progress status.
- Needs Review: If the reviewer in Kansas has a question about a record, they will mark it as “Needs Review” so another co-worker can look at it.
- Declined: If Kansas finds any problem with the record, such as incomplete or inconsistent information, they will decline the record and it will remain in “Declined” status until the project updates the record and sends it back to Kansas.
- Retired: records of any retired person will have this status.

Records workflow flowchart

NOTES:
"Status Options" in the flowchart specify which statuses are offered to the user to change the state of the record depending on what status the record is currently in.

If at any time the project updates the record, regardless of the current state of the record, the record status will be reset to "In Progress".



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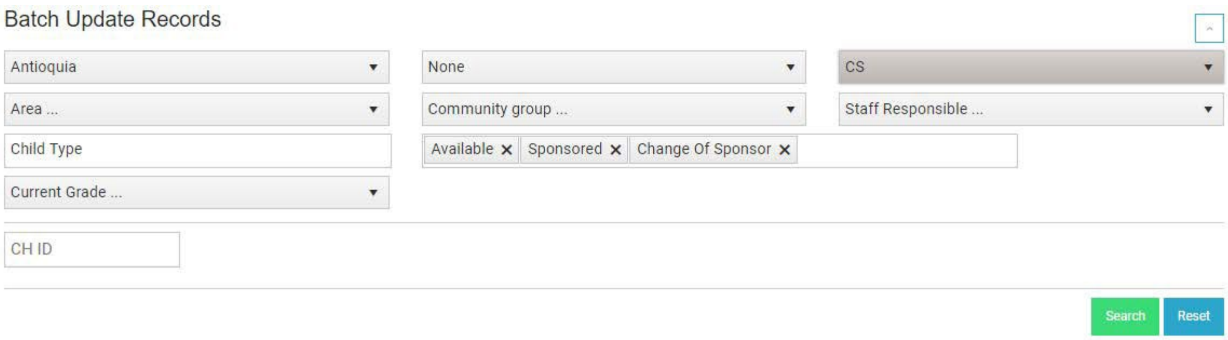
10.2 Batch Update Records

The Batch Update Records page can be used to update certain fields on multiple records at the same time. It is only possible to update records that have CH IDs assigned and that are in a Processed status. The following fields can be updated: Subproject, Area, Community Group, Staff Responsible and Current Grade. If records already have these fields completed, the fields can be changed to different values. If records do not yet have these fields completed, the fields can be populated for the first time using the batch update screen.



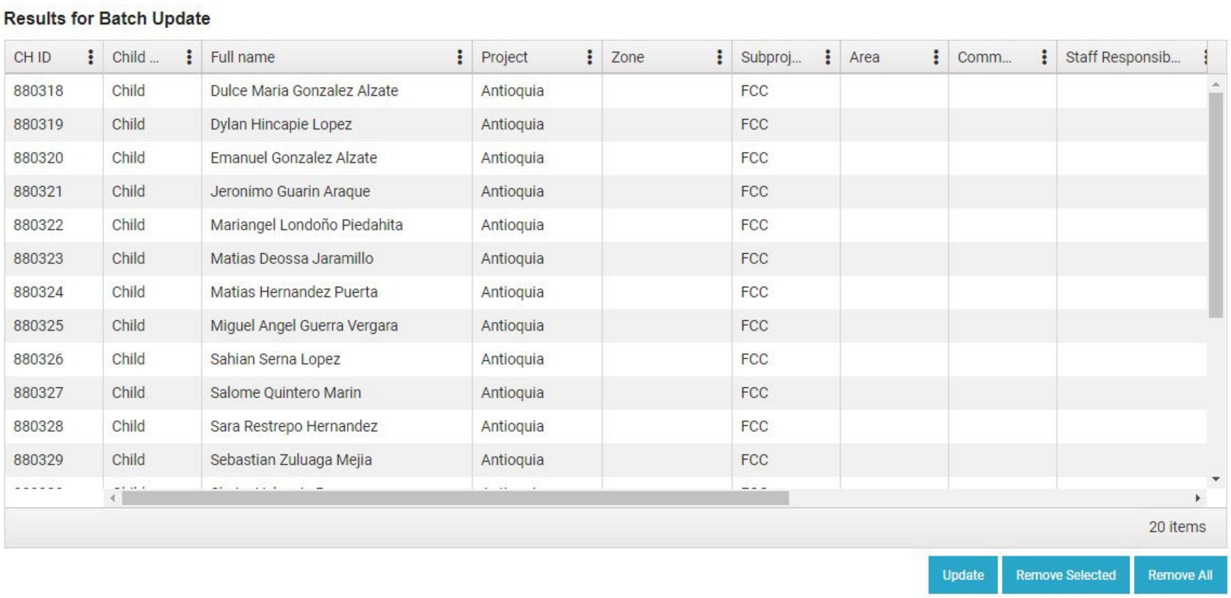
10.2.1 Search filters

Batch updates must be done at the subproject level. If you have more access to more than one subproject, select a subproject to enable all search filters and to be able to search for records. The additional search filters below subproject can be used to refine the search results. The following search filters are available:

- Project
- Zone
- Subproject
- Area
- Community Group
- Staff responsible
- Child Type: child and aging; vocation is not available as these records are not in Portal
- Child status
- Current grade
- List of CH IDs: to create a list specific CH IDs whose records you would like to update, type several CH IDs separated by a comma, for example: 123456,123457,123458 then click Search. If the CH ID(s) belong to a subproject to which you have access and the record status is "Processed", they will be added to the list to print. It is not necessary to include a space after the commas, and there should be no comma or space after the last CH ID entered. It is also possible to copy and pasted a list of CH IDs from Excel as long as there is a comma after each CH ID. For more information about how to copy and paste a list of CH IDs from Excel, please see this video: https://drive.google.com/file/d/1wZqCtN1r2evzgUdrqpthLL1CI4PvzX3E/view?usp=sharing

- Search button: once you have selected the desired search criteria, click the Search button. The records that match the search criteria will be added to the Results for Batch Update grid
- Reset button: to reset the search filters to their default values and clear the Results for Batch Update grid, click the Reset button

10.2.2 Results for Batch Update grid



Results for Batch Update

CH ID	Child ...	Full name	Project	Zone	Subproj...	Area	Comm...	Staff Responsib...
880318	Child	Dulce Maria Gonzalez Alzate	Antioquia		FCC			
880319	Child	Dylan Hincapie Lopez	Antioquia		FCC			
880320	Child	Emanuel Gonzalez Alzate	Antioquia		FCC			
880321	Child	Jeronimo Guarin Araque	Antioquia		FCC			
880322	Child	Mariangel Londoño Piedahita	Antioquia		FCC			
880323	Child	Matias Deossa Jaramillo	Antioquia		FCC			
880324	Child	Matias Hernandez Puerta	Antioquia		FCC			
880325	Child	Miguel Angel Guerra Vergara	Antioquia		FCC			
880326	Child	Sahian Serna Lopez	Antioquia		FCC			
880327	Child	Salome Quintero Marin	Antioquia		FCC			
880328	Child	Sara Restrepo Hernandez	Antioquia		FCC			
880329	Child	Sebastian Zuluaga Mejia	Antioquia		FCC			

20 items

Update | Remove Selected | Remove All

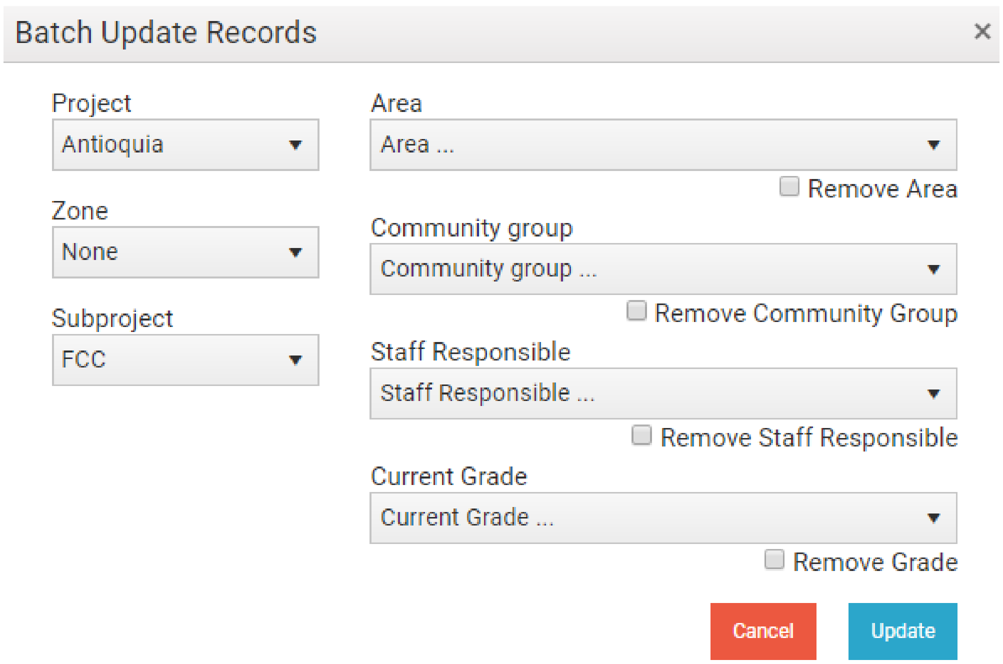
All records that meet the selected search criteria and are able to be updated through the batch update screen will be added to the Results for Batch Update grid. It is important to review the records in this grid, as **all records in the grid will be updated unless they are removed**. The following columns display in the grid:

- CH ID
- Child type
- Full name
- Project
- Zone
- Subproject
- Area
- Community Group
- Staff Responsible
- Child status
- Attending school?
- Current grade
- Record status

Remove selected button: to remove one record from the results grid, select that row and click the "Remove selected" button. To remove multiple records, select one row, press the Control key on your keyboard, select additional rows, then select the "Remove selected" button. To remove a series of records, select one row, press the Shift key on your keyboard, then select another row. This will select the first row you selected, the last row you selected, and every row in between. Click the "Remove selected" button to remove all selected rows.

Remove all button: To remove all labels from the list to print, click the "Remove all" button

10.2.3 Update screen



Once you have reviewed the records in the Results for batch update grid and have ensured that only the records you want to update appear in the grid, click the Update button. A window will appear for you to select new values for one or more of the following fields:

- Project: your project is defaulted for you
- Zone: If a user has access to more than one zone, a different zone can be selected for the records in the batch update grid
- Subproject: If a user has access to more than one subproject, a different subproject can be selected for the records in the batch update grid. If you have more than 50 subproject changes, please do NOT complete these updates via Portal but send a list to your Project Specialist so that these may be completed in Kansas. Updating a subproject is an intensive process for the database, and it is much more efficient for these changes to be done in the database in Kansas.
- Area: a new or different area can be selected for the records in the batch update grid
    - Remove Area checkbox: if the records currently have an area assigned, and you would like to remove the area so that the area field is blank, check this checkbox

- Community group: a new or different community group can be selected for the records in the batch update grid
    - Remove Community group checkbox: if the records currently have a community group assigned, and you would like to remove the community group so that the community group field is blank, check this checkbox
- Current grade: a new or different grade level can be selected for the records in the batch update grid
    - Remove grade checkbox: if the records currently have a current grade listed, and you would like to remove the current grade so that the grade field is blank, check this checkbox
- Cancel button: to close the Update window without applying any updates, select the Cancel button
- Update button: after reviewing the new values of the selected fields to ensure they are correct, click the Update button to apply the updates.

10.2.4 Results for Batch Update grid after applying updates

Once the selected updates have been applied, the updated records with their new values will appear in the Results for Batch Update grid. If only one or more of the following fields were changed, the records will automatically have a status of Processed and do not need to be reviewed by the project or Kansas: Area, Community Group, Staff Responsible, Current Grade. If the subproject field was updated, this requires Kansas approval, and the records will have a status of “Pending Kansas Approval” until the changes are processed in Kansas.

Unable to Update in Batch

CH ID	Child ...	Unable to Update Reason	Full name	Project	Zone	Subproj...	Area
897146	Child	Record status prevents update.	Maria Jose Londoño	Antioquia		FCC	Cañada Negra
897147	Child	Record status prevents update.	Emiliano Castaño Gaitan	Antioquia		FCC	Zamora

2 items

10.2.5 Unable to Update in Batch grid

If one or more records cannot be updated in the batch, they will appear in this grid along with the “Unable to Update Reason”, which explains why the record was not updated. These are possible reasons that a record cannot be updated using the batch update screen:

- It is not possible to update the current grade of an elder or of a child whose record says he/she is not attending school
- It is not possible to update a record that does not have the status of Processed, meaning it has had changes made via the family records screen and/or is waiting for project or Kansas approval
- It is not possible to update a record that is currently claimed by someone else

- If a representative is assigned to multiple children, it is not possible to update the subproject of only one of these children. All children assigned to the representative must be transferred to the new subproject, or none of them can be

10.2.6 Clearing the Results for Batch Update grid for additional searches

After applying updates, it is important to click “Remove all” to remove the records from the grid so that additional updates are not applied unintentionally. Or, you can click Reset to return the search filters to their default values and to remove all records from the grid at the same time.

10.3 Records Search Page

The Records search page provides a way to search for records that meet certain criteria.

10.3.1 Search filters

The following search filters are available:

- Project: projects to which the user has access
- Zone: zones to which the user has access
- Sub: subprojects to which the user has access
- Area: areas that the Project Admin has created. A subproject must be selected before an area can be selected
- Community group: community groups that the Project Admin has created. A subproject must be selected before a community group can be selected
- CH ID: the identification number of the child assigned when the record reaches Kansas
- Record ID: the identification number of the child assigned when the record is saved for the first time
- CH First Name: the first name of the child
- CH Middle Name: the middle name of the child
- CH Last Name: the last name of the child
- Record type: child, youth or elder
- Record status: a drop-down menu with the following statuses. For more information on these statuses, please see the Records workflow section above.
  - In progress
  - Pending Project Approval
  - Problem Record
  - Ready to Submit
  - Pending Kansas Approval
  - Processed
  - Needs Review
  - Declined
  - Retired
- Gender: male or female
- Religion: a text field
- Consent: Yes or No
- Health Status: Good, Fair, or Poor
- Has Limitations: Yes or No
- Attends school: Yes or No
- Current grade: all grades in the educational system of your country
- Is the mother present?: Yes or No
- Mother's Name: a text field that will search for any value entered in the mother's full name. For example, if Ana is entered, values with Ana Maria will be returned.
- Father's Name: a text field that will search for any value entered in the father's full name. For example, if Will is entered, values with William will be returned.

- Under Supervision Of: Mother, Father, and or Guardian
- Age: From and/or To values can be entered to find records within a certain age range
- Last home visit: From and/or To values can be entered to find the records of sponsored members who had home visits within a certain date range.
- Monthly Income: From and/or To values can be entered to find records of families with income in a certain range.

10.3.2 Generating an Excel spreadsheet of search results

To generate an Excel spreadsheet of the search results, check the Excel checkbox.

10.3.3 Search button:

To perform the search using the selected search filters, click the Search button. After performing a search, the search filters will automatically be hidden to give more room to view the search results. To view the search filters again, click the double arrow above the search results.

10.3.4 Reset:

To return the search filters to their default values, click the Reset button.

10.3.5 Search result fields

The following fields are shown in the search results:

- CH ID
- Record ID
- Project
- Zone
- Subproject
- Area
- Community Group
- CH First Name
- CH Middle Name
- CH Last Name
- Child status
- Record Type
- Record Status
- Gender
- Religion
- Consent
- Health status
- Has Limitations?
- Attends School?
- Current grade in school

- Mother’s Name
- Is the mother present?
- Father’s name
- Is the father present?
- Under supervision of
- Age
- Last home visit
- Approximate monthly household income

10.3.6 Search result columns sorting, filtering, freezing and hiding

The search results can be sorted by any column in ascending order by clicking once on the column header. Click the column header again to sort in descending order. The search results can be filtered by any column by clicking on the arrow at the top of the column and selecting a specific filter. To freeze a column and move it to the beginning of the search results, click on the arrow at the top of a column and select Freeze. To hide selected columns, click on the arrow at the top of a column, select Columns, and uncheck the columns you wish to hide. The number of search results displays in the bottom right-hand corner of the search results.

10.4 Printing or Saving Blank Records

To print a blank record to use as a template for collecting information, click on the Blank child record, Blank youth record or Blank elder record link on the Records home page to open a PDF of a blank record template.

10.5 Community Groups Page

The Community Groups page can be used to keep track of information and members of a mother’s group, parent’s group, self-help group, etc. Your Project Admin will create the community groups for your project.

10.5.1 Selecting a community group

To select a community group, select a project, zone and sub to enable the community group menu, then select a group and click the View button.

10.5.2 Adding members to a community group

To add members to a community group, enter the Representative ID of a program representative that you created on the Representatives page (see Representatives Page section). The Representative must be tied to a CH ID that belongs to the same subproject as the selected community group.

10.5.3 Adding details to each member

After adding a member to a group, you can optionally type the role of the user in the group (each project may determine these roles), select if the member is a signatory on the bank account of the group, and add any comments you would like to track for each member.

10.5.4 Removing a member from a group

To remove a group member, click on the X on the row for that member. Once a member is removed, it cannot be undone. You can re-add the member, but you would have to re-type any comments and the role and signatory information.

10.5.5 Adding notes to a group

The Notes field can be used to keep track of information that applies to the group as a whole. An example would be the day, time and location of the group meetings.

10.5.6 Remove all members button

If for any reason you would like to inactivate a community group, all members must first be removed from it. To remove all members for a group, click this button. However, only use this when truly necessary because if it is clicked by mistake, all members would have to be manually re-added.

10.5.7 Save button

When all desired additions or changes to the group have been completed, click the Save button to save your changes.

10.5.8 Cancel button

To discard any unsaved changes, click the Cancel button.

10.6 Representatives Page

A representative for each child can be created to keep track of the information for this person. This is the person that represents the child in the program, attends community group meetings, or who is the general Unbound contact for the family. Phone numbers for eLetter delivery via mobile phone are also saved on the Representatives page.

10.6.1 Assign existing representative

If a representative has already been created and only needs to be assigned to an additional CH ID, enter the CH ID of the sponsored member who already has the representative assigned, type the Representative ID of the existing representative and click "Assign representative". Click Save to save the changes. If you do not have the Representative ID of the existing representative, you can find it using the Representative Search page (see the Representative Search section below).

You will now see all of the CH IDs the representative represents at the bottom of the page.


Child, Youth or Aging represented in the program

CH ID	Name	Relationship	Other relationship	
719924	Emma Mairena	Other	Amiga	×
674448	Lisby Karina Ponce Salgado	Mother		×
895213	Micaela Monserath Ponce Salgado	Mother		×

Click Save to save changes.

10.6.2 Creating a new representative

To create a new representative, enter the CH ID of the child the person will represent in the top left-hand corner of the Representatives page, then click the Search icon or type Enter. The only information that is required is the first name of the representative and the relationship to the child, youth or aging represented in the program. Optionally, you can add the middle and last name and a contact method. Note: a new representative should only be created if the representative does not yet have a Representative ID created for any other CH ID. If the representative is already assigned a Representative ID for another CH ID, please follow the steps in the "Assign existing representative" section to avoid creating multiple Representative IDs for the same person.

Adding contact methods

It is optional to add a contact method(s) for a representative. The contact method does not necessarily need to belong to the representative if, for example, the only phone number available belongs to another family member besides the representative. To add a contact method, select a contact type from the drop-down menu, either cell phone (mobile phone), email address or other. Type the detail, such as the phone number, and add an optional comment if you would like. The phone number must begin with + and the country code of your country, for example +123. If try you save a phone number that is not in this format, Portal will remind you what the country code is.

If adding a cell phone/mobile phone number and you would like to use this phone number for eLetter delivery and photo notifications, check the “Send communication” checkbox. eLetters and photo notifications will only be delivered to the mobile phone if this checkbox is selected. It is not required to deliver eLetters or photo notifications via mobile phone and this decision should be made by the project and sponsored family. If the family is concerned about data costs or if you are uncertain if the phone number is up-to-date, this may be a reason why you choose not to deliver eLetters or photo notifications to the mobile phone of certain families.

If “Send communications” is selected and a communication is sent to the mobile phone that has not been delivered successfully after 3 days, Portal will also automatically uncheck the “Send communications” checkbox so the phone number will not be used for future communications unless it is updated and “Send communications” is selected again.

If a family receives an eLetter or photo notification and replies, “Stop”, “Unsubscribe” or something similar, “Send communications” will be unchecked automatically because we cannot legally send messages to the mobile phone if the family has unsubscribed.

If the mobile phone is a smart phone, click the “Smart phone” checkbox. If delivering eLetters to a smart phone, the system will first try to deliver a link to the eLetter via WhatsApp, which will include any photos. If the smart phone number does not have a WhatsApp account associated with it, the link to the eLetter will be delivered via text message, which will include any photos.

If the mobile phone is not a smart phone, do not select the “Smart phone” checkbox. If the phone is not a smart phone but “Send communication” is selected, a link to the eLetter will be delivered via text message. However, non-smart phones are not able to open links, so if the family is unable to open the link on another device, it will be necessary to print and deliver the physical eLetter.

Click the plus sign to add the contact method.

Multiple contact methods can be added, but one must be selected as primary. If only one contact method exists, it will automatically be selected as the primary when saving the representative. The primary contact method will display on the Community Group Detail report.

Relationship to child, youth or aging represented in the program

Select the relationship of the representative to the child, youth or aging represented in the program. Options are mother, father and other. If other is selected, the specific relationship must be entered in the Other relationship field, such as grandmother, brother, aunt, etc.

Save button and Representative ID

To save the changes to the representative, click the Save button. After the representative is saved, the Representative ID is created. This will be used to add the representative to a community group.

Cancel button

To discard any unsaved changes to the representative, click the Cancel button.

10.6.3 Representative Search

To find the Representative IDs of existing representatives, click on the Representative Search button in the upper-right hand corner of the Representatives page.

The following filters are available to search for representatives:

- Project
- Zone
- Subproject
- Representative Name
- Representative Last Name
- Child Status: defaults to Sponsored and Change of Sponsor, but Available or Retired can also be selected
- Representative ID
- CH ID

It is not necessary to select all filters. For example, it is possible to enter a project and a CH ID only.

Search button

To perform a search using the selected filters, click the Search button

Reset button

To return the search filters to their default values, click the Reset button.

Representative search result fields

The following search result fields are displayed:

- Representative ID
- Representative Name
- Project
- Zone
- Subproject
- CH ID
- Child Name
- Child Status
- Phone number
- Smart phone
- Send Communication
- Comments
- Area

- Community Group
- Staff Responsible
- Excel export: this button can be used to download the representative search results

10.7 Manage Custom Fields

In addition to the standard fields on the family record, each project may wish to keep track of additional fields according to their needs. It is completely optional to use these fields. The Project Admin has access to this page and can specify the names of up to eight fields for the child and youth record and up to eight fields for the elder record. Additionally, up to four comment fields each can be named for the child and youth record and the elder records. Once these fields are named, the custom field names will display in the “Custom fields” section of the record. For example, if Custom field 1 of the child record is named “T-shirt size”, the first field in the custom fields section of the child record will display as “T-shirt size”.

Up to three custom fields can be named for sponsor mail to keep track of additional information regarding the mail received from sponsors. Up to two comment fields can be named for sponsor mail. These custom fields appear on the Mail page when adding or editing a sponsor mail entry, as well as on the two Mail reports.

10.8 Manage Areas

On the Manage Areas page, the Project Admin can create areas for each subproject. An area is an entity smaller than a subproject. It is optional to use areas in Portal, but if your project has a need to divide beneficiaries into groups smaller than subprojects, the area field can be used. Once areas are created, they will appear in the Areas drop-down menu on each family record. Once sponsored members are assigned to areas using this field on the record, current month reports can be generated and will display the area of each sponsored member. Current month reports can also be filtered to and generated by a specific area.

To create or edit an area, select a project, zone and subproject and click Search. Type the area name (up to 50 characters) and click the + button to add the Area. Area names must be unique within each subproject.

To edit an area, click the pencil button by an area name under Existing areas. Modify the area name and click the checkmark button to save the changes.

To inactivate an area, click the X button next to an existing area. Be careful only to inactivate an area when you are absolutely sure you want to inactivate it, because it is not possible to re-activate the area after it is inactivated.

10.9 Manage Community Groups

On the Manage Community Groups page, the Project Admin can create community groups for each subproject. A community group is also referred to as a mother’s group, a parent’s group, a self-help, etc., depending on your project. It is optional to use community groups in Portal, but if your project has a need to track these groups and which parents and sponsored members belong to them, they can be used. Once community groups are created, they will appear in the Community groups drop-down menu on each family record. Representatives can also be added to community groups on the Community Groups page. Once sponsored members are assigned to community groups using this field on the record, current month reports can be generated and will display the community group of each sponsored member. Current month reports can also be filtered to and generated by a specific community group.

To create or edit a community group, select a project, zone and subproject and click Search. Type the community group name (up to 50 characters) and click the + button to add the Community group. Community group names must be unique within each subproject.

To edit a community group, click the pencil button by a community group name under Existing community groups. Modify the community group name and click the checkbox button to save the changes.

To inactivate a community group, click the X button next to an existing community group. Be careful only to inactivate a community group when you are absolutely sure you want to inactivate it, because it is not possible to re-activate the community group after it is inactivated.

10.10 Records Allotment

Top-level project users have the ability to see records allotment information for their entire project. This information is not separated by zone or subproject. Records allotment information is shown for the current semester, either January – June or July – December. Retirements are updated on an hourly basis.

The default view of the records allotment screen shows the total number of replacement records OK to send:

RECORDS ALLOTMENTS	JANUARY - JUNE
January - June growth records approved	120
Replacements OK to send +	283
Records adjustment	0
Total records OK to send	403
Records submitted	186
Total records available to send	217
Fulfillment Percentage (%)	**46.15**

As of 30 March, 2017 17:00 PM CST.

If the plus sign by Replacements OK to send is clicked, a detail view of the replacement records calculation is shown:

RECORDS ALLOTMENTS		JANUARY - JUNE
January - June growth records approved		120
Replacements OK to send –		283
	Total retirements	283
	Non-compliance retirements	0
	Exit surveys pending	0
Records adjustment		0
Total records OK to send		403
Records submitted		186
Total records available to send		217
Fulfillment Percentage (%)		**46.15**

As of 30 March, 2017 17:00 PM CST.

The following categories are shown:

- Growth records approved for the current semester (January – June or July – December): if a project is has growth records allocated, the number of growth records for the semester is shown here.
- Replacements OK to send: the total number of replacement records that can be sent for the semester, which is calculated by taking the number of total retirements minus the number of non-compliance retirements minus the number of exit surveys pending (see details below). If replacements are not allowed for a project, this number will be zero.
    - Total retirements: the total number of retirements from the project for any reason during the current semester. This is a hyperlink that, when clicked, will show a list of all retirements processed during the current semester.
    - Non-compliance retirements: the number of retirements from the project for no letter, no photo or no response to an Update Request for the semester.

- Exit surveys pending: this is a category that will be used in the future once we have exit surveys available in Portal. In order to be allotted a replacement record, a short survey will need to be completed in Portal to provide information about the former sponsored member leaving the program. Currently, it is not necessary to complete an exit survey to be allotted a replacement record.

- Records adjustment: this category will be used to modify the number of records a project can send, by either a positive or negative number, for any reason.
- Total records OK to send: the number of growth records plus replacements OK to send plus or minus the records adjustment
- Records submitted: the total number of new or replacement records that have been submitted to Kansas during the current semester. This number will update as soon as a record is submitted for Kansas approval. This is a hyperlink that, when clicked, will open an Excel spreadsheet with the specific records submitted during the current semester.
- Total records available to send: the total number of records remaining to be sent for the semester (or, if this is a negative number, the surplus of records that has been received to date). This number is calculated by taking the total records OK to send minus records submitted.
- Fulfillment percentage: the percentage of records already sent for the semester. This percentage is found by taking the number of records submitted divided by the total number of records OK to send.

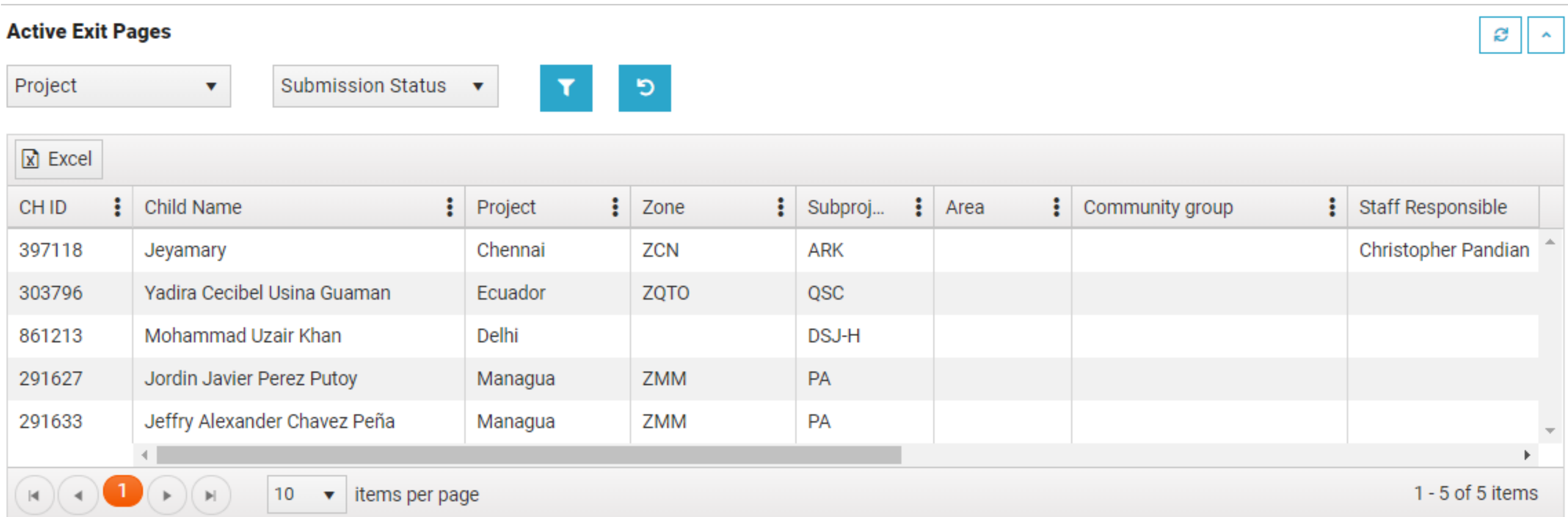
11 Exit Page

The Exit Page is used to request retirements for people leaving the Unbound program and to enter details about why they are leaving the program.

11.1 Exit Page Access

Users with the roles of Coordinator, Project Admin, Correspondence Staff, Social Worker and Internal Translator can create and edit exit pages. The roles of Coordinator, Project Admin and Correspondence Staff at the project level can submit exit pages to Kansas.

11.2 Active Exit Pages



CH ID	Child Name	Project	Zone	Subproj...	Area	Community group	Staff Responsible
397118	Jeyamary	Chennai	ZCN	ARK			Christopher Pandian
303796	Yadira Cecibel Usina Guaman	Ecuador	ZQTO	QSC			
861213	Mohammad Uzair Khan	Delhi		DSJ-H			
291627	Jordin Javier Perez Putoy	Managua	ZMM	PA			
291633	Jeffry Alexander Chavez Peña	Managua	ZMM	PA			

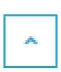
The top section of the Exit Page shows exit pages that have been started for sponsored members, but the retirements have not yet been completed. You will only be able to see exit pages from projects to which you have access.

- CH ID: Enter a specific CH ID in this search field to create, view or modify the exit page for a specific CH ID. You can only view exit pages for sponsored members from the projects, zones or subprojects to which you have access.
- Project filter: if you have access to multiple projects, this filter can be used to filter the results in the search grid by one project.
- Submission Status: this filter can be used to filter to one of the following submission statuses:
    - In Progress: exit pages that have been started but not yet submitted to the project for approval
    - Pending Project Approval: exit pages that have been submitted to the project and are awaiting approval before being sent to Kansas
    - Future: exit pages that have been completed for older youths in benefits through status who will graduate in the next two years. These exit pages should be reviewed and edited if necessary to ensure they are accurate before the retirement date is reached.
    - Pending Kansas Approval: exit pages that have been completed, approved by the project and sent to Kansas for approval and to complete the retirement
    - Declined by Kansas: exit pages that have been declined by Kansas and need action by either the project, zone or subproject to resolve an issue
    - Declined by project: exit pages that were submitted to the project for approval but were not approved or sent to Kansas. These need action by the zone or subproject to resolve an issue.

-  Filter icon: click this button to apply the filters selected in the Project and Submission Status drop-down menus to the exit pages that display in the exit page grid, if needed.

-  Reset icon: click this button to clear the filters and show all exit pages to which you have access in the exit page grid

-  Refresh icon: if you are viewing a specific exit page, click this icon to clear the exit page or to search for it again to see updated information.

-  Collapse/Expand icon: click this icon to hide or view the search results grid.

11.2.1 Exit Page Grid

The grid at the top of the Exit Page shows exit pages that have been started, but the retirements have not yet been completed. To view the exit page of a specific sponsored member, click on that row in the grid to display the exit page information below.

The following columns appear in the exit page grid:

- CH ID
- Child Name
- Project
- Zone
- Subproject
- Area
- Community Group
- Staff Responsible
- Child Status
- Submission Status
- Submitted to Kansas on: the date on which the exit page was most recently submitted to Kansas:
- Submitted to Kansas by: the username of the person who most recently submitted the exit page to Kansas
- Retirement reason
- Retire on: the date on which the person should be retired. For people who currently have a sponsor, this is the date on which the exit page is created, although this date does not appear on the exit page itself for sponsored members. For people in change of sponsor status, this could be a future date if the person is in benefits through status. Sort this column in ascending order to make sure there are no exit pages created in the past that need to be submitted or that are no longer applicable and need to be deleted. Sort the column in descending order to review future retirements such as Benefits Through cases to ensure that the retirement reason is "No longer studying" with the correct sub-reasons, last grade passed and other details selected. These details can be updated as the retirement date approaches if necessary.
- Last Modified On
- Last Modified By

- Sort order: the exit pages in the grid are sorted by default by submission status in the following order: Declined by Kansas, Declined by Project, In Progress, Pending Project Approval, Pending Kansas Approval, Future

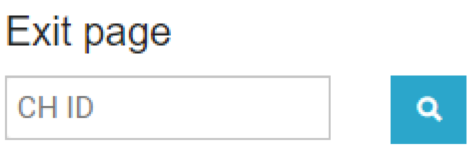
- Filtering and sorting search result columns: the search results can be sorted by any column in ascending order by clicking once on the column header. Click the column header again to sort in descending order. The search results can be filtered by any column by clicking on the arrow at the top of the column and selecting a specific filter.

- Pages in search results: You can navigate to the first, previous, next or last page in the results by using the arrow buttons at the bottom left of the grid.

- Number of items per page: by default, 10 exit pages display per page in the grid. You can change the number of exit pages that display by selecting another number from the “items per page” drop-down menu.
- Number of items: the number of exit pages in the grid displays in the bottom right-hand corner.

11.3 Creating an Exit Page

To request the retirement of a beneficiary or available person who is leaving the Unbound program, enter his/her CH ID in the CH ID field at the top of the Exit Page and type Enter or click on the Search icon to create the exit page:



- Child information: After searching for the CH ID, you will see the following information for the sponsored member in this section: Child Name, Age, Child Status, Record Status, Project, Area, Community Group, Staff Responsible
- Sponsor Info: If the beneficiary is currently sponsored, you will see the following information about the current sponsor in this section: Sponsor ASC ID, Sponsor Name, Gender, Sponsorship begin date
- Exit page information: after the exit page is created and saved, you will see the following information in the next section: CH ID, Submission Status, Last modified by, Last modified date

11.3.1 Exit Page Survey

There is a short survey for each sponsored member that leaves the Unbound program. The information collected from this survey will help inform the sponsor about the retirement provide data about the program.

- Update Request: If a beneficiary has a pending Update Request and an exit page is created, the Update Request reference number will display automatically in this field. If the beneficiary does not have a pending Update Request, this drop-down menu will be blank and it is not necessary or possible to select anything. To request to retire the beneficiary now or to request that an older student in “Change of sponsor” status be put in “Benefits through” status because their graduation date is in the next two years, simply complete the exit page and submit it to Kansas to respond to the Update Request. It is not necessary to respond to the Update Request separately in these cases.

- Primary reason for exiting the program:
    - No longer studying
        - Completed educational goal
            - Working in desired field
            - Working in job other than desired field/occupation
            - Not working
        - Did not complete educational goal
            - Started work and/or military service
            - Started a family
            - Demotivated to study
            - Family decision based on economic constraints
            - Academic challenges
    - Moved out of area
    - Sponsored member died
    - Econ situation improved
    - Duplicated in database
    - Subproject closed
    - No longer meets program requirements
    - Voluntarily left the program
    - Other
- Please provide any additional details about why the sponsored friend is not continuing in the program and what he/she is doing next. If the sponsored member died, please provide information about the cause of death: this field is required if the primary reason for exiting the program is Sponsored member died, Unwilling to meet program requirements or Other to be able to give the sponsor additional information about these circumstances. If another reason is selected, this field is optional but can be completed to provide any additional information that would be helpful to the sponsor, especially if it is not included in the farewell letter.
- Enter the last grade of school passed by the child/youth: this drop-down menu will display the grade levels according to the education system in your country. Select the last grade successfully passed by the child or youth. This question does not appear for elders. If the child/youth never attended school, select the "N/A" checkbox, which will display the question, "If the child/youth never attended school, why?" drop-down menu. Select a reason from this menu to explain why the child never attended school, either Too young, Physical/mental limitations, or Other. Enter any additional information about why the child/youth never attended school in the text box provided. If Other is selected, this text box is required.
- Has the child/youth completed additional vocational/technical training? Select yes or no. If yes is selected, describe the vocational/training in the textbox provided. This description can be brief and will help gather information about various training programs in which sponsored members participate. It is not necessary to list many specific details about the program of each member, though.

- Has the youth consented to provide his/her contact information for future project/Kansas use? If so, please provide his/her email address: this field only displays for youths 18 and older and may be used in the future to contact alumni of Unbound for surveys or activities. Email addresses should only be entered if the youths consent to share them. The email addresses can be updated even after the youths are retired.

At this point, you can either click Create to continue and save the exit page or click Cancel to discard changes:

After creating the exit page, additional fields related to the farewell letter will display:

- Farewell letter required/not required: based on the sponsorship status, Portal will indicate if the farewell letter is required or not. If the person was not sponsored at the time the exit page was created, or if the person was sponsored for 60 days or less, no farewell letter is required. If the reason for exiting the program is that the sponsored member died, a message will indicate that the farewell letter is required but can be upload later when it is available. In this case, the exit page can be submitted to Kansas without a farewell letter, and it can be uploaded later, even after the retirement.
- Who wrote the farewell letter? Select one of the following options from the drop-down menu according to who wrote the farewell letter: Sponsored member, family member, staff member, other. If an option other than sponsored member is selected, an additional field will display, “Please explain why the sponsored member did not write the Farewell Letter.” This field is required unless the sponsored member died, in which case it is not necessary to explain why he/she did not write the letter.
- Farewell letter: if the farewell letter is required, it should be created as a digital letter on the digital letters page. Once the farewell letter is approved in Portal, it will appear on the exit page for the sponsored member. If the digital letter batch is sent to the Translation Module, the TM batch must also be translated, checked in and reviewed before the letter will appear on the Exit Page
- English translation: if the original farewell letter is not written in English and the letter was translated in the Translation Module, the translation will appear once the TM batch is translated, checked in and reviewed. If the letter is not sent to the Translation Module, the English translation should be included as an additional page(s) of the digital letter that is uploaded to Portal. If the letter is a typed letter, the translation should be typed after the content of the original letter. different one if necessary.

- Comments: the comments section can be used to communicate between the project and subproject or between the project/subproject and Kansas. If an exit page is declined by the project, a comment to indicate why can be entered. Similarly, Kansas will enter a comment if they decline an exit page once it reaches Kansas. Comments can also be entered for any other reason needed and will not be visible to the sponsor.

11.4 Exit Page Workflow for immediate retirements

If an exit page is completed and submitted to Kansas, Kansas will process the retirement as soon as possible. The only exception is for future retirements for beneficiaries in change of sponsor (please see the section below for more information).

Once the survey is complete and the farewell letter and/or translation are saved, the exit page can be submitted to the project for review. To do this, click the Submit to project button. This will save the exit page in "Pending Project Approval" status:

Submit to project

Once the exit page is in "Pending Project Approval" status, the project can review the exit page and attachment(s). The central project office can make necessary changes if possible. If everything looks good, click Submit to Kansas to request the retirement from Kansas, which saves the exit page in "Pending Kansas Approval" status:

Submit to Kansas

If changes are needed to the exit page or attachments(s) that the central project office is unable to make, they can send the exit page back to the zone or subproject office by clicking "Decline". This saves the exit page in "Declined by project" status and indicates to the subproject or zone that changes are needed. It is required to enter a comment to indicate what changes should be made.

Decline

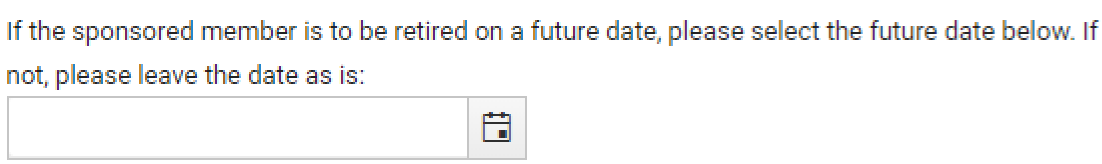
Once the appropriate changes are made to an exit page in "Declined by project" status, the zone/sub can click "Submit to project" again to save the exit page in "Pending Project Approval" status again. Comments can be entered to indicate the changes that were made if this is helpful. The central project office will then decide again to submit the exit page for Kansas approval or to mark the exit page "Declined by project."

Once the exit page is in "Pending Kansas Approval Status", Kansas will either process the retirement, in which case the sponsored member will be retired from the program. The sponsorship status and exit page status will change to "Retired." The exit page will no longer be viewable in the exit page grid, but it can be viewed by searching for the specific CH ID. If there is an issue with the exit page, Kansas will decline it, and it will have the status of "Declined by Kansas." A comment will indicate the specific issue. The workflow above should be followed once the requested changes are made to submit the exit page to the project and then to Kansas again.

11.5 Exit page workflow for future retirements for older students in change of sponsor status

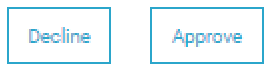
In some cases, an older student may lose his/her sponsor and enter change of sponsor status. It is likely that an Update Request will be sent for these cases to ask if the student should be retired now, if the student will graduate within the next two years and continue to receive benefits but not a new sponsor, or if the student will graduate more than two years from now and will need an updated record and a new sponsor. If the student will be in benefits through status, it is possible to select a future retirement date on the exit page to indicate the graduation date.

For beneficiaries in change of sponsor status, you will see the following field:



The date in this field will automatically default to the current date. If the beneficiary should be retired as soon as possible, leave the date as is. If the beneficiary is an older student who will graduate in the next two years, change the date to the future graduation date and save the exit page. The remaining exit survey questions can be completed to the best of your knowledge according to the future plans of the student. However, please be aware of the retirement date and make any necessary updates to the exit page before the graduation date is reached. Kansas will retire the student on the graduation date unless the exit page is updated before that. Once the exit page is complete, submit the exit page to the project.

For future retirements, the central project office has the option to select Approve or Decline. "Declined by project" will indicate to the zone or subproject that the exit page needs to be edited in some way. Approve will save the exit page in Future status, which means that Kansas will receive the exit page and retire the student on the graduation date indicated. However, the exit page can and should be modified as necessary if any details of the retirement date, reason for exiting the program, last grade passed, etc., change before the graduation date occurs.



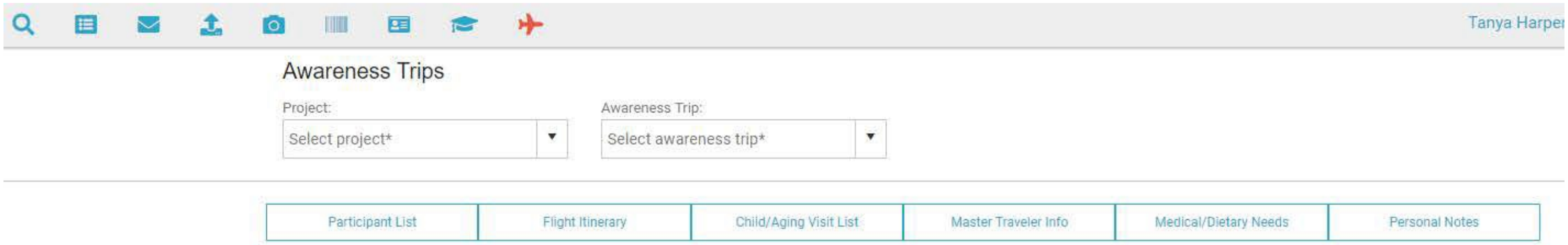
11.6 Exit page workflow for a sponsored member that passes away

If a sponsored member passes away, the exit page should be completed as soon as possible and sent to Kansas so that we can notify the sponsor and stop sending benefits for the sponsored member. The exit page should be completed and sent to Kansas even if the farewell letter is not available right away. When the farewell letter is available, it should be uploaded/created as a digital/typed letter even if the sponsored member has already been retired. The letter will be attached to the exit page and be sent to Kansas once the letter has been approved in Portal and translated and reviewed (if necessary) in the Translation Module.

11.7 Deleting an Exit Page

It is possible to delete an exit page at any point up until the point it is submitted to Kansas. If an exit page is created for the wrong person in error, or if it is discovered that the sponsored member will no longer retire from the program, it may be appropriate to delete the exit page.

12 Trips Page

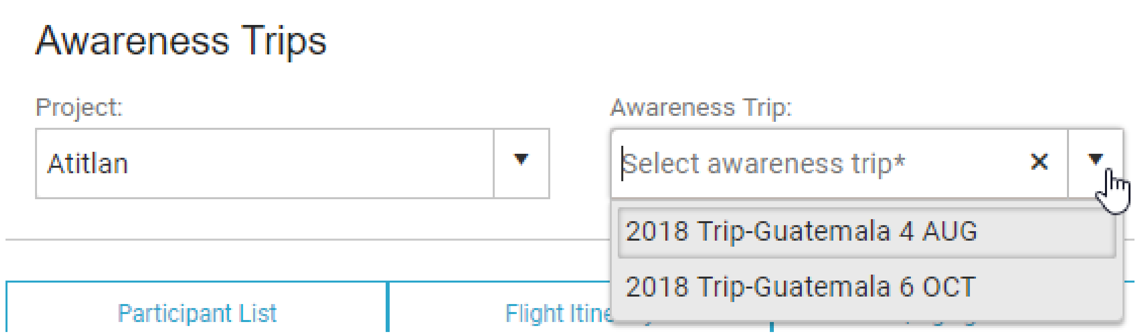


12.1 Trips Page Access

The Trips page is available to Portal users with the role of Coordinator, Project Admin and Trips Staff. Trips Staff is a role that can be assigned by the Project Admin to any Portal user that needs access to trips reports. This role can be assigned in addition to an existing role of a user. This role will simply let the user view the trip reports via the Trips page, in addition to all of their current access.

12.2 Awareness Trip Drop-down Menu

On the Trips page, your project will be pre-selected for you in the Project drop-down menu. Click on the Awareness Trip menu to view upcoming awareness trips. If there are reports available to view, you will see one or more awareness trips in this drop-down menu. If there are no trips in the drop-down menu, then the Kansas trips coordinator has not yet made them available. Reports are typically made available about three months prior to a trip. Contact a trip coordinator at trips@unbound.org if the reports are not appearing or if you need the information sooner.



12.3 Trip Reports

If there is a trip to select from the Awareness Trip drop-down menu, select it to view the reports related to this trip. The following reports are available:

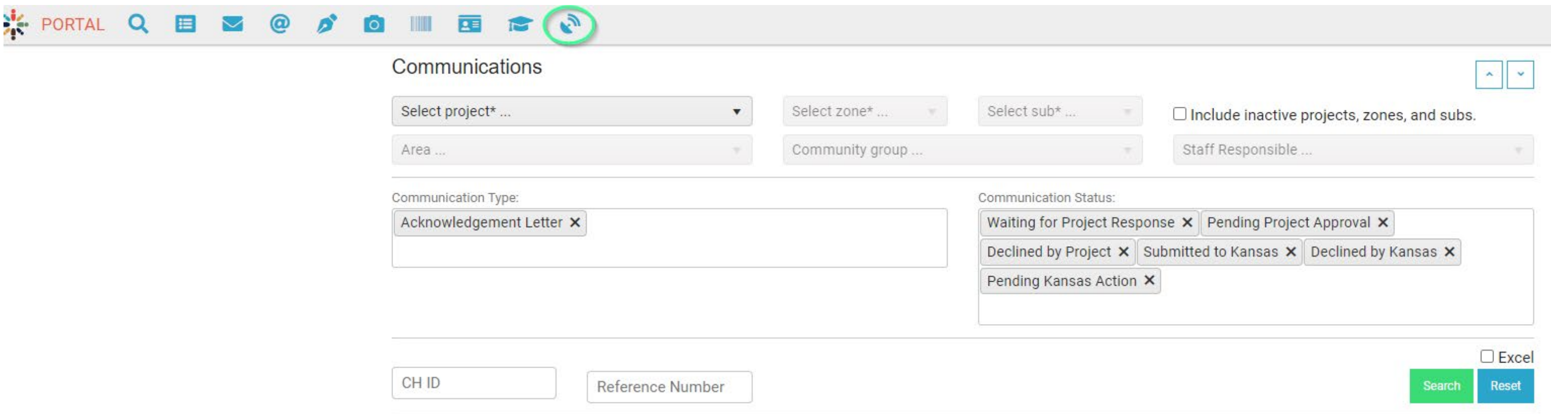
- Participant List
- Flight Itinerary
- Visit List
- Traveler Summary
- Medical and Dietary Needs
- Personal Notes

These are the same reports that the trip coordinators used to send via email. It

is important to visit Portal often to check the Trips page for updated reports.

One week after the end date of the trip, the reports for that trip will be removed from Portal. This is to comply with regulations that we keep the information of sponsors secure.

13 Communications



13.1 Main Communications page

The Communications page is used to view requests for Acknowledgement Letter for special gifts to a sponsored family need fund that is $100 or more. Kansas will send these requests each month between approximately the 2nd and 5th of the month, which is when you will see new requests appear for funds disbursed on the 1st of that month. On rare occasions, a request might be sent later in the month if a sponsor requests an Acknowledgement Letter. If a special gift is recurring, an Acknowledgment Request will only be created once every 6 months. For recurring special gifts ≥ $100, it is only necessary to send a letter acknowledging this gift when you receive an Acknowledgement Letter request. It is not necessary to send letters more frequently than that. If a beneficiary already has an Acknowledgement Letter request pending, Kansas will not send another one for subsequent gifts until the pending Acknowledgement Letter is received.

The following search filters are available on the Communications page:

- Project
- Zone
- Subproject
- Area
- Community Group
- Staff Responsible
- Communication Type
- Communication Status: by default, all statuses except Closed and No response received are selected. These are the communication statuses:
    - Waiting for Project Response: the communication has been sent from Kansas and is waiting for the project to send the Acknowledgement Letter.
    - Pending Project Approval: a response has been entered by a zone or subproject team member on the communication detail screen, and the response needs to be reviewed by a project team member before it can be submitted to Kansas.
    - Declined by Project: a response was entered by a zone or subproject team member, and upon review, a project team member declined the communication, which now needs follow-

up by the zone or subproject. It is also possible that a digital Acknowledgement Letter was created and declined by the project, which also declines the communication.
  - Submitted to Kansas: a digital Acknowledgement letter has been sent to Kansas via the Digital Letters page in response to the communication.
  - Declined by Kansas: Kansas received the response to the communication and declined it, either by declining a digital Acknowledgement Letter or by declining the communication itself.
  - Pending Kansas Action: a response was entered to the communication on the communication detail page and was sent to Kansas. No digital letter was sent.
  - Closed: a response has been received and the communication is no longer pending
  - No response received: a response was never received after some time and it is too late to send one.
- CH ID
- Reference Number
- Excel: to create an Excel file of the search results, select this checkbox before clicking on Search
- Search button: displays the communications that meet the selected search criteria
- Reset: returns the search filters to their default values

The following columns are available on the search results grid:
- CH ID
- Reference #: a link that opens a specific communication in the communications detail screen
- The third column will display an exclamation mark if the communication no longer requires a response or if it has otherwise been updated by Kansas since it was sent. This could mean the communication is now requesting additional information in addition to the original request. In these cases, the communications appear first in the search results.
- Name
- Middle Name
- Last Name
- Project
- Zone
- Sub
- Area
- Community Group
- Staff Responsible
- Communication Type
- Date Requested
- Communication Status:
- Subject
- Child Status
- Last Modified On: the date on which the communication was last modified
- Last Modified By: the name of the user who last modified the communication
- Closed on: the date on which the communication was closed

13.2Communication Detail Page

To view the details of a communication, click on the Reference Number in the search results grid on the main communications page.

CH ID	Reference #	↓	Name	Middle Name	Last Name	Project	Zone	Sub
738762	AL202105250461		Benjamin	Opondo	Mito	Kisumu		RAR
695205	AL202105250334		Jared	Otieno	Pambo	Kisumu		BON
682327	AL202105180514		Cynthia	Adhiambo		Kisumu		KSM

This will open the details of the communication in a new tab:

Communication Detail

AL202105250461

PDF

Child Information

CH ID	Child Name	Project	
738762	Benjamin Opondo Mito	Kisumu - RAR	Submit to project

Date Requested	Communication Type	Communication Status	Last modified by	Last modified
25/05/2021 04:01 PM	Acknowledgement Letter	Waiting for Project Response	LuisaZ	25/05/2021 04:01 PM

Speed Letter: Acknowledgement letter./LZ Kisumu RAR ASC809736 Davidson CH738762

In the June transfer, Brian Davidson sent $200.00USD for the Family Need Fund for Benjamin Opondo Mito.

Here you, can see the details of the Acknowledgement Letter requested. Whenever possible, please do not respond to the communication via the communication detail page. Instead, please create a typed digital letter using the "Acknowledgement" letter type or upload an Acknowledgement Letter on the Digital Letters page. This will make it easier to process and review Acknowledgement Letters. Please only enter a response on the communication detail page if there is a question or if the special gift has already been acknowledged in some way, such as through a different letter that has already been sent. If the gift has already been acknowledged, please include details in the response such as the digital letter batch ID that included the letter.

Attachments: it is possible to attach a file to the communication.

Responses: it is possible to enter a response on the communication for other either project or Kansas team members to see.

13.3Communication workflow

This workflow should only be used if a digital Acknowledgement Letter cannot be sent:

- Submit to project button: if an digital Acknowledgement Letter is not being sent in response to the communication, click this button to send the response to be approved by the project.

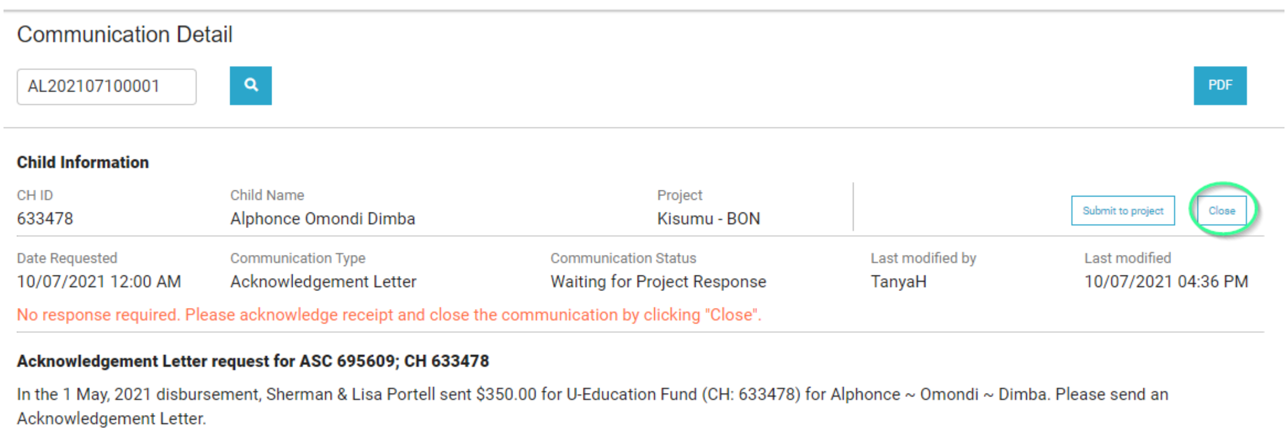
- Submit to Kansas: Once the communication has been submitted to the project, a project team member can click this button to send the response to Kansas.
- Decline: for communications in Pending Project Approval status, this button can be used to decline the communication and indicate that it needs follow-up by the zone or subproject.

13.3.1 No Response Required Communications

At times, Kansas may send a communication for your information only, but no response is needed. Or, a communication may be sent that initially requires a response, but it is later changed to "no response required." In these cases, the communication will appear on the search results grid with an exclamation point:

CH ID	Reference #	↓	Name	Middle Name	Last Name	Project	Zone	Sub
633478	AL202107100001	!	Alphonce	Omondi	Dimba	Kisumu		BON
738762	AL202105250461		Benjamin	Opondo	Mito	Kisumu		RAR
695205	AL202105250334		Jared	Otieno	Pambo	Kisumu		BON

To acknowledge and close the communication, click on the linked Reference number. You will see a message that says, "No response required. Please acknowledge receipt and close the communication by clicking Close." Simply click the Close button to close the communication immediately. No further action is needed.



13.4 Sending digital Acknowledgement Letters

The preferred way to respond to Acknowledgement Letter requests is by sending a digital Acknowledgement Letter through the Digital Letters page.

14 Agents of Change

14.1 Agents of Change main page

The Agents of Change (AC) page is used to manage AC initiatives and view funds allotted. From the main page, there are links to the Initiatives page and Search Initiatives page.

Top-level project users can view Allotments information:

- Amount Approved: the total funds allotted to the project for the specific month. This can be divided among various initiatives in $500-$1500 increments.
- Amount Submitted to Kansas: the total funds from initiatives that have already been submitted to Kansas during the specific month.
- Amount Available: funds that are still available for the specific month to be assigned to initiatives not yet submitted to Kansas.
- Fulfillment percentage: the amount submitted to Kansas divided by the amount approved, in other words, the percentage of funds submitted of total funds available. If all available funds from a given month are not used, they cannot be added to the funds for the next month.
- Previous/Next buttons: navigate to the allotment information from the previous or next year, if applicable.

Agents of Change

Project:
Antioquia

Initiatives
Search Initiatives

2023	Amount Approved	Amount Submitted to Kansas	Amount Available	Fulfillment Percentage
August 2023	$20,000	$1,900	$18,100	10 %
September 2023	$10,000	$4,600	$5,400	46 %
October 2023	$5,000	$0	$5,000	0 %
November 2023	$3,000	$0	$3,000	0 %
December 2023	$0	$0	$0	0 %
2023 Total	**$38,000**	**$6,500**	**$31,500**	**17%**

Previous Next

14.2 Initiatives page

From the Initiatives page, users can enter a specific Initiative ID and click search to view the details. To create a new initiative, click the Create new initiative button.

14.2.1 Workflow

The Agents of Change workflow has the following steps:

- Initiative Created: After clicking Create new initiative, completing the required fields in the Basic Info section and clicking Save, the initiative is saved in this status. These are the required fields:
    - Project
    - Zone
    - Subproject
    - Category: the area in which the improvement that will be made
    - Title: the name of the initiative
    - Requested grant amount in USD
    - Estimated number of families impacted
    - Estimated time needed to complete in days
    - What needs or challenges does the community face tha this initiative will solve?
    - Summary

  These fields are optional and only necessary to complete if applicable:
    - Community Group
    - Funding obtained from other sources
    - Attachments: documents related to the initiative can be saved here, such as the application in the local language or quotes from vendors.
    - Comments: users can comment on the initiative if needed. If an initiative is declined at the project or Kansas level, declined comments will be saved here.

- Pending Project Approval
    - Before submitting an initiative for project approval, at least 1 but up to 3 “before” photos must be uploaded, and captions must be added. One photo of the community group must be uploaded, and a caption must be added. All AC photos must be in horizontal orientation with dimensions of 1200 pixels in width by 800 pixels in height. This is so they can be displayed in standard format to grantors on unbound.org.
    - Once the initiative is saved in this status, a project-level user will have the option to approve or decline it.
- Ready to Submit: after a project-level user approves the initiative, it will be saved in this status to indicate that it is ready to submit to Kansas. It may or may not be submitted right away, depending on the allotted funds available or if the initiative has priority over other initiatives.
- Delete initiative: if an initiative has been saved and not yet submitted to Kansas, a project-level user can delete it.
- Pending Kansas Approval: Kansas will review initiatives in this status and approve or decline them.
- Approved by Kansas: after Kansas approves an initiative, it may continue directly to “Published on Web” status to be shared on unbound.org to the general public for funding. However, some

initiatives will be selected to be shared privately with donors outside of unbound.org, in which case they will remain in "Approved by Kansas" status until they are funded.

- Funded: once an initiative receives funding, it will change to this status. Initiatives will only change to this status on the 1st day of a month, when funding is disbursed from Kansas
- Initiative in progress: after an initiative is funded, a user will have the option to mark it as "Initiative in progress." This means that work has started on the initiative beyond the planning phase.
- Final Outcomes Requested: when an initiative is marked as funded, an estimated end date is calculated based on the estimated time needed to complete in days number provided in the Basic Info section. For example, if an initiative is funded on 1 April and the estimated time needed to complete in days is 60, the estimated end date is 1 June, or 60 days after 1 April. On the estimated end date, if the initiative is in Funded or Initiative in Progress status and the initiative was funded by an individual grantor (not from the general Agents of Change Fund in Kansas, which is funded from smaller AC donations), it will automatically change to Final Outcomes Requested to indicate that the final outcomes are due. Final outcomes are not required for initiatives funded from the general AC fund, but they can be saved on the initiative if the project would like to complete them. These are the fields on the Outcome section:
  - Estimated Start Date: this is automatically set by the system as the date on which the initiative is funded.
  - Estimated End Date: this is calculated by the system by adding the estimated time to complete in days to the estimated start date. If an initiative is funded on 1 April and is estimated to take 60 days to complete, the Estimated End Date is 1 June.
  - Estimated time Frame: this is the number of days entered in the Basic Info section in the Estimated time needed to complete in days field.
  - Actual Start Date: the date on which work actually began on the initiative, which could be different from the estimated start date.
  - Actual End Date: the date on which the initiative was completed, which could be different from the estimated end date.
  - Actual Time Frame: the difference in days between the Actual Start Date and Actual End Date. This is calculated by the system.
  - Approximately how many families benefited when the initiative was completed?: Please enter the number of families that benefited from the initiative.
  - If the number of families is different than the original proposal, please explain why: If the number of families benefited is different than the estimated number of families impacted in the Basic Info section, please explain the difference. If the number is the same, there is no need to complete this field.
  - Briefly describe the needs or challenges that the initiative solved (These should be similar to the proposal; if it is not, please explain.)
  - What challenges did you encounter while working on the initiative? How did you solve these challenges?
  - What lessons were learned from implementing this initiative? (Please describe whether you would do anything differently if you implemented this initiative again in the future.)
  - Outcome Photos: it is required to upload at least 1 photo of the completed initiative, and it is possible to upload up to 3. The photo(s) must have horizontal orientation and dimensions of 1200 pixels in width and 800 pixels in height. A caption must be entered and saved for each photo.
- Final Outcomes Pending Kansas Approval: once the final outcomes are approved by the project, the initiative will have this status
- Final Outcomes Kansas Approved: Kansas has approved the final outcomes
- Final Outcomes Kansas Declined: Kansas has declined the final outcomes

- Initiative completed: if final outcomes were required, once the initiative is in Final Outcomes Kansas Approved status, the project can mark the initiative completed. If the initiative did not require final outcomes because it was funded from the general AC fund, it can be marked completed after it is marked Initiative in Progress once the work has been completed.
- Initiative Inactivated: if an initiative has been submitted to Kansas but is no longer needed or will not be completed, a Kansas user can inactivate it.

14.3 **Search Initiatives Page**

The Search Initiatives Page has the following search filters:

- Project
- Zone
- Sub
- Community group
- Status: these statuses are selected by default because they indicate that the initiative needs action at the project/zone/sub level:
    - Initiative created: the initiative has been created and saved.
    - Pending Project Approval: the Basic Info section of the initiative has been saved with at least 1 "before" and 1 "group" photo and is awaiting project approval
    - Ready to Submit: the initiative has been approved by the project and can be submitted to Kansas when allotments are available and/or when the initiative has been prioritized by the project.
    - Declined by Project: the initiative has been declined by the project.
    - Declined by Kansas: the initiative has been declined by Kansas.
    - Funded: the initiative has received funding and work can begin
    - Initiative in Progress: a user has indicated that work has begun on the initiative.
    - Final Outcomes Requested: if the initiative was funded by an individual grantor and not from the general AC fund in Kansas, the initiative will be changed to this status when the estimated end date is reached (the funded on date plus the estimated time to complete the initiative)
    - Final Outcomes Kansas Declined: the final outcomes have been declined by Kansas

  Additional statuses can be selected if needed. These statuses indicate that the initiative needs action at the Kansas level or has been completed or inactivated:
    - Pending Kansas Approval: the Basic Info section of the initiative has been sent to Kansas and is waiting on Kansas review.
    - Approved by Kansas: the initiative has been approved by Kansas. It is waiting to be published to the web for the general public to fund or it has been assigned to the workplace or large donor funding source.
    - Published on Web: the initiative is on the unbound.org website and available to be selected by a grantor for funding.
    - Final Outcomes Pending Kansas Approval: the final outcomes have been submitted to Kansas and are awaiting review.
    - Final Outcomes Kansas Approved: the final outcomes have been approved by Kansas.
    - Initiative Completed: the final outcomes have been approved and published on the unbound.org website for the donor to view. The donor will receive a specific link to the outcomes. The outcomes will not be available for the general public.
    - Initiative Inactivated: the initiative was inactivated by a Kansas user after it was submitted to

Kansas, possibly because the initiative is no longer needed.

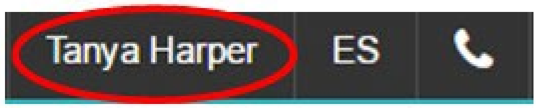
- Category:
  - Roads and Bridges
  - Education
  - Water
  - Hygiene
  - Health
  - Church
  - Community progress
  - Electricity
- Funding Source:
  - Web: the initiative is assigned to the website, unbound.org to be funded by the general public
  - Workplace: the initiative is assigned to the workplace funding source, meaning the Market Development team is working with a company to fund it.
  - Large Donor: the initiative is assigned to the large donor funding source, meaning the Planned Giving team is working to fund it through an estate or other donor who has donated a large sum to Unbound.
- Requested grant amount in USD
- Estimated number of families impacted
- Final outcomes due: a date range that can be used to search for initiatives with final outcomes due within a certain time period

Search Results: after completing a search, the search results grid shows the following columns:

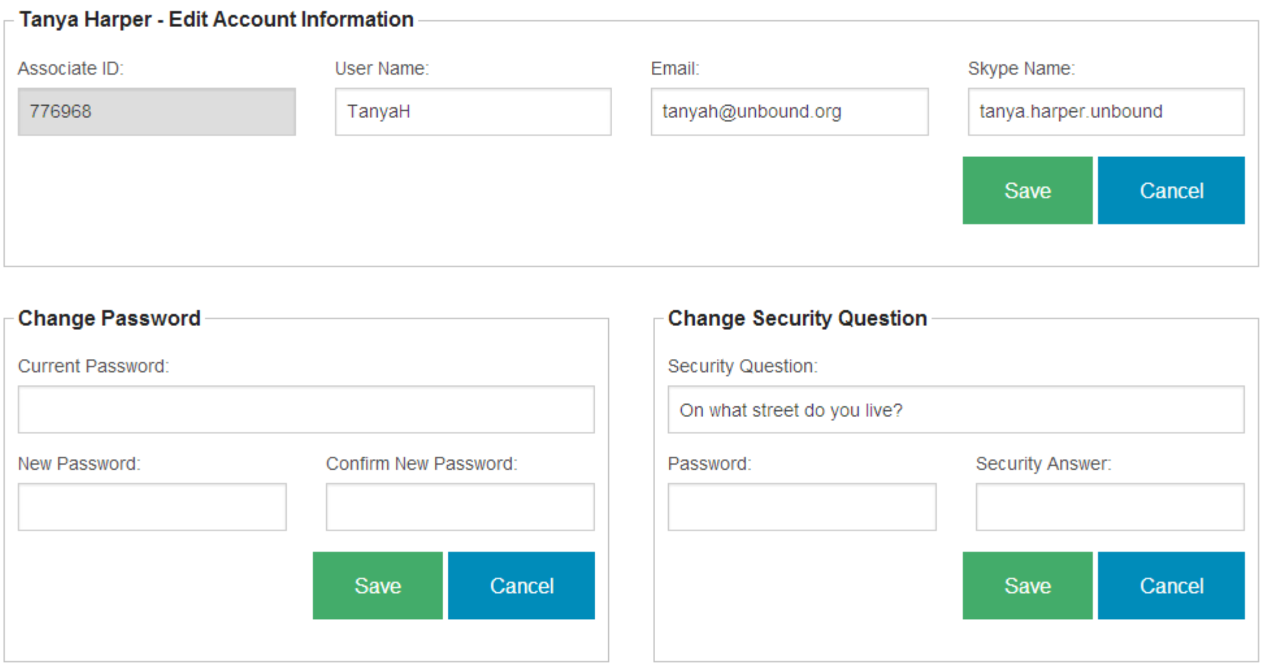
- Initiative ID: a hyperlink that opens the specific initiative in a new tab
- Country
- Project
- Zone
- Sub
- Title
- Status
- Category
- Requested grant amount
- Estimated time needed to complete
- Funded on
- Estimated completion date
- Funding Source
- Excel: clicking this button download the search results in an Excel file

15 My Account

The My Account page can be accessed by clicking on your name at the upper right-hand corner of the screen:



On this page, each user will see the following information:

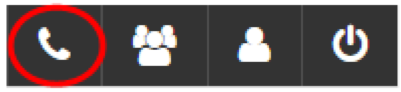


- Associate ID: the ID created for each Portal user in the Kansas database. It cannot be changed.
- User Name: the username created when signing up for Portal. It can be changed to a different username as long as it is not already in use by another user. Click “Save” to save changes.
- Email: the email of the user provided when signing up for Portal. It can be changed by the user but it must be a valid email format. Click “Save” to save changes.
- Skype Name: the Skype name of the user. It can be changed. Click “Save” to save changes.
- Change password: to change a password, the user must provide his/her current password, type a new password, and confirm that new password by typing it again. The password must be at least 8 characters long, have one lower-case letter, one upper-case letter, one numeric digit and one special character. Click “Save” to save changes.

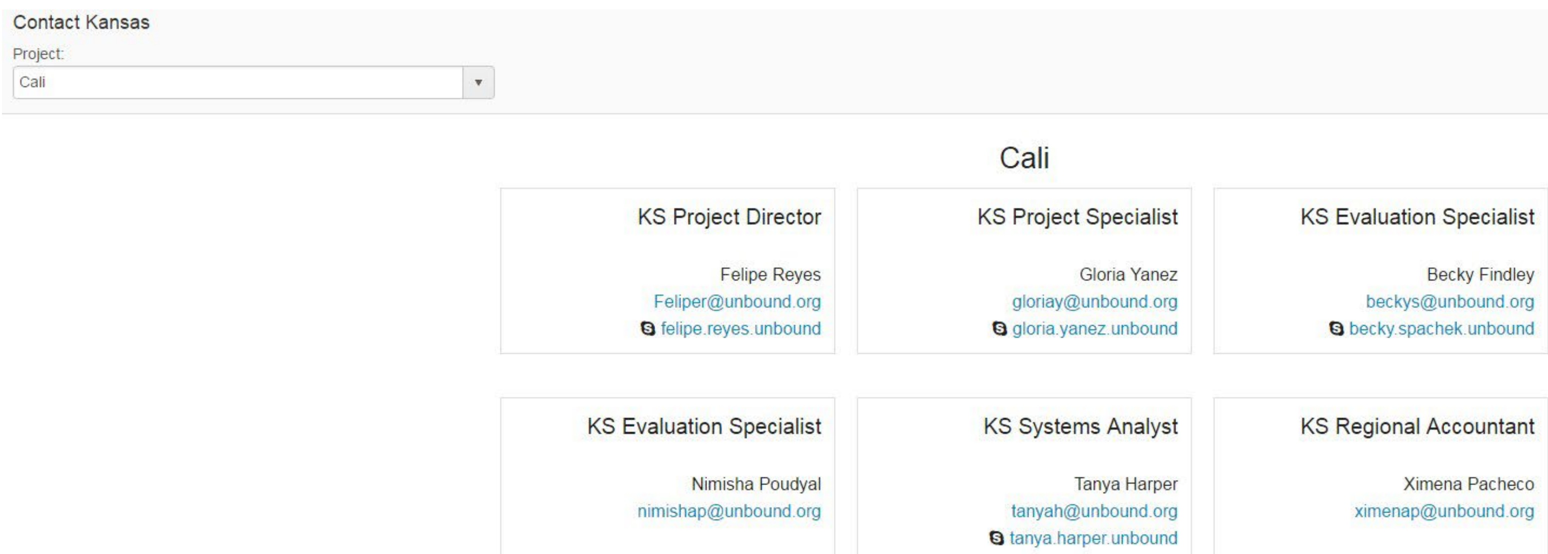
- Change security question: to change a security question, a user must enter his/her current password and then enter both a security question and security answer. Click “Save” to save changes.

16 Contact Kansas

The Contact Kansas page can be accessed by clicking on the “Contact Kansas” icon at the upper right-hand corner of the screen.

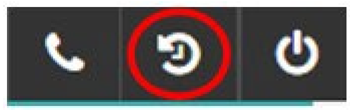


The project to which the user has access will default. On this page, you will see the members of your regional team in Kansas, which includes the Project Director, Project Specialist, and Financial Auditor. You will also see the Kansas Evaluation Specialists and Systems Analyst, who work with all projects. Contact information for all of these people is included on this page.



17 Release Notes

The Release Notes page shows the history of changes made to Portal. If changes have been made to Portal since the last time a user logged in, he/she will be directed to the Release Notes page, where the most recent changes will be described. If no changes have been made since the last time the user logged in, he/she will be directed to the Portal home page. All users can see the Release Notes page at any time by clicking on the Release Notes icon in the upper right-hand corner of Portal.



18 Roles

Each Portal user is assigned one or more roles, which determines which information he/she can access. Each user is also assigned to either the entire project, one or more zones, or one or more subprojects. A user with access to the entire project automatically has access to all zones and subprojects within that project. A user with access to a zone automatically has access to all subprojects within that zone. A user with access to only one subproject only has access to that subproject, not to information from any other subproject or zone. All roles have the same access to the Home, My Account, and Contact Kansas pages. Differences in access are determined by the project(s), zone(s) and sub(s) assigned and according to the role, as specified below.

18.1 Types of reports

There are four main types of reports in Portal: financial reports, sponsored member reports, mail reports and photo reports. Some roles have access to all reports. Other roles have access to only one or two report types.

Financial reports are:

- Education Funds
- Financial Detail
- Financial Memo

Sponsored member reports are:

- Available Records
- Beneficiaries with Pending Items
- Beneficiary List
- Community Group Detail
- Community Group Summary
- Digital Letters Uploaded
- Farewell Letters in Kansas
- Letters Declined
- Original Letters Not Received in Kansas
- Packets Received in Kansas
- Pending Project & International Communications
- Pending Speed Letters
- Pending Update Requests
- Photo Reminders
- Regular Letter Reminders
- Retired Member List
- Welcome Letter Reminders
- Welcome List

Mail reports are:

- Mail Received
- Mail with No Reply Letter Sent

Photo reports are:

- Photos Declined by Kansas
- Photos Declined by Project

18.2 Role Types

The following roles are available in Portal:

- Coordinator
- Project Admin
- Correspondence Staff
- Social Worker
- Lead Accountant
- Assistant Accountant
- Internal Translator
- Trips Staff

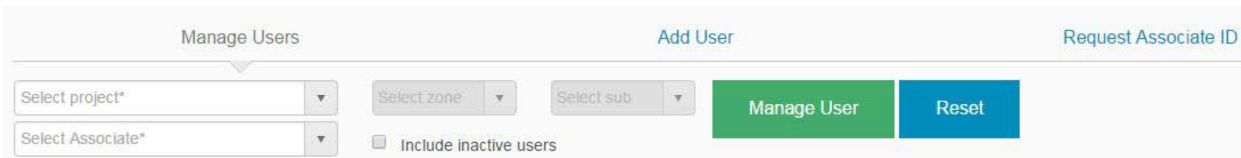
16.2.1 Table of Portal Access by Role

Note: All security will be applicable only to the projects/zones/subs to which a user has access in Portal (e.g. a user could only view reports or search results for a subproject to which he/she has access).	Project Admin	Coordinator	Social Worker	Correspondence Staff	Lead Accountant	Assistant Accountant	Internal Translator	Trips Staff
Search								
Perform searches	X	X	X	X	X	X	X	X
Reports								
Sponsored member reports	X	X	X	X	X	X	X	X
Financial reports	X	X			X	X		
Mail reports	X	X	X	X				
Photo reports	X	X	X	X				
Download monthly Access database (project level only)	X	X			X			
Photos								
Upload batches of photos	X	X	X	X				
Review (approve or decline) photos	X	X		X				
Mail	**X**	**X**	**X**	**X**			**X**	
Digital Letters								
View digital letters	X	X	X	X	X	X	X	X
Review digital letters	X	X	X	X			X	
Family records								
View records allotment (project level only)	X	X	X	X	X	X	X	
View records	X	X	X	X			X	
Edit records	X	X	X	X			X	
Submit a record to Kansas (project level only)	X	X		X				
Manage custom fields, areas and community groups	X							
Modify community group and representative details	X	X	X	X				
Exit page								
View, create and edit exit pages	X	X	X	X			X	
Submit exit pages to Kansas (project level only)	X	X		X				
Trips page								
View trips reports	X	X						X
Other								
My Account	X	X	X	X	X	X	X	X
Contact Kansas	X	X	X	X	X	X	X	X
Account Management	X							

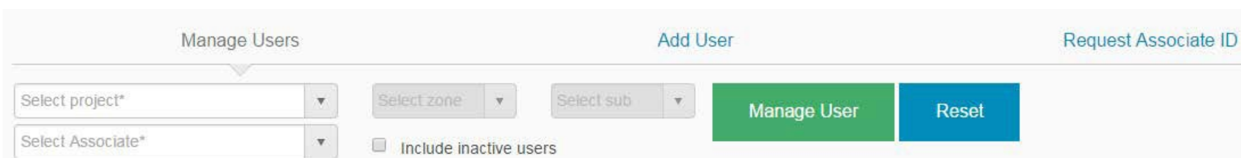
17 Account Management

The Account Management icon is only available for Portal users with the Project Admin role:

There are three tabs within the Account Management tab: Manage Users, Add User, and Request Associate ID:



17.1 Manage Users

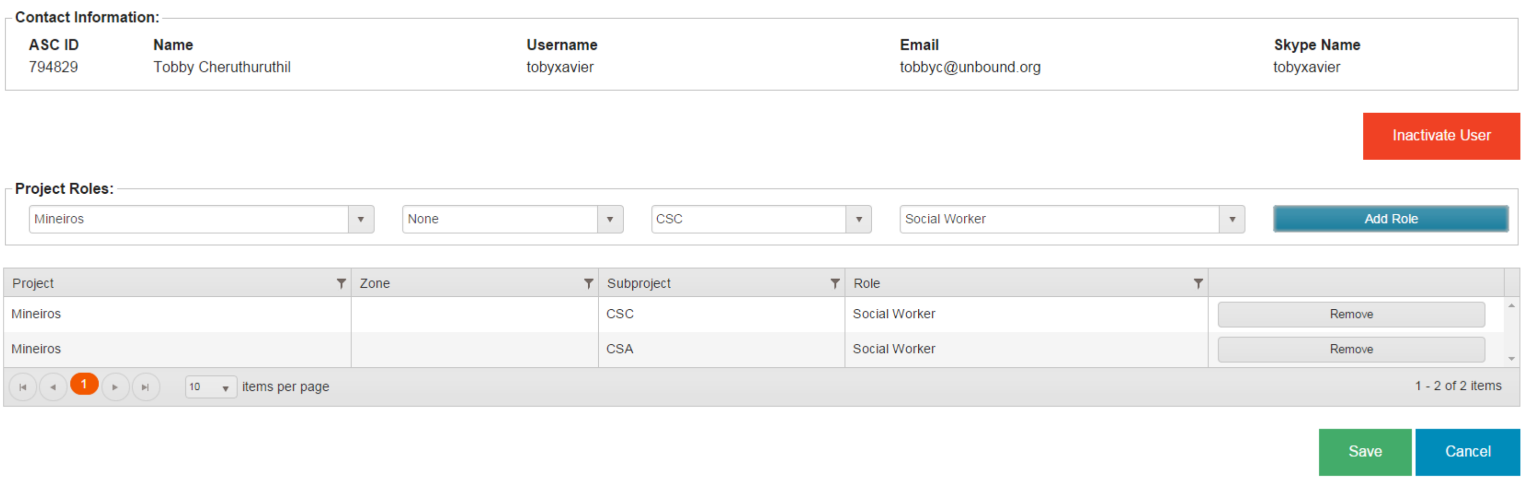


To add or remove Portal access for a Portal user who has already registered, click on the Manage Users tab. The project will be defaulted in the “Select Project” drop-down menu for all Project Admins. If the Project Admin only has access to one zone, the zone will be defaulted in the “Select Zone” drop-down menu. Otherwise, to select a subproject, the Project Admin will have to either select a zone or “None” in the zone drop-down menu to see users with access to only one zone. If the Project Admin only has access to one subproject, the subproject will be defaulted in the “Select Subproject” drop-down menu. Otherwise, the Project Admin will have to select a subproject to see users with access to only one subproject.

After the project, zone, and/or subproject are selected, click on the “Select Associate” drop-down menu to view users with access to that project, zone, or subproject, select a user, and click, “Manage User.” To clear the selected user, click “Reset.”

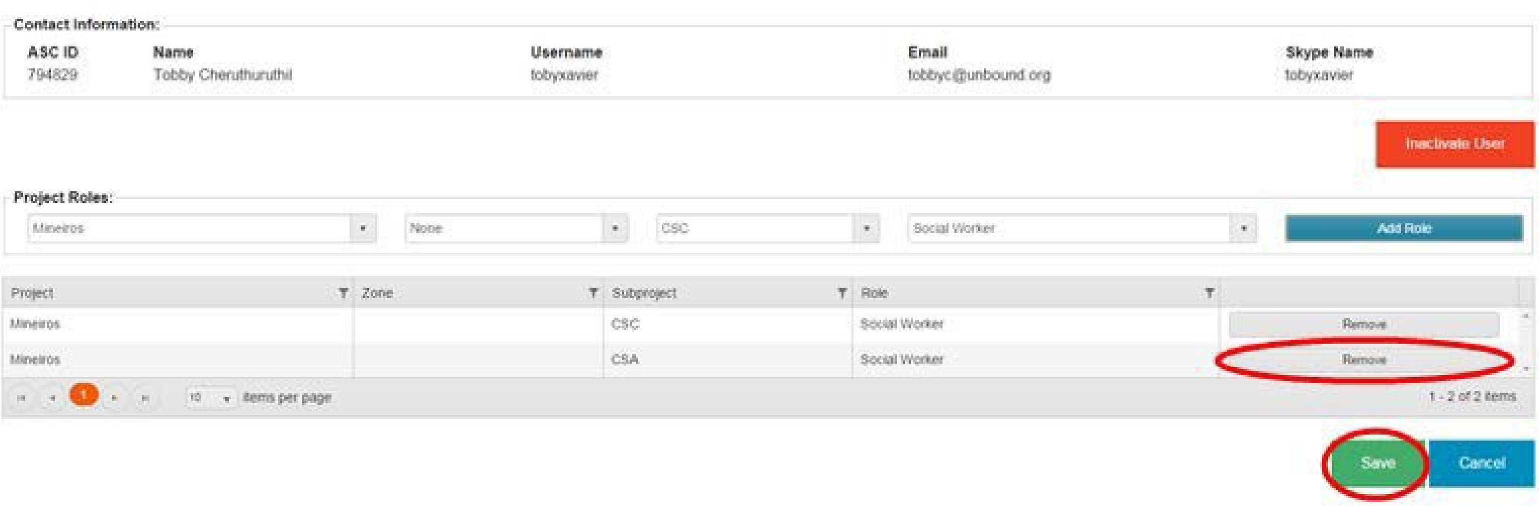
17.1.1 Adding Portal access

To add access to a user, select the project, zone, and/or subproject to which the user should have access. Also select the role that the user should have within Portal. Click on “Add Role” to populate this information in the “Project Roles” table. Click “Save” to save the information. To clear the access and not save it, click “Cancel.” If a user needs access to more than one zone or subproject, repeat these steps for each zone or subproject. If a user should have more than one role in Portal, repeat these steps for each role. If a user has Portal access at only the project level, he/she will also have access to each zone and subproject in that project. It is not necessary to add access to each individual zone and subproject. If a user has access at the zone level, he/she will also have access to each subproject within that zone. It is not necessary to add access to each individual subproject.



17.1.2 Removing Portal access

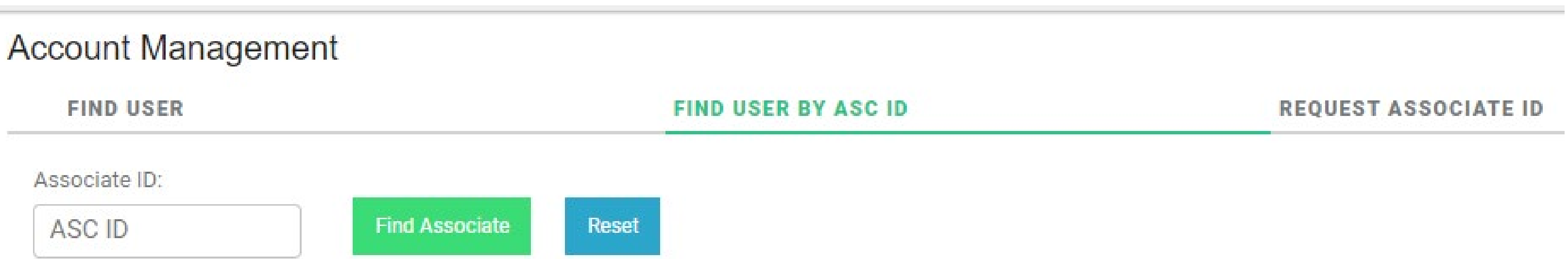
To remove Portal access from a user, select the user from the "Select Associate" drop-down menu and click, "Manage User." Click "Remove" on the row that corresponds to the access that should be removed to delete the row. Then click "Save." If the row is removed by mistake, click, "Cancel" before saving to restore the row to the table. Repeat these steps as necessary to remove access for the user. If a user is no longer employed by Unbound, all roles should be removed immediately to remove all of their Portal access, including roles that belong to inactive projects, zones and/or subprojects.



17.1.3 Page navigation

- Page navigation buttons: these buttons at the bottom of the Manage Users page can be used to navigate to the first, previous, next, or last page of users.
- Page number buttons: click on a specific page number to navigate to that page of the list of users
- Items per page: this drop-down menu can be used to change the number of users that display per page to either 5, 10, or 20.
- Items displayed: in the bottom right-hand corner of the search results grid, the number of users currently displaying and the total number of users can be seen, for example, 1- 10 of 15 items.

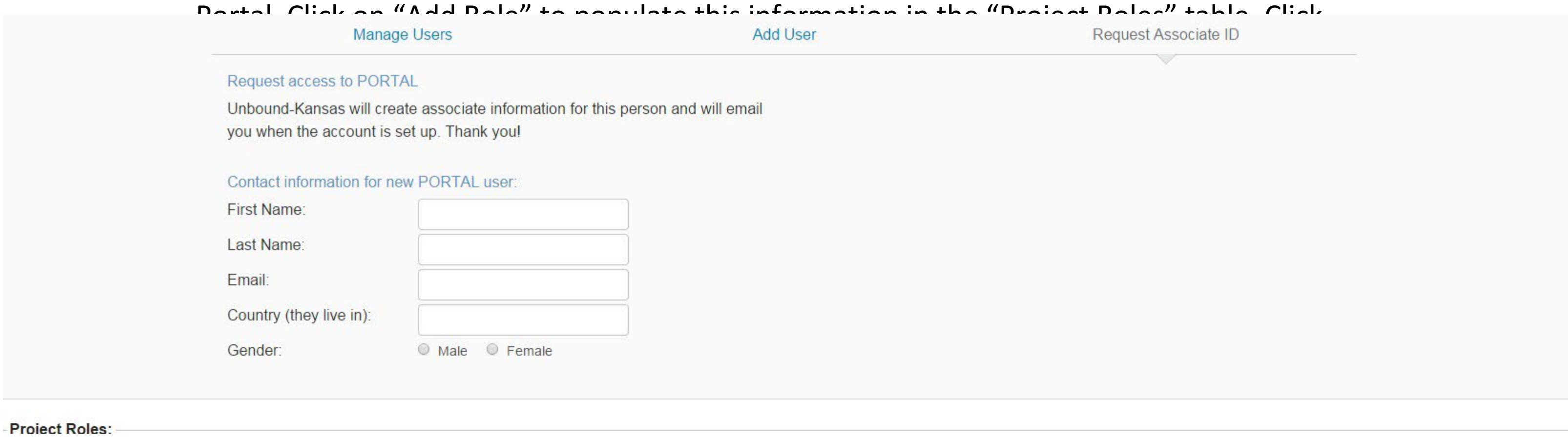
17.2 Find User by ASC ID



The Find User by ASC ID tab can be used to add Portal access to a user who has already registered but does not yet have access to a project, zone, and/or subproject of which his/her regular Project

Admin is in charge. For example, if a Portal user from Project A needs temporary Portal access to Project B, the Project Admin from Project B would use the “Add User” tab to give this user access to Project B. The Project Admin from Project A would not have the ability to do this because he/she can only grant Portal access to Project A.

To add access for a user using the “Find User by ASC ID” tab, enter the Associate ID of the user that needs access and click, “Find Associate.” After selecting the project, zone, and/or subproject to which the user needs access, select the role that the user should have within Portal. Click on “Add Role” to populate this information in the “Project Roles” table. Click



17.3 Request Associate ID

The Request Associate ID tab is used to request Portal access for a user that has never used Portal or the Digital Photos website before. Complete the top form with the information requested:

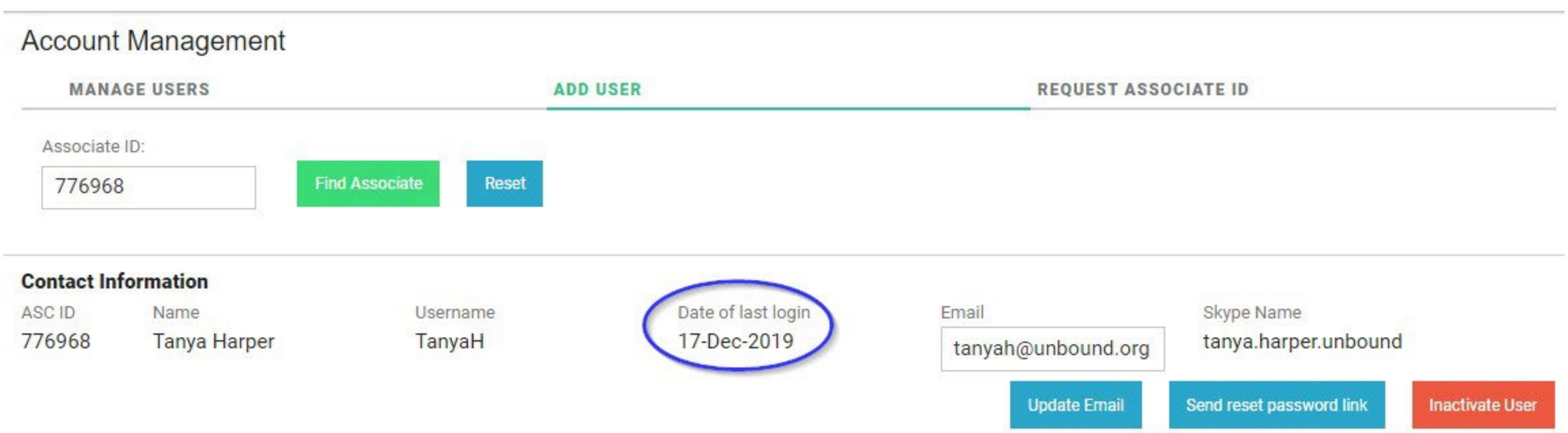
- First Name: the user's first name
- Last Name: the user's last name
- Email: the user's work email address. Only valid email formats will be accepted
- Country (they live in): the country where the user lives and works
- Gender: the user's gender, either male or female

Select the project, zone, and/or subproject to which the user should have access and click, "Add Role." If the user should have access to more than one zone or sub, or if he/she has more than one role, add each level of access and click, "Add Role." Click "Submit" to submit the Associate ID request to Kansas. To cancel without saving changes, click, "Cancel."

Completing this Request Associate ID form will generate an email to Unbound-Kansas. Once the Associate ID is created in Kansas, a Kansas employee will email the Project Admin with the Associate ID so that the user may register for Portal.

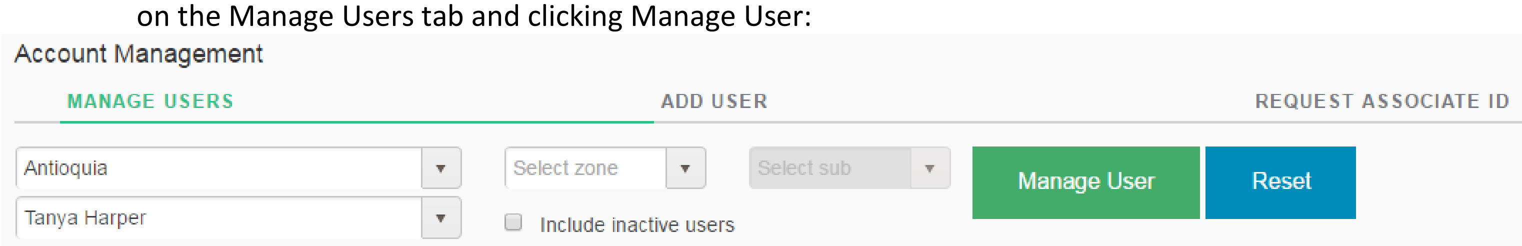
17.4 Date of Last Login

The date of last login to Portal or the Translation Module can be seen for each user.

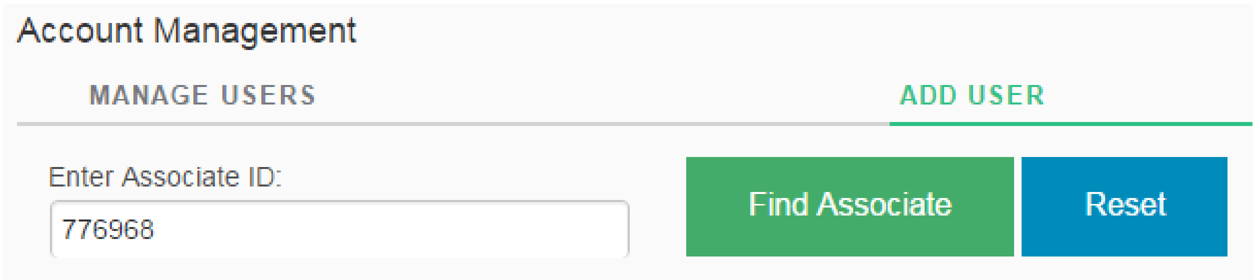


17.5 Send Reset Password Link

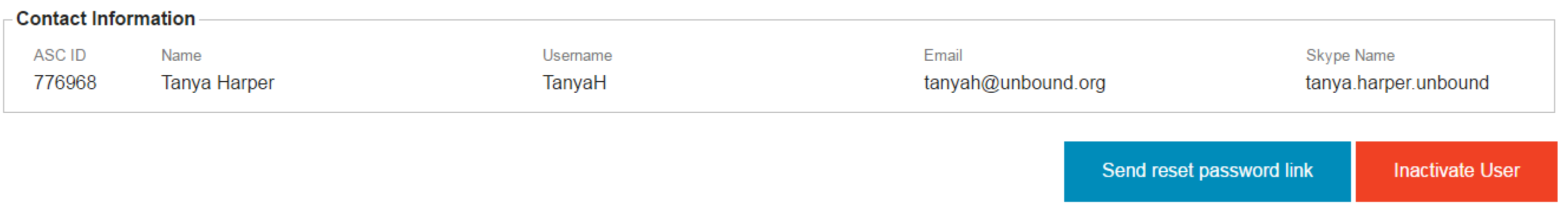
To send a reset password link to another user in the project, zone or subproject to which you have access, find the user by selecting his/her name from the Select Associate drop-down menu on the Manage Users tab and clicking Manage User:



Or enter the user's ASC ID on the Add User tab, then click Find Associate:



Click "Send reset password link" to send a link to the email address listed for the user. This link will expire after 5 days.

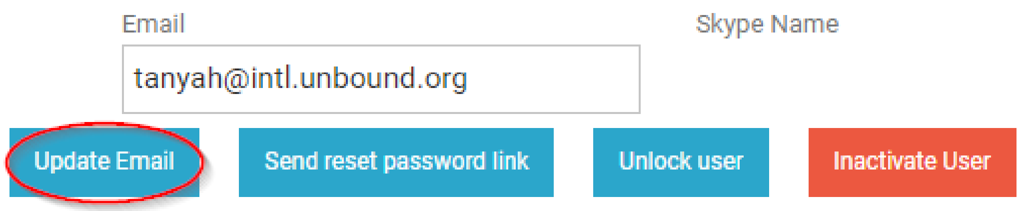


17.6 Unlock user

If a user enters the incorrect password in Portal too many times, his/her account will become locked. To unlock the account, find the user by selecting his/her name from the Select Associate drop-down menu on the Manage Users tab and clicking Manage User or enter the user's ASC ID on the Add User tab, then click Find Associate, then Manage User. If the account of the user is locked, you will see an "Unlock account" button. Click this button to unlock the account.

17.7 Update email account of another user

If the email address of a user changes, it is always recommended to update the email address in Portal so that he/she can reset his/her password if necessary. The user can update his/her own email via the My Account page, but the Project Admin can also update it if necessary via the Account Management Page. Simply find the user using the drop-down menus on the Manage Users tab or enter his/her ASC ID on the Add User tab and click Manage User. Enter the updated email address for the user and click “Update Email.”

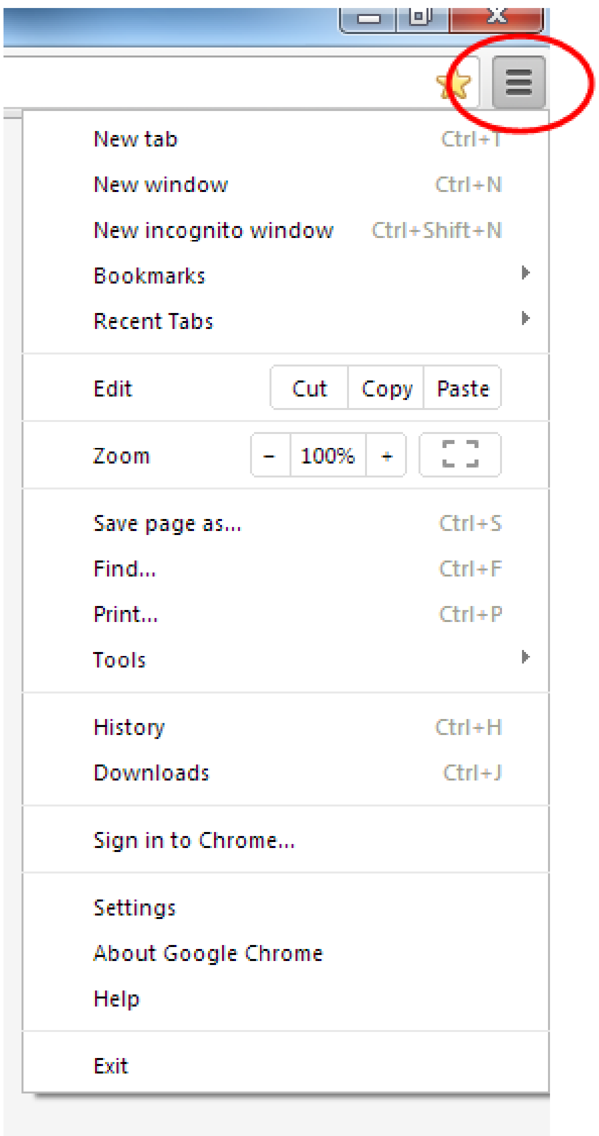


18 Appendix

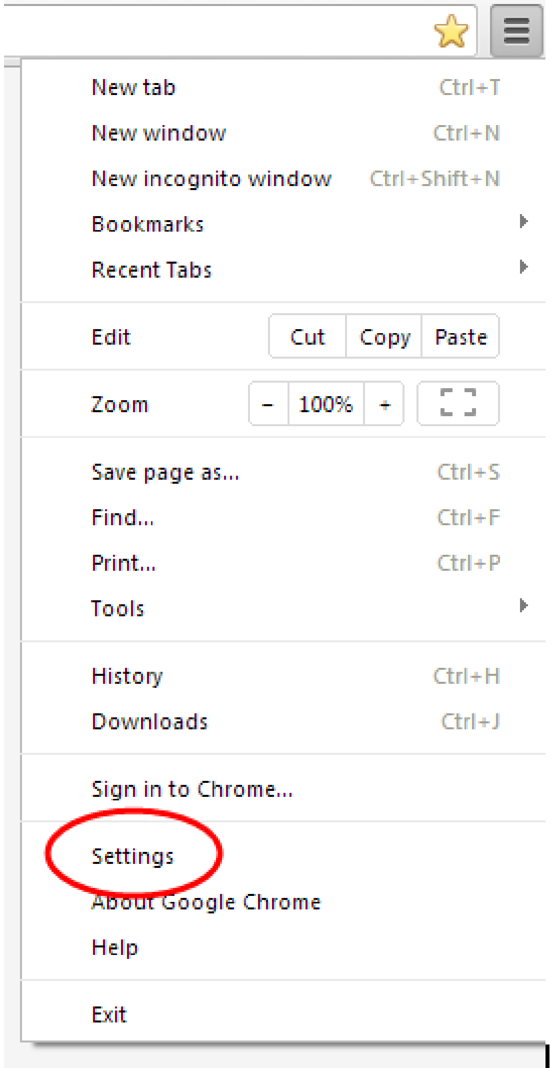
18.1 Changing the default language of Google Chrome

The default language of Portal is determined by the default language of Google Chrome. While the language of Portal can always be changed between English and Spanish once a user logs into Portal, to change the default language, complete the following steps:

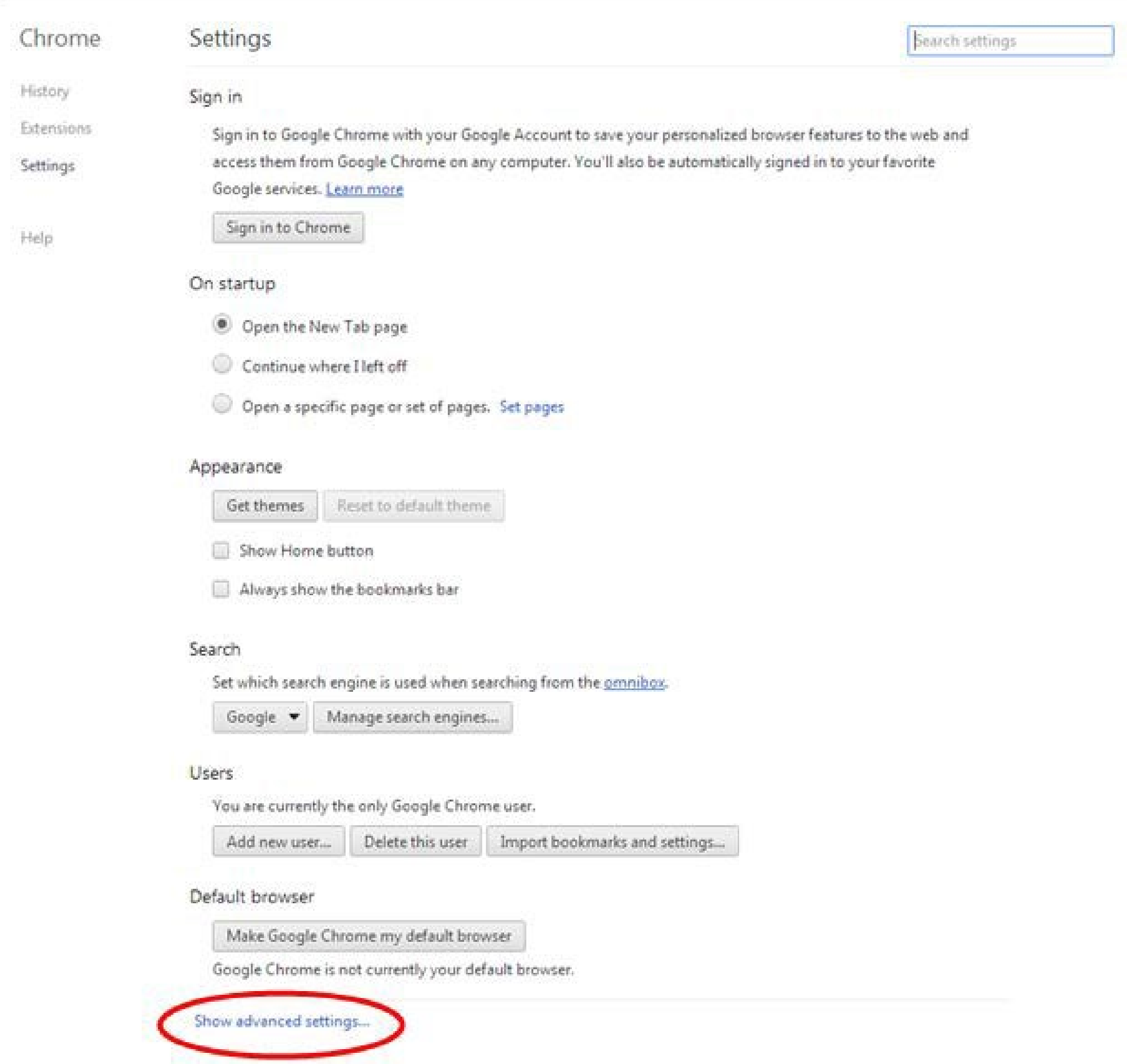
Open Google Chrome and click on the settings menu (the three bars) in the upper right-hand corner:



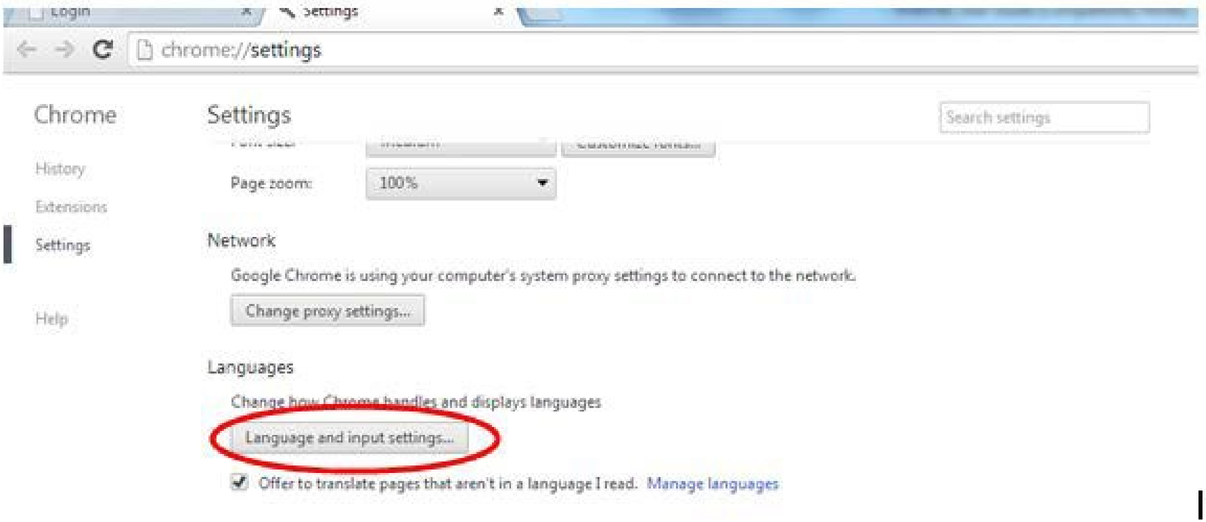
Click on Settings:



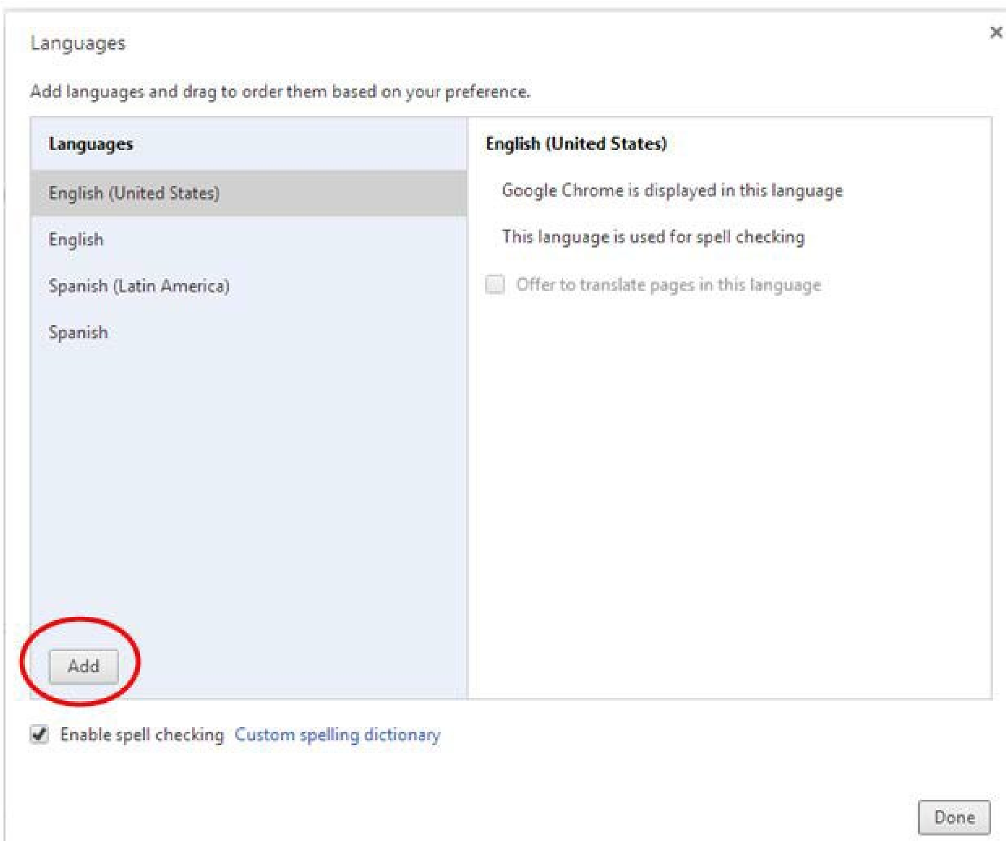
Click on “Show Advanced Settings”:



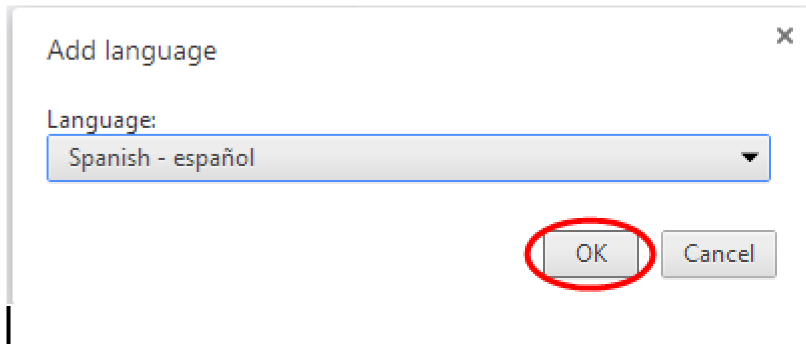
Scroll down and click on "Language and Input settings":



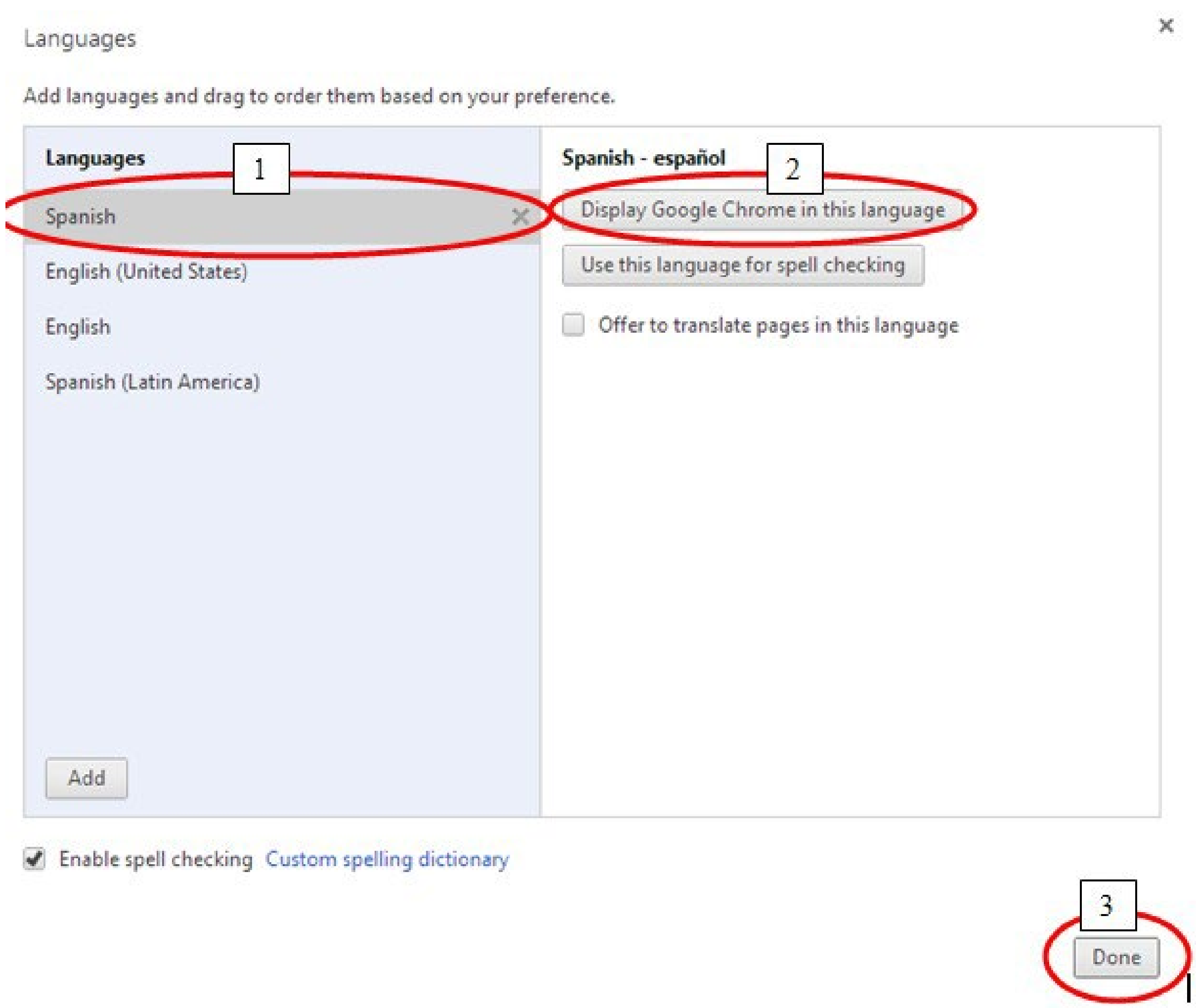
If English or Spanish is not in the list of languages, click "Add" to add it:



Select the desired language from the drop-down menu and click OK:



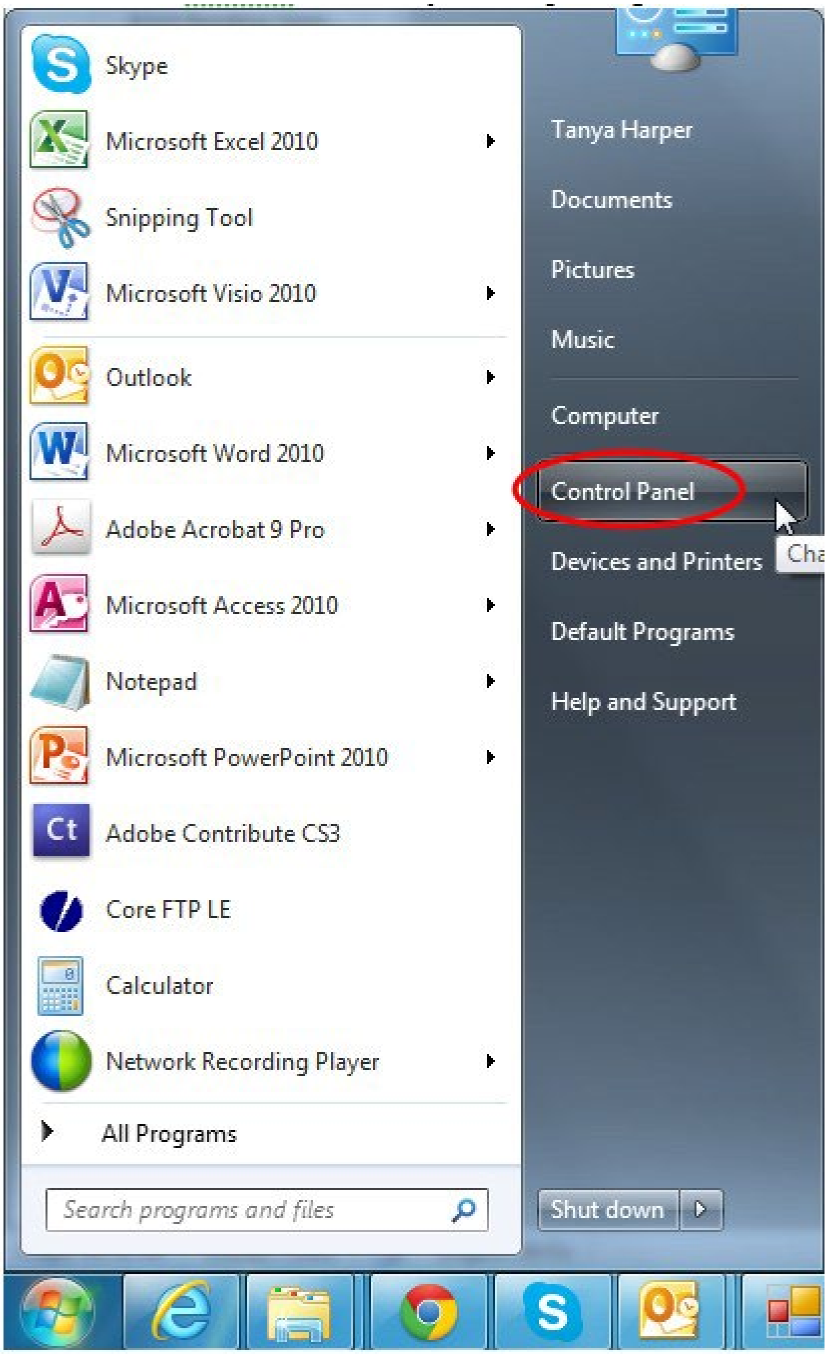
Drag the desired language to the top of the list of languages on the left-hand side, click “Display Google Chrome in this language,” and click “Done”.



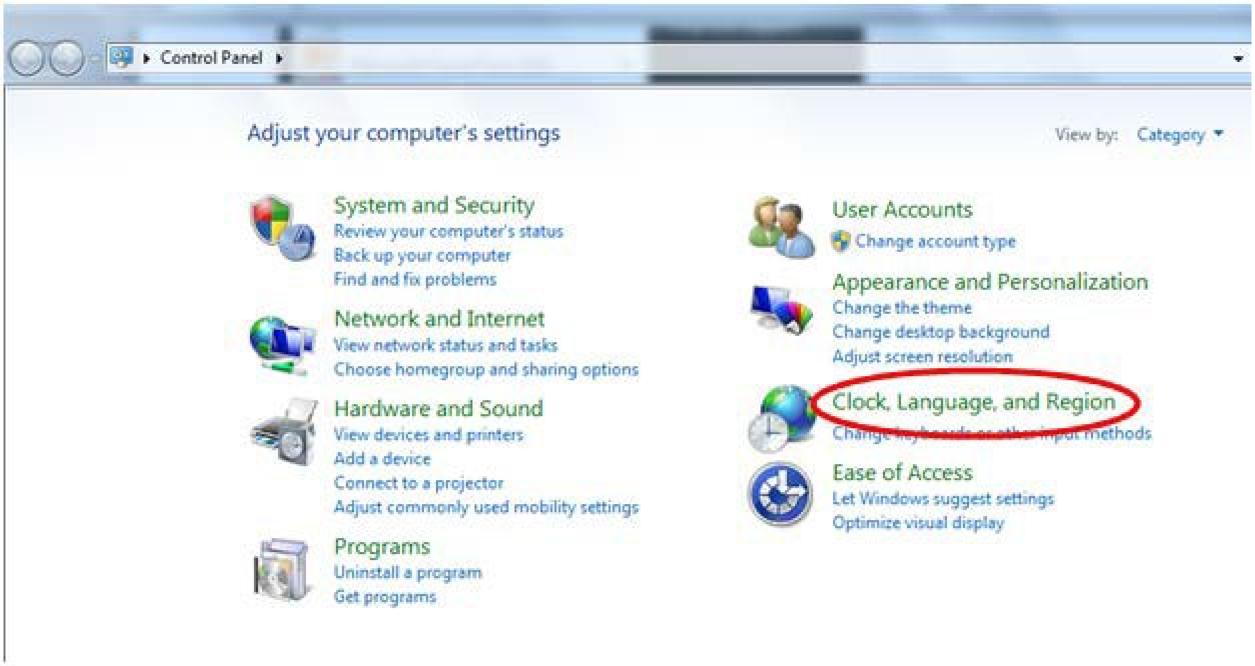
Close Google Chrome and re-open it. Portal should now display in the selected language by default.

18.2 How to determine or change the date format of your computer.

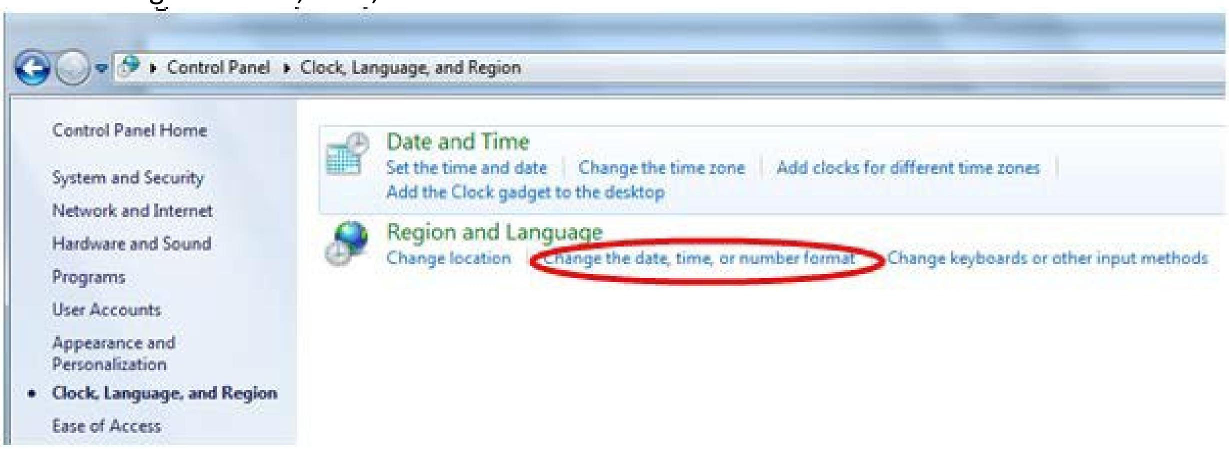
To determine the date format of your computer, go to the Start menu and click on Control Panel.



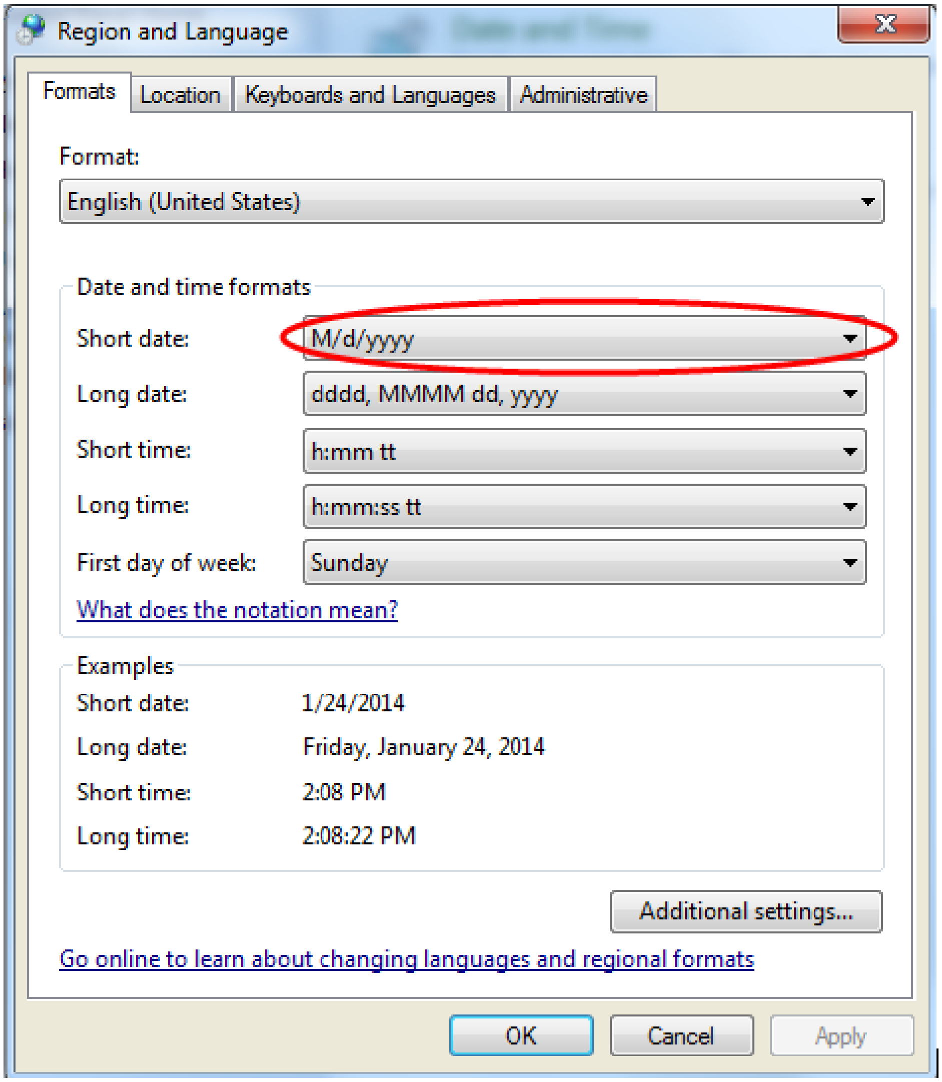
Select Clock, Language, and Region:



Select Change the date, time, or number format:



Note the Short date format:



If the short date format is dd/mm/yyyy, then the dates displayed in Excel will match the dates displayed in Portal. If the short date is something different, and you would like to change it to match Portal, choose a format with a short date format of dd/mm/yyyy, for example, English (Canada). **Please note that this may affect other programs on your computer besides Excel.**