Meal Magic®

Family Portal

Quick Start

WELCOME TO FAMILY PORTAL

Before households can submit applications or Education Benefits forms (EBFs), you need to configure settings in Meal Magic Cloud Administration to activate the service.

PART I – DATA TO BE COLLECTED

Family Portal needs to know what information you want to collect from households. You can collect applications, Education Benefits forms, or both.

1. Go to **Management > District**.
2. Click the "Rates" tab. Notice that there are Income Eligibility Guidelines available for both the current school year and the upcoming school year. Around June, you will need to enter values for the next school year before collecting documents in July.
3. Click the "Special" tab.
4. The previously built-in "Medicaid" Special Consideration no longer exists. If you need to ask about sharing information with this program, add "Medicaid" to the list.
5. Click the "Applications / EBFs" tab.
6. In the "Family Portal Preferences" section on the right, complete the following:
   a. Indicate what demographic information is needed. Select "No" if you do not want parents to be asked, "Yes" if you do, or "Required" if a response must be entered.
   b. Mark any income frequencies you do **NOT** want to be shown.
   c. <u>**VERY IMPORTANT**</u>: For "Accept These Documents" mark which documents you need to collect.
      i. To collect applications, make sure the "Applications" box shows a checkmark.
      ii. To collect Education Benefits forms, make sure the "EBFs" box shows a checkmark.
      iii. If you want to include opt-in/opt-out special considerations, make sure the "with Special Considerations" box next to the appropriate document type shows a checkmark.
      iv. **If neither document type is checked, the "Apply for Benefits" button cannot be clicked on Family Portal.**
   d. Select "Accept For These Years" options.
      i. Checking "Current" allows submissions for the current school year. This is the year that is active when you first log into Meal Magic Cloud). Collection stops after June.
      ii. Checking "Upcoming" allows submissions for the new school year. This is the next year that will be active after you close the current year. Collection begins July 1.
      iii. **If neither is checked, the system will default to "Current". Also, after you close a year, the system will revert to only "Current" being selected.**
   e. If you check the "EBF Income Format" box, incomes will be presented as simple ranges based on family size; otherwise, incomes will be entered as typed amounts by source.

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   f. <u>**VERY IMPORTANT**</u>: **Click Save**.
7. Go to Management > Security > Licenses.
8. Locate your "District ID" on the page. Use this to direct parents to your district's dedicated Family Portal login page. For example. If the "District ID" is "acme", your parents need to go to https://acme.familyportal.cloud to use Family Portal (the **https://** is very important). Once at your Family Portal site, parents without an account will need to click "**Apply For Benefits**" to submit an application or Education Benefits form.

PART II – DOCUMENTS

You can change the entire introductory letter that is shown to parents and guardians when they elect to apply for benefits online If your district collects both applications and EBFs, you also can customize information on choosing which document the parent should complete . **Do not change either of the two "Dear Parents" documents unless required by your state.**

<u>**VERY IMPORTANT**</u>: *Items contained in squared brackets, such as **[DistrictName], [Pricing Chart], [Income Chart],** and **[SNAP]** are special placeholders. In most cases, you should not change these items. The information named within the brackets will be inserted from your district settings when the document is displayed on Family Portal. Items such as **[AppealsContact]** will expand to show name, address, phone number, and email address; and **[CEP Schools]** and **[Non-CEP Schools]** will insert alphabetized lists of schools according to the named type. The **Insert Data Field** dropdown lets you add other bracketed items to simplify editing.*

To edit a document:

1. Go to Management > Family Portal > Document Editor.
2. Select the Document you want to edit from the dropdown list. Documents include:
  a. Application Instructions – this is the "Dear Parents" document for applications
  b. EBF Instructions – this is the "Dear Parents" document for Education Benefits forms
  c. Choice Instructions – this provides instructions for choosing between application and EBFs
3. Click the "Load" button.
4. After the document loads in the editor, review the contents, and make any changes needed for your state. The "Insert Data Field" dropdown can be used to add placeholders for information that will be displayed when the document is shown on Family Portal.
5. When finished editing, click the "Save" button.

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