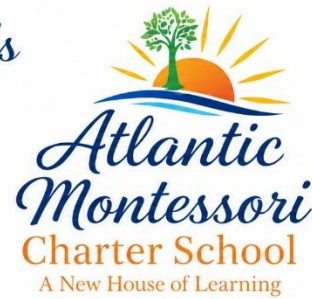

Atlantic Montessori Charter Schools

#5029 & #5164
2550 South Flamingo Road
Davie, FL 33325
954-423-9704



Dear Eagle Staff,

Welcome to your newly redesigned Atlantic Montessori Charter School website and Employee Portal! We've built a comprehensive system that gives you everything you need in one place — from clocking in and managing PTO, to conducting classroom walkthroughs, approving volunteer hours, and accessing staff resources.

This email is your **complete, step-by-step guide** to every feature now available to you. We recommend saving this email for future reference!

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1 EMPLOYEE PORTAL OVERVIEW & ACCESS

The Employee Portal is your central hub for all staff-related tools and administrative functions. It's separate from the public website — accessible only to Atlantic Montessori Charter School staff.

How to Access the Employee Portal

1. Go to **amcharterschool.org/employee-portal**
2. You'll see the Employee Portal landing page with options to:
 - **Log In** (if you've already registered)
 - **Register for an Account** (if you're an existing employee setting up for the first time)
 - **Complete New Hire Onboarding** (if you're a brand-new hire)

Portal Navigation

Once logged in, the portal has **five core navigation tabs**:

Tab	What It Does
Home	Your staff dashboard with quick-access cards to all portal tools
Time Clock	Clock in/out, view your time records
Resources	Staff documents, policies, forms, and handbooks
Walkthroughs	Conduct and review classroom walkthroughs
PTO	Submit and track paid time off requests

Additional tools (Volunteer Management, Eagle Bank, Onboarding Management, PTO Management, Focus Requests, etc.) are accessible via direct links or from the public website with admin login.

2 STAFF REGISTRATION (For Existing Employees)

If you're an existing employee who hasn't set up your portal account yet, here's how to register:

How to Register

1. Go to **amcharterschool.org/employee-portal/register**
2. Enter your **Staff ID Code** (assigned to you by administration — if you don't have yours, contact the front office)
3. Enter your **First Name**
4. Enter your **Last Name**
5. Enter your **Email Address**
6. Create a **4-digit PIN** (you'll use this to log in and clock in/out)
7. Confirm your PIN
8. Click "**Register**"

What Happens After Registration

- Your account is created and marked as "**Registered**"
- You'll receive a **confirmation email** at the email you provided
- Administration also receives a notification that you've registered
- You can now **log in** to the Employee Portal using your Staff Code + PIN
- You can now **clock in and out** using your Staff Code + PIN at the Time Clock

Important: Your Staff ID Code is assigned by admin. If you don't have one, do NOT guess — contact the front office to get your assigned code before registering.

A Note on PINs

- Your PIN is **4 digits** (numbers only)
- Keep your PIN private — it's your password for the portal and time clock
- Do NOT share your PIN with other staff members
- If you forget your PIN, contact administration to have it reset

3 NEW EMPLOYEE ONBOARDING (For New Hires)

If you're a brand-new hire, you'll complete your onboarding through the portal before registering for a staff account.

How to Complete Onboarding

1. Go to **amcharterschool.org/employee-portal/onboarding**
2. You'll see the **New Employee Onboarding Form**
3. Fill in all required fields:

- **First Name, Middle Name, Last Name**
 - **Social Security Number** (encrypted at rest; visible to HR admin only)
 - **Date of Birth**
 - **Gender**
 - **Email Address**
 - **Phone Number**
 - **Street Address, City, State, ZIP Code**
 - **Position** (your job title)
 - **Position Type** (Teacher or Support Staff / Other)
 - **Expected Start Date**
 - **Emergency Contact Name, Phone, and Relationship**
 - **Referral Source** (how you heard about us)
 - **Additional Notes** (optional)
4. Review your information for accuracy
 5. Click "**Submit**"

What Happens After You Submit

- Your onboarding form is submitted to HR for review
- The status shows as "**Submitted**"
- HR will review your information and either:
 - **Approve** — you'll be assigned a **Staff ID Code** and can then register your PIN
 - **Reject** — you'll be contacted with an explanation
- Once approved and assigned a Staff Code, you can **register your account** (see Section 2)
- You'll receive an email notification with your assigned Staff ID Code and next steps

Your SSN is secure: Social Security Numbers are encrypted at rest and visible only to HR administrators. They are never displayed in full or shared.

STAFF LOGIN & PIN AUTHENTICATION

How to Log In to the Employee Portal

1. Go to **amcharterschool.org/employee-portal/login**
2. Enter your **Staff ID Code** (the number assigned by admin)
3. Enter your **4-digit PIN**
4. Click "**Sign In**"
5. You'll be taken directly to your **Staff Dashboard**

How to Log Out

- Click "**Log Out**" in the top-right corner of the portal navigation bar

- On mobile, open the menu and tap "**Log Out**"

Session Persistence

- Your login session **persists** across browser sessions using local storage
- You won't need to log in every time you visit the portal (unless you log out)
- If you're on a shared computer, always log out when finished

Forgot Your PIN?

PINs cannot be self-reset. If you forget your PIN:

1. Contact administration at mduenas@amcharterschool.org
2. Admin will reset your PIN in the Staff Credential system
3. You'll be given a temporary PIN to log in with
4. Once logged in, you can continue using that PIN

Staff Login Help Guide

A built-in step-by-step help guide is available right on the staff login page. Just click "**How to Manage Volunteer Hours**" to expand a 7-step walkthrough for managing the volunteer portal — useful for any staff member involved in volunteer hour approvals.

5 STAFF DASHBOARD & NAVIGATION

Once logged in, you'll see your **Staff Dashboard** — your home base for all portal tools.

What's on the Dashboard

- **Welcome banner** personalized with your name
- **Quick-access cards** for each portal tool:
 - **Time Clock** — clock in/out, view records
 - **Walkthroughs** — conduct and review classroom observations
 - **PTO** — submit and track time-off requests
 - **Resources** — staff documents and handbooks
 - **Curriculum Center** — curriculum programs and teacher resources
 - **Monty AI** — your AI staff assistant
- **Logout button** (desktop and mobile)

How to Navigate

- Click any **card** to jump to that tool
- Use the **navigation bar** at the top to switch between the five core tabs (Home, Time Clock, Resources, Walkthroughs, PTO)

- Some administrative tools (Volunteer Management, Eagle Bank Dashboard, Onboarding Management, PTO Management, Focus Requests, etc.) require admin login via the main website — see those sections below

TIME CLOCK (Clock In / Clock Out)

The Time Clock lets you clock in and out from any device — desktop, tablet, or mobile phone.

How to Clock In

1. Go to amcharterschool.org/employee-portal/time-clock (or click "Time Clock" in the portal nav)
2. If you're logged in to the portal, you'll see the clock-in widget
3. If you're NOT logged in, you can still clock in using your **Staff Code + PIN** directly on the widget
4. Click "**Clock In**"
5. Your browser will ask for **location permission** — click "**Allow**" (this is for geo-verification, see below)
6. Your clock-in time and location are recorded
7. You'll see a confirmation with your **clock-in time** and **verification status**

How to Clock Out

1. Return to the **Time Clock** page
2. Click "**Clock Out**"
3. Your clock-out time is recorded
4. The system calculates your **hours worked** for that shift
5. You'll see a summary of your shift

Geo-Fence Verification (Soft Check)

- The system checks your location against campus boundaries when you clock in
- This is a **soft check** — you can clock in from anywhere, but your record is flagged as either:
 -  **Verified** — you were within range of campus
 -  **Unverified** — you were outside the expected range
- Unverified clock-ins are **not blocked** — they're flagged for admin review
- If your clock-in shows as "unverified" but you were on campus, it's likely due to indoor Wi-Fi positioning inaccuracy — don't worry, admin reviews all flags

Viewing Your Time Records

- Your clock-in/clock-out history is visible on the Time Clock page

- Records show: **date, clock-in time, clock-out time, hours worked, verification status**
- Admins can view all staff time records
- Individual staff can only see their own records

Timesheet Digests

- A **payroll timesheet digest** is sent automatically to mduenas@amcharterschool.org on a scheduled basis
- This summarizes all staff clock-in/clock-out records for payroll processing
- No action needed from staff — this is automated

7 PTO REQUESTS & MANAGEMENT

How to Submit a PTO Request (Staff)

1. Go to amcharterschool.org/employee-portal/pto (or click "PTO" in the portal nav)
2. Click "**Request Time Off**"
3. Fill in the form:
 - **Start Date** — the first day you'll be out
 - **End Date** — the last day you'll be out
 - **PTO Type** — Sick, Personal, Vacation, Bereavement, or Other
 - **Reason / Details** — explain why you need the time off
4. Click "**Submit Request**"
5. Your request shows as "**Pending**"
6. You'll receive an email notification when your request is approved or denied

Tracking Your PTO Requests

- On the PTO page, you'll see a list of all your PTO requests
- Each shows: **dates, type, reason, status (pending/approved/denied), admin notes, reviewed by, reviewed date**
- You can see the admin's notes if they added any

How Admins Manage PTO Requests

1. Go to amcharterschool.org/pto/manage (requires admin login)
2. You'll see all PTO requests from all staff
3. Filter by **status** (pending, approved, denied) if needed
4. For each pending request:
 - Review the **dates, type, and reason**
 - Click "**Approve**" or "**Deny**"
 - Optionally add **Admin Notes** (e.g., "Approved — coverage arranged with Ms. Johnson")

- The staff member is automatically notified of the decision
5. Approved/denied requests show the **reviewer's name** and **review date**

8 CLASSROOM WALKTHROUGHS & TEACHER EVALUATIONS

The walkthrough system allows administrators to conduct and document classroom observations using the **FCPCS (Florida Consortium of Public Charter Schools) evaluation framework**.

How to View Existing Walkthroughs

1. Go to **amcharterschool.org/employee-portal/walkthroughs** (or click "Walkthroughs" in the portal nav)
2. You'll see:
 - **Teacher overview dashboard** — aggregated stats per teacher (number of observations, average ratings)
 - **Search bar** — search by teacher name
 - **List of all walkthroughs** — sorted by date, with teacher name, grade/subject, date, and status
3. Click any walkthrough to view its full details
4. Click a teacher's name to see all their walkthroughs in one view

How to Start a New Walkthrough

1. On the Walkthroughs page, click "**New Walkthrough**"
2. Fill in the **observation header**:
 - **Teacher** (select from dropdown — populated from the Teacher entity)
 - **Observer Name** (your name)
 - **Observation Date**
 - **Time From / Time To** (observation window)
 - **School / Campus**
 - **Grade / Subject** (auto-fills from teacher record)
3. Select which **Domains** to observe:
 - **Domain A** — Planning
 - **Domain B** — Environment
 - **Domain C** — Instruction
 - **Domain D** — Professionalism
 - You can observe one, some, or all domains
4. For each indicator within the selected domains:
 - Select a **rating** (e.g., Highly Effective, Effective, Needs Improvement, Unsatisfactory)

- Write **evidence** — specific observations that support your rating
- 5. Add **Domain Comments** for each domain you observed
- 6. Fill in the **summary section**:
 - **Target Goals for Next Observation**
 - **Next Visit Week Of** (date)
- 7. Optionally enter the **teacher's email** to have the walkthrough shared with them
- 8. Click "**Save as Draft**" or "**Share with Teacher**" or "**Complete**"

Walkthrough Statuses

Status	Meaning
Draft	In progress, not yet shared — only visible to admin
Shared with Teacher	Teacher has been notified and can view it
Completed	Finalized — no further edits needed

Sharing a Walkthrough with a Teacher

1. Open the walkthrough
2. Enter the **teacher's email address** in the email field
3. Click "**Share with Teacher**"
4. The teacher receives an email with a link to view the walkthrough
5. The walkthrough status changes to "**Shared with Teacher**"

Deleting a Walkthrough

1. Open the walkthrough
2. Click "**Delete**"
3. Confirm the deletion
4. The walkthrough is permanently removed

Note: Walkthroughs are only visible to admin-level users. Teachers cannot see their own walkthroughs unless an admin shares them via email.

Teacher Evaluations

In addition to walkthroughs, the system supports **formal teacher evaluations** with:

- Annual ratings (Highly Effective, Effective, Needs Improvement/Developing, Unsatisfactory)
- Total score calculation
- Domains observed
- Strengths, areas for improvement, and next steps
- Follow-up date scheduling

These are managed through the **TeacherEvaluation** entity and are admin-only.

VOLUNTEER HOUR MANAGEMENT & APPROVALS

The Volunteer Management portal is where staff manage parent volunteer hours, create opportunities, and approve submissions. It's accessible at amcharterschool.org/volunteer/manage (requires admin login).

Overview — Three Tabs

Tab	What It Does
Dashboard	Overview stats: total parents, approved/pending hours, milestones pie chart, top-volunteer leaderboard
Opportunities	Create, edit, and manage volunteer events that parents can sign up for
Hour Approvals	Review, approve, or reject parent hour submissions; export reports

Dashboard Tab

1. Go to amcharterschool.org/volunteer/manage
2. Click the "**Dashboard**" tab
3. You'll see:
 - **Total registered parents** — number of parents with accounts
 - **Total approved hours** — across all parents
 - **Total pending hours** — awaiting your review
 - **Milestones pie chart** — shows how many families have met the 30-hour goal vs. still working on it
 - **Top volunteer leaderboard** — parents with the most approved hours

4. Use this to identify families who may need encouragement or reminders

Opportunities Tab — Creating Volunteer Events

1. Click the "**Opportunities**" tab
2. Click "**New Opportunity**"
3. Fill in the form:
 - **Title** — e.g., "Book Fair Setup"
 - **Description** — what parents will be doing
 - **Event Date** — the date of the opportunity
 - **Start Time / End Time**
 - **Location** — where parents should report
 - **Hours Value** — how many volunteer hours parents earn for completing this (default: 1)
 - **Capacity** — max number of parent volunteers
4. Click "**Create**"
5. The opportunity is now "**Open**" and visible to parents on their volunteer portal
6. Parents can sign up directly from their portal

Managing Existing Opportunities

- Each opportunity card shows: title, date, time, location, hours value, capacity, and status (open/closed)
- Click "**Edit**" to modify any details
- Click "**Close**" to stop accepting signups (changes status to "closed")
- Click "**Reopen**" to reactivate a closed opportunity
- Click "**Delete**" to remove an opportunity permanently

Hour Approvals Tab — Reviewing Parent Submissions

1. Click the "**Hour Approvals**" tab
2. You'll see a list of all **pending** hour submissions from parents
3. Each submission shows:
 - **Parent name**
 - **Child's name**
 - **Entry type** (opportunity, receipt, or manual)
 - **Activity / Description**
 - **Event date**
 - **Hours claimed**
 - **Receipt** (if applicable — click to view the uploaded receipt photo)
 - **Receipt amount** (if applicable)

4. **Filter** submissions by:
 - **Date range** (to review a specific period)
 - **Entry type** (opportunities, receipts, or manual entries)
 - **Status** (pending, approved, rejected)
5. For each pending submission, choose an action:
 - **Approve** — the hours are added to the parent's approved total
 - **Reject** — the hours are not counted; add a **Staff Note** explaining why
6. When you approve or reject:
 - The **status** updates to "approved" or "rejected"
 - Your **name** is recorded as the approver
 - The **approval date** is logged
 - The parent sees the updated status on their dashboard in real time
 - The parent receives an automatic email notification (via the `volunteerNotify` function)

Exporting Reports (CSV)

1. On the **Hour Approvals** tab, click "**Export**"
2. A CSV file downloads with all volunteer hour data
3. The CSV includes: parent name, child name, entry type, activity, date, hours, status, approver, approval date
4. Use this for:
 - Board reports
 - Compliance documentation
 - End-of-year volunteer hour totals
 - Identifying families who haven't met the 30-hour goal

Quarterly Email Digests (Automatic)

Every quarter (**February 1, May 1, August 1, November 1**), the system automatically:

1. Calculates each parent's **total approved hours**
2. Calculates their **remaining hours** toward the 30-hour goal
3. Calculates their **progress percentage**
4. Generates a personalized email for each parent
5. Sends the email to each parent's registered email address

You don't need to do anything — this is fully automated through the `volunteerQuarterlyDigest` backend function and its scheduled workflow trigger.

Volunteer Notifications

When a parent submits new volunteer hours, the system can automatically notify staff via email (through the volunteerNotify function). This ensures you're always aware when new submissions need review.

10 RSVP & EVENT SIGNUP MONITORING

Staff can monitor all event signups (RSVPs, chaperones, volunteers) in real time.

How to View Signups

1. Go to **amcharterschool.org/rsvp-signups** (requires admin login)
2. You'll see a list of all event signups, showing:
 - **Event title**
 - **Event date**
 - **Signup type** (RSVP, Chaperone, Volunteer)
 - **Parent name**
 - **Child's name**
 - **Contact info**
 - **Number attending**
 - **Notes**
3. **Filter** by event, date, or signup type
4. **Export** to CSV for event planning

Automated RSVP Digests

Every night at **11:00 PM ET**, the system automatically:

1. Collects all **new signups** from that day
2. Compiles them into a digest email
3. Sends the digest to documents@amcharterschool.org

This ensures you never miss a new RSVP — just check your inbox each morning.

Creating School Events

1. Go to the **Interactive Calendar** page (as an admin, you'll see a "**Staff: View Sign-Ups**" option)
2. Click "**Add Event**"
3. Fill in:
 - **Title, Date, Start/End Time**
 - **Description**
 - **Location**

- **Grade Level** (All, VPK, K, 1st-5th)
 - **Flyer URL** (optional — upload a flyer image or PDF)
 - **Needs RSVP?** (toggle on/off)
 - **Is this a payment event?** (if yes, enter payment amount and payment URL)
 - **Needs Chaperones?**
 - **Needs Volunteers?**
4. Click "**Create Event**"
 5. The event appears on the public calendar and parents can sign up immediately
 6. If the event has a GHL (Go High Level) calendar ID, it syncs automatically

Event Gallery Management

1. Go to **amcharterschool.org/event-gallery/manage** (requires admin login)
2. **Review pending photo submissions** from parents
3. For each photo:
 - View the image
 - Check the caption, child name, teacher name
 - **Approve** (photo goes live in the gallery) or **Reject** (photo is removed)
4. **Manage featured photos** — select which approved photos appear in the featured section
5. **Create gallery events** — group photos by event (field trip, spirit day, etc.)

EAGLE BANK STAFF MANAGEMENT

The Eagle Bank system has several staff-facing tools for managing student accounts, transactions, and approvals.

Eagle Bank Dashboard

1. Go to **amcharterschool.org/eagle-bank/dashboard** (requires admin login)
2. View system-wide stats:
 - Total student accounts
 - Total Eagle Bucks in circulation
 - Recent transactions
 - Pending approvals

Student Approvals

1. Go to **amcharterschool.org/eagle-bank/student-approvals** (requires admin login)
2. Review **self-registered student accounts** (students who created their own account)
3. For each pending account:
 - Verify the student's name, grade, and homeroom teacher

- **Approve** — the student can now log in
 - **Reject** — add a rejection reason; the student is notified
4. Only approved students can access their Eagle Bank account

Check Deposits

1. Go to amcharterschool.org/eagle-bank/check-deposits (requires admin login)
2. Review **pending check deposits** uploaded by students
3. For each deposit:
 - View the uploaded **check photo**
 - Verify the **amount**
 - **Approve** — the deposit is credited to the student's account
 - **Reject** — add a note explaining why (e.g., "Check amount doesn't match photo")

PIN Reset Requests

1. Go to amcharterschool.org/eagle-bank/pin-resets (requires admin login)
2. View **PIN reset requests** from parents (when a student forgot their PIN)
3. For each request:
 - Contact the parent using the provided **contact info**
 - Reset the student's PIN in the system
 - Update the request status: **New → Contacted → Resolved**
 - Add a **Staff Note** documenting what was done

Parent Claim Approvals

When a parent requests to link to their child's Eagle Bank account:

1. The claim shows as **"Pending"** on the student's account
2. Review the parent's email against school records
3. **Approve** — the parent's email and user ID are linked to the student account
4. **Reject** — add a rejection reason
5. The parent is notified of the decision

POS (Point of Sale)

1. Go to amcharterschool.org/eagle-bank/pos
2. Select a **student account** (by code, name, or QR scan)
3. Enter the **purchase amount**
4. Click **"Charge"**
5. The student's balance is updated and a transaction record is created

1 2 ONBOARDING MANAGEMENT DASHBOARD

Admins can review all new hire onboarding submissions in one place.

How to Review Onboarding Submissions

1. Go to **amcharterschool.org/onboarding/manage** (requires admin login)
2. You'll see a list of all onboarding submissions, showing:
 - **Name** (first, middle, last)
 - **Position** and **Position Type**
 - **Expected Start Date**
 - **Status** (Submitted, Reviewed, Approved, Rejected)
3. Click a submission to view full details:
 - Personal info (name, DOB, gender, SSN)
 - Contact info (email, phone, address)
 - Emergency contact
 - Referral source
 - Notes
4. Review the information
5. Take action:
 - **Mark as Reviewed** — you've looked it over but haven't decided yet
 - **Approve** — the new hire is cleared to start; you'll assign them a **Staff ID Code**
 - **Reject** — add an explanation in Admin Notes
6. When you approve:
 - Enter the **Assigned Staff Code** (the new hire will use this to register their PIN)
 - The status changes to "**Approved**"
 - The new hire is contacted with their Staff Code and registration instructions
7. You can add **Admin Notes** at any stage for internal record-keeping
8. The **Reviewed By** and **Reviewed Date** fields are updated automatically

1 3 PTO MANAGEMENT DASHBOARD

(See Section 7 for the staff-facing PTO request process. This section covers the admin management dashboard.)

How to Manage All PTO Requests

1. Go to **amcharterschool.org/pto/manage** (requires admin login)
2. View all PTO requests from all staff
3. **Filter** by status (pending, approved, denied)
4. For each request:
 - Review dates, type, and reason

- **Approve or Deny**
 - Add **Admin Notes** (e.g., "Coverage arranged," "Denied - insufficient PTO balance")
5. The staff member is automatically notified via email
 6. Your name and the review date are recorded

Payroll Timesheet Digests

- Timesheet digests are sent automatically to mduenas@amcharterschool.org on a scheduled basis
- These summarize all staff time records for payroll
- The digest is automated — no manual action needed

1 4 FOCUS ACCESS REQUEST MANAGEMENT

How to Manage FOCUS Requests

1. Go to amcharterschool.org/focus-requests (requires admin login)
2. You'll see a list of all parent FOCUS access requests, showing:
 - **Parent name, email, student name, student ID**
 - **Request type** (create account, add student, login, reset password, etc.)
 - **Message** — what the parent needs
 - **Screenshot/photo** — if the parent uploaded one
 - **Status** (New, In Progress, Resolved, Closed)
3. Click a request to view full details
4. Take action:
 - Update status to **"In Progress"** when you start working on it
 - Add a **Staff Response** with instructions or follow-up
 - Update status to **"Resolved"** when the issue is fixed
 - Update status to **"Closed"** when fully complete
5. The parent can see the status update and your response in their portal

1 5 PHOTO GALLERY MANAGEMENT

How to Manage Gallery Photos

1. Go to amcharterschool.org/event-gallery/manage (requires admin login)
2. **Review pending photos** submitted by parents and staff
3. For each photo:
 - View the image
 - Check: caption, child name, teacher name, uploaded by name/role
 - **Approve** — photo appears in the public gallery
 - **Reject** — photo is removed; add a reason if needed

4. **Manage featured photos:**
 - Toggle the **"Featured"** flag on approved photos
 - Set **Featured Order** to control display sequence
 - Featured photos appear prominently in the gallery
5. **Create and manage gallery events:**
 - Create an event (e.g., "Fall Festival 2025")
 - Group related photos under that event
 - Parents select the event when uploading photos

How to Upload Staff Photos

1. In the gallery management area, click **"Upload Photo"**
2. Select the **event**
3. Choose your **file** (JPG or PNG)
4. Enter your **name** and **role** (staff)
5. Optionally enter **child name** and **teacher name**
6. Add a **caption**
7. Click **"Submit"**
8. Staff-uploaded photos can be auto-approved or reviewed (depending on settings)

NEWSLETTER MANAGEMENT

How to Upload a Newsletter

1. Go to amcharterschool.org/newsletter/manage (requires admin login)
2. Click **"Upload Newsletter"**
3. Select the **Month** (August through June)
4. Optionally enter the **School Year**
5. Enter a **Title** (e.g., "October 2025 Newsletter")
6. Upload the **full newsletter file** (PDF or image) — this is shown at the top of the monthly box
7. Optionally upload a **thumbnail image** — shown as a small preview in the monthly box
8. Enter your **name** and **email** (as the uploader)
9. Click **"Submit"**

Newsletter Review Process

- Uploaded newsletters start as **"Pending"**
- An admin reviews and **approves** or **rejects** each submission
- Approved newsletters appear on the public website
- If rejected, a **rejection reason** is recorded

1 7 TESTIMONIALS & REFERRALS MANAGEMENT

Testimonials Management

1. Go to **amcharterschool.org/testimonials/manage** (requires admin login)
2. Review **pending parent testimonials**:
 - Parent name, relationship, rating (1-5 stars), content, optional video URL
3. For each testimonial:
 - **Approve** — it appears on the public testimonials page
 - **Reject** — add a reason
4. Approved testimonials are displayed on the website

Referrals Management

1. Go to **amcharterschool.org/referrals/manage** (requires admin login)
2. Review **pending referrals** from parents:
 - Referring parent name, email, address, phone
 - Referred family name, phone, email, notes
3. Update the referral status through the pipeline:
 - **Submitted** → **Contacted** → **Registered** → **Attended** → **Credit Awarded**
 - Or mark as **Ineligible**
4. When a referred family enrolls, mark "**Credit Awarded**" and toggle "**Credit Awarded**" to true
5. The referring parent receives their referral credit

1 8 CURRICULUM CENTER

The Curriculum Center is a hub for educational programs, teacher resources, and training materials.

How to Access

1. Go to **amcharterschool.org/employee-portal/curriculum** (or click "Curriculum" from the staff dashboard)
2. You'll see a **grid of curriculum programs**
3. Each program card shows:
 - Program name
 - Description
 - Available resources (lesson plans, guides, etc.)
 - Resource availability status
4. Click a program to view its resources
5. Download or view resources as needed

Upcoming Features

- **Interactive Classroom Setup Guide** — a planned feature to help teachers set up their classrooms
- Additional curriculum resources will be added over time

RESOURCE CENTER

The Resource Center is a searchable library of staff documents, policies, and forms.

How to Use

1. Go to **amcharterschool.org/employee-portal/resources** (or click "Resources" in the portal nav)
2. **Search** by keyword in the search bar
3. **Filter by category** using the sidebar:
 - HR documents
 - Policies
 - Forms
 - Handbooks
 - Training materials
 - And more
4. The resource grid updates as you search or filter
5. Click any resource to view or download it
6. If you can't find what you need, there's a **support link** to request help

MONTY AI — YOUR STAFF ASSISTANT

Monty the Eagle is an AI-powered assistant designed specifically for Atlantic Montessori Charter School staff. He can answer questions about school operations, portal resources, staff procedures, and onboarding.

How to Use Monty

1. Go to **amcharterschool.org/employee-portal/monty** (or click "Monty" from the staff dashboard)
2. You'll see a chat interface with Monty's mascot
3. Type your question in the chat box
4. Monty responds with guidance based on his knowledge of:
 - School operations and procedures
 - Employee portal resources and navigation
 - Onboarding phases and requirements
 - Staff policies and workflows

5. You can ask follow-up questions — Monty remembers the conversation
6. **Suggested prompts** are available as clickable buttons to get you started

What Monty Can Help With

- "How do I clock in?"
- "What are the onboarding steps for a new hire?"
- "Where do I find the staff handbook?"
- "How do I submit a PTO request?"
- "What domains are in the walkthrough evaluation?"
- "How do I approve volunteer hours?"

Note: Monty is a guide, not a replacement for HR. For sensitive matters (payroll, benefits, HR disputes), contact administration directly.

2 1 EMAIL NOTIFICATIONS & AUTOMATED DIGESTS

The system sends several automated email notifications. Here's what to expect:

Automated Emails (No Action Needed)

Notification	Sent To	Frequency	What It Contains
RSVP Sign-Up Digest	documents@amcharterschool.org	Nightly at 11:00 PM ET	All new event signups from that day
Payroll Timesheet Digest	mduenas@amcharterschool.org	Scheduled	All staff clock-in/clock-out records
Volunteer Quarterly Digest	Each parent's email	Feb 1, May 1, Aug 1, Nov 1	Parent's approved hours, remaining hours, progress

Notification	Sent To	Frequency	What It Contains
Volunteer Hour Notifications	Staff (for review)	When a parent submits hours	Alert that new hours need review
PTO Decision Notifications	Staff member	When admin approves/denies	PTO request status and admin notes
Walkthrough Shared	Teacher's email	When admin shares	Link to view the walkthrough
Staff Registration Confirmation	Staff member's email	After registration	Confirmation that account was created
New Onboarding Submission	Admin/HR	When a new hire submits	Alert that onboarding form was submitted
Newsletter Upload Confirmation	Uploader's email	After upload	Confirmation and review status

Email System Notes

- All automated emails are sent through our integrated email system
- The nightly RSVP digest goes to documents@amcharterschool.org
- All payroll and timesheet notifications go to mduenas@amcharterschool.org
- Emails to registered app users are sent through the built-in email integration
- For external email needs, we use the connected Gmail integration ("Client Gmail Inbox")

2 2 WHERE TO GET HELP

Issue	Solution
Can't log in to Employee Portal	Contact admin to verify your Staff Code; use PIN reset if needed

Issue	Solution
Forgot your PIN	Email mduenas@amcharterschool.org to have it reset
Can't clock in	Ensure location services are on; clock in anyway (soft geo-check); contact admin if issues persist
Time clock showing "unverified"	This is a soft flag — admin reviews; don't worry if you were on campus
Walkthrough questions	Contact your supervisor or admin
Volunteer management questions	Check the help guide on the staff login page, or email documents@amcharterschool.org
Eagle Bank issues	Contact the Eagle Bank admin
Onboarding questions (new hires)	Contact HR at mduenas@amcharterschool.org
Curriculum questions	Visit the Curriculum Center or contact your department lead
Resource/document requests	Visit the Resource Center or use the support link
Website issues	Go to amcharterschool.org/contact and select "Website Suggestion"
Monty AI not helping	Contact admin for the specific issue; Monty is a guide, not a replacement

Important Email Addresses

- Payroll, timesheets, PTO, attendance: mduenas@amcharterschool.org
- Documents, RSVP digests, general inquiries: documents@amcharterschool.org
- HR / Onboarding: mduenas@amcharterschool.org

Built-In Help Guides

- **Staff Login Page** (amcharterschool.org/employee-portal/login): Click "**How to Manage Volunteer Hours**" to expand a 7-step walkthrough
- **Staff Registration Page** (amcharterschool.org/employee-portal/register): Same help guide is available here
- **Monty AI**: Available 24/7 at amcharterschool.org/employee-portal/monty for instant answers

We are so excited for you to explore everything the new website and Employee Portal has to offer. This platform was built with you — our Eagle staff — in mind, to make daily operations, communication, and administration easier than ever.

If you have any questions about anything in this guide, please don't hesitate to reach out to administration. We're here to help!

Thank you for everything you do for our Eagles every day.

Warmly,

Atlantic Montessori Charter School Administration *A New Dawn of Learning* amcharterschool.org