



eConfirm Overview

What is eConfirm?

eConfirm is a secure web form service from Directory Solutions, Inc. that provides the ability to collect family contact information online. By enlisting the families help in updating their information, eConfirm speeds up the directory publishing process as well as improves the accuracy of the data collected. Families, both returning and new, simply enter their information via an online secure web form. The directory administrator then retrieves the information, updating the directory database.

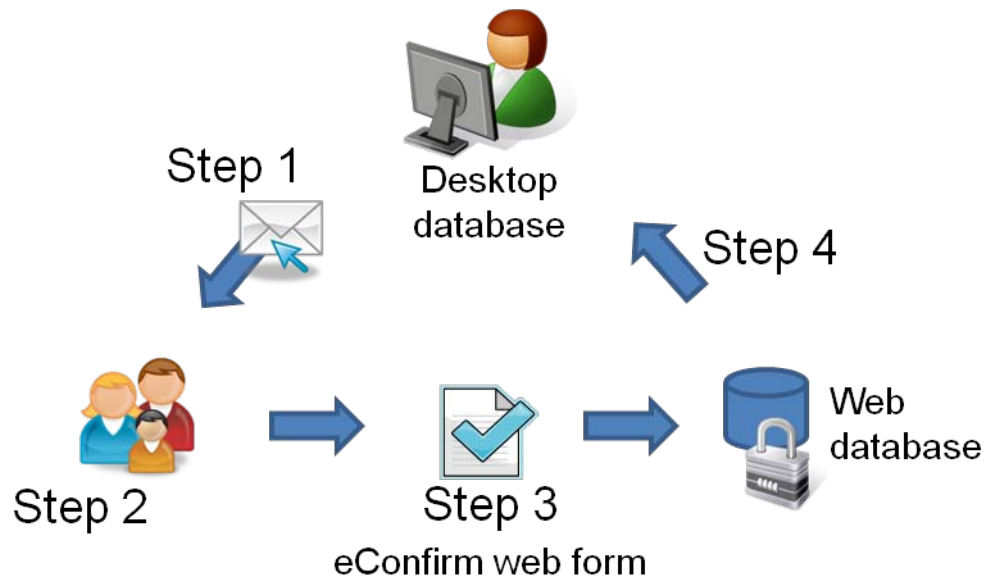
With eConfirm and the MyDirectoryMaker MySchool software, you truly can have your directory out within the first week or two of the new school year.

How does it work?

The eConfirm process is a series of steps combining email, online web forms and data import. Important to the process is the designation of families and their type. This is important as we treat them differently when we are updating the directory for the new school year. We categorize families as one of the following types:

- **Returning Families with changes** – These are families with children returning from the prior school year. They need to update their existing information because of the addition of a new student, changes in address or phone, etc.
- **Returning with no changes** – These are families returning to the school whose information is the same as last year. Depending upon your school policy, they may need to opt in to the directory for the new school year.
- **New Families** – These are families that are new to the school or families that have never been in the directory database before and wish to be included.

The following is a step by step overview of the eConfirm process. The timing of the process is up to your school. Some schools want to get a head start before the school year is out. Others want to start with the beginning of school. Either way, the process should take no more than one to 2 weeks.



- **Step 1** – The directory administrator emails the data confirmation letters to returning families. This letter is an attached PDF to the confirmation email. The data confirmation letter contains the contact information for the family. Families that are in the database but do not have an email address will / should get a printed copy of their letter.

The email and / or letter should reference web links for families to use to update their information in Step 3.

- **Step 2** – The family reviews their information for accuracy.
- **Step 3** – The family goes to the online web form and updates their information, if required. For schools that are “opt in” (meaning they must acknowledge each year they wish to be in the directory), families will use the web form to confirm that they wish to be printed and confirm that their data is accurate.

New Families: Since new families aren’t in the database, we can’t email them a link to enter their data. Your web administrator will need to add a link to the new family web form on your school or parent association website. You will also need to notify new families that the form is available. This can be done in a welcome letter sent to all families before the beginning of the school year.

- **Step 4** – The directory administrator logs on to the secure eConfirm website and downloads the submissions and imports them into MyDirectoryMaker MySchool software, on the desktop local computer.

Depending upon how much time you have allowed for updates, the download can be done at one time or scheduled weekly / daily. Because eConfirm is a simple online process, it is recommended that you don't give families too much time to update their information. Usually one to two weeks is sufficient. Any more time and emails get forgotten and forms get lost.

When the directory has been updated – the data on the server is purged by request from the directory administrator. The data should not remain on the server after the directory has been published as the intention of the eConfirm server is to temporarily store the submissions.

How do I use it with my email and website?

When you register for eConfirm you will be given three links to the web forms:

1. New Family Form link: this link will take you to the new family form.
2. Returning Family with updates link: this link will take you to a form for returning families that need to change their information.
3. Returning Family print updates only link: this link will take you to a form for updating print options only. This will typically be used by schools that require data confirmation each school year.

These links can be emailed or put on your school's or parent association's website with specific instructions to families on how to use them.

How secure is our data?

All data is submitted using SSL (Secure Socket Layers). This means that the data is encrypted during the submission process and data cannot be "high jacked" during submission. Users can verify this security certificate upon data entry. The familiar "lock" will appear in the URL address when the user goes to the form. In addition, when parents enter their information, they are simply sending the data into the secure database. They have no access to read or change the information once it has been submitted. This eliminates the need to manage hundreds of passwords and potential harmful access to the data.

The data is stored on a secure server behind a firewall. Only the administrator with a password has access to the data, and their access is limited to downloading and deleting the information. Once the directory is updated, the administrator will request that the data be purged from the eConfirm server. In this way, data doesn't stay on the server for more than a couple of weeks.