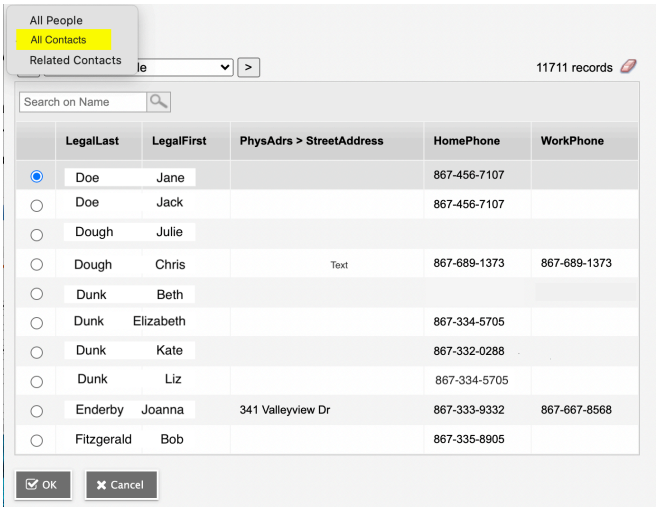
Contacts

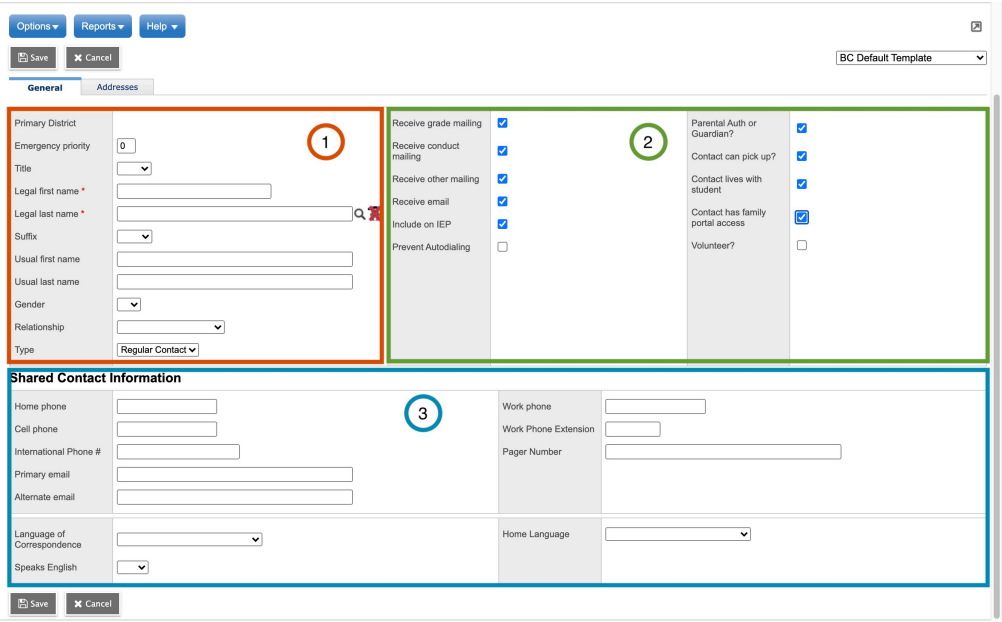
Adding Existing or Creating New

School view > Student top tab > Contacts side tab

Each contact is an individual record and belongs solely to that contact. A contact must **never** be overwritten. By overwriting/replacing a contact, you change the record for any and all students that they are connected to.



Prior to inserting a new contact record, a search must be performed. Type in the first and last name of the contact (red square #1) and click the magnifying glass. A pop up window will be produced. From the drop down field select *All Contacts.* DO NOT use *All People or Related* Contacts. Note that in the sample to the right, there are actually three contacts who could be the same person. Beth Dunk, Elizabeth Dunk, and Liz Dunk. Names submitted by friends and family of the contact are not always the legal name. Always look for variations of the name along with incorrect spellings. This also applies to last names along with other known as names, ie hyphenated last names. A selection can be made and pulled into the contacts to be verified. If no details match, delete the contact and do another search. If a correct contact is found and selected, continue filling in additional information. If no existing contact is found, create a new one.



1. Complete search and select existing contact or create new one. Fill in "*Relationship*" and "*Type*". Both of these fields are only applicable to the individual student file being worked on.
2. For parent/guardian contacts, all the blue check marks should be marked. School Messenger uploads are based on the "*Parental Auth or Guardian*?" identification check box. For

"Emergency Contacts" the *"Contact can pick up?" box is ideally selected. All of box 2 are also only applicable to the individual student file being worked on.*

3. *The "Shared Contact Information"* is the information that is shared by all students to whom the contact is attached to. Be very careful when updating and insure that this information is accurate and up to date. When the *"Home phone"* does not have a land line to insert, copy the cell phone to this field as well. The pop up contact box does not display a cell phone field, so filling in an empty home phone with a cell number is beneficial for future searches.