

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 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. In the sample to the right, there are 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, i.e., 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.

	LegalLast	LegalFirst	PhysAdrs > StreetAddress	HomePhone	WorkPhone
<input checked="" type="radio"/>	Doe	Jane		867-456-7107	
<input type="radio"/>	Doe	Jack		867-456-7107	
<input type="radio"/>	Dough	Julie			
<input type="radio"/>	Dough	Chris	Text	867-689-1373	867-689-1373
<input type="radio"/>	Dunk	Beth			
<input type="radio"/>	Dunk	Elizabeth		867-334-5705	
<input type="radio"/>	Dunk	Kate		867-332-0288	
<input type="radio"/>	Dunk	Liz		867-334-5705	
<input type="radio"/>	Enderby	Joanna	341 Valleyview Dr	867-333-9332	867-667-8568
<input type="radio"/>	Fitzgerald	Bob		867-335-8905	

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 selected. Schools who have not enabled portal access can leave the Contact has family portal access box empty. 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 this individual student file.

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. 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.