



## Contacts

### Standards for Student Contacts – Contact Cleanup

1. Global TopTab > Favorite SideTab > Student Contact
2. Field Set = Contacts Cleanup

#### Mass Updating an Emergency Priority Number

Example: We want all contacts labeled “Mother” to have an Emergency Priority number = 1

Field	Emergency priority
Value	1

- A. Filter = “Relationship = ?”
- B. Be **very** careful that you did Step #A...**Options > Mass Update > Emergency Priority + a number**

#### Mass Deleting Doctors and Dentists

Example: We want to remove contacts labeled “Doctor” or “Dentist”

- A. Filter = “Doctor/Dentist”
- B. Be **very** careful that you did Step #A...Select all the items on the page (35 items will be selected).
- C. **Options > Delete** (this should only affect the 35 records that you selected)
- D. Repeat for all the pages of Doctor/Dentist contact records.

#### Updating Parent Portal Access

Example: We want to allow all Contacts that are listed as Parent/Guardian to access the Family Portal.

- A. Filter = “Parent Portal Prep”
- B. **Options > Modify List > Click on the Pencil icon below the PortalAccess heading**
- C. Values are N (No) or Y (Yes). Click the green checkbox at the top to save your work. Do not change pages without saving your work.