

Family Groups & Contacts Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
7/22/21	Task #1	Added information regarding the Uses Family Groups option and updated screenshot
6/14/21	Task #1	Added information regarding SPM - Special Program Management and updated screenshot
4/14/20	Entire document	Review and update
9/26/19	Entire document	Update document
10/17/18	Entire document	Update document

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When setting up Family Groups for the first time, in order for the Family Groups Wizard to recognize new students, the default school year must be the year the new students will start in. For example, if you are registering new KG students with an admission date of 8/1/21, then you would need for the default school year to be 2021-2022 when running the Family Groups Wizard.

Task #1 – Select Uses Family Groups, Family Courier option & Family Group editing options

1. With the district in context, navigate to : **StudentInformation** » **Management** » **District Administration** » **District Options**.
2. In the **Family Groups** section, select the **Uses Family Groups** option.
3. In the **Select a Method to assign a Family Courier** section, select a courier assignment method.
4. Next, as an option, in the **Select grade levels that will be excluded from being a family group courier** section, if you want to exclude students in certain grade levels (for example, preschool) from being selected as the courier for family groups, in the Grade multiselect list, select the grade(s) to exclude by moving them from the left side to the right side.
5. Next, in the **Select a method to edit Family Group Contacts** section, choose an edit method.
 - a. If **Allow edits per school** is selected, the student in a family group can only be edited when the building they are actively enrolled in is in context or if the district is in context.
 - b. If **Allow edits per district** is selected, a student in a family group can be edited regardless of what building is in context or if the district is in context.
6. The remaining sections on this screen are for other functions in the application. In the **Report Cards** section, check the **Disable Cards on ParentAccess Portal for Students with Unpaid Fees** option if you want to disable report cards on the ParentAccess Portal for students with unpaid fees. In the **Graduation Points Service** section, check the **Recalculate Student Graduation Points daily** option if you want the scheduled job to run daily that will refresh the Grad Points Summary data. In the **Unattended Email Address** section, enter a no-reply **Email Address** for the district for notification emails. In the **Special Education Program** section, select the appropriate Special Education Program. If you select **SPM**, you are prompted to enter the integration key for your district.
7. Click **Save**.

District Options

From this screen, you can display and change District Options.

Family Groups

Uses Family Groups

Select a method to assign a Family Courier

No Family Courier assignment
 Assign Family Courier to youngest family member
 Assign Family Courier to oldest family member

Select grade levels that will be excluded from being a family group courier

Grade

AG - AG	↔	
IN - Infant/Toddler (Ages 0-2)	↔	
PS - PS	↔	
K - K	↔	

Select a method to edit Family Group Contacts

Allow edits per school
 Allow edits per district

Report Cards

Disable Report Cards on ParentAccess Portal for Students with Unpaid Fees

Graduation Points Service

Recalculate Student Graduation Points daily

Unattended Email Address

Email Address:

Special Education Program

SpS Refresh ▼

Task #2 – Create multiple Family Groups at one time using the Family Groups Wizard

1. Change the context to the building or district level of the current year. (Family Group creation can be done at either level)
2. Navigate to : **StudentInformation** » **Management** » **District Administration** » **Family Groups Wizard**.
3. On the **General** tab, select **Build groups with single and multiple students**.
4. Match criteria checkboxes appear. Select the fields you would like to match on. Keep in mind, the more fields you check – the less matches you will have. Click **Next**.
5. Review your selections on the **Selection Summary** tab.
6. Click **Next** to advance to the final tab.
7. On the **Display Groups** tab, Family Groups were tentatively created based on your selections.
8. Ten Family Groups will display at a time, but this can be adjusted using the **Number of Family Groups Per Page** option. Place a check next to any group you wish to keep. Students assigned to the group will display in the right-hand column.

Family Groups Wizard

From this screen, you can run a Wizard to assist in the creation of Family Groups for your district.

General
Selection Summary
Display Groups

Save

Search By: Family Group Name ▼

Search

Student is courier for family group

This student is enrolled in a future school year

Number of Family Groups Per Page: 10 ▼

◀ First
Previous
1
|
2
|
3
|
4
Next
▶ Last
38 FamilyGroups Found

		Family Group	Description	Student Address	Students In Group
<input checked="" type="checkbox"/>		AGUILAR	AGUILAR Family Group	3487 AGUILAR Road	<input checked="" type="checkbox"/> AGUILAR LUIS
<input type="checkbox"/>		ALLEN	ALLEN Family Group	8291 ALLEN Road	<input checked="" type="checkbox"/> ALLEN LEROY
<input type="checkbox"/>		AVERY	AVERY Family Group	3495 AVERY Road	<input checked="" type="checkbox"/> AVERY MARSHA
<input type="checkbox"/>		AYERS	AYERS Family Group	7310 AYERS Road	<input checked="" type="checkbox"/> AYERS DUSTIN
<input type="checkbox"/>		BISHOP	BISHOP Family Group	4678 BISHOP Road	<input checked="" type="checkbox"/> BISHOP FERNANDO
<input type="checkbox"/>		BLACKWELL	BLACKWELL Family Group	1598 BLACKWELL Road	<input checked="" type="checkbox"/> BLACKWELL ANNETTE <input checked="" type="checkbox"/> BLACKWELL MATHEW
<input type="checkbox"/>		CARR	CARR Family Group	7075 CARR Road	<input checked="" type="checkbox"/> CARR JOSE
<input type="checkbox"/>		CHANG	CHANG Family Group	7166 CHANG Road	<input checked="" type="checkbox"/> CHANG TONYA
<input type="checkbox"/>		COX	COX Family Group	9256 COX Road	<input checked="" type="checkbox"/> COX ALFREDO
<input type="checkbox"/>		CURRY	CURRY Family Group	1319 CURRY Road	<input checked="" type="checkbox"/> CURRY ERIN

< Back
Save

9. Click **Save**.

10. If two Family Groups need to be combined, click the edit pencil next to one of the groups. In the example below – two Allen Family Groups were created. The students in each Allen Family Group need combined.

		ALLEN	ALLEN Family Group	8291 ALLEN Road	ALLEN, MARCUS ALLEN, MARIO	
		ALLEN	ALLEN Family Group	8291 ALLEN Road	ALLEN, ANNE	

11. Go to **StudentInformation** » **Management** » **District Administration** » **Family Groups**. Now add Anne Allen to the Family Group that already contains Marcus and Mario Allen by clicking the edit pencil for the 1st Allen Family Group.

12. Once the 2nd tab named **Students** of the Allen Family Group displays, type “allen” into the **Student Name** search field. This will search the entire district for any student whose name contains allen.

13. Click **Search**.

14. Students matching the search criteria will be show at the bottom in a grid.

15. Place a check in the box next to the students you want to add to the Family Group and then click **Add Selected Students**.

Family Groups

From this screen you can display or change information regarding family groups

< Prev Group: ALLEN
Next Group: ALLEN >

Group
Students
Contacts

	Is Courier	Student	Grade	School	Student Number	Phone Number	Address	Gender	Active
		ALLEN, MARCUS	06	Elida Middle School	24004	(419) 555-3327	8291 ALLEN Road	M	
		ALLEN, MARIO	12	ELIDA HIGH SCHOOL	18370	(419) 555-3327	8291 ALLEN Road	M	

Family Group Name: ALLEN

Show Active Only 🕒 This student is enrolled in a future school year

Student Name: Phone Number:

Street Address: Search

Back

Add Selected Students

	FirstName ▲	LastName	MiddleName	Grade	Student Number	Phone Number	Address	BirthDate	Gender	Is Active	Family Groups
<input checked="" type="checkbox"/>	ANNE	ALLEN		09	21088	(419) 555-3821	8291 ALLEN Road	03/27/2003	F		ALLEN
<input type="checkbox"/>	CLIFFORD	ALLEN		12	18396	(419) 555-7401	8291 ALLEN Road	12/17/1998	M		ALLEN
<input type="checkbox"/>	FRANCISCO	ALLEN		07	23307	(419) 555-9394	8291 ALLEN Road	02/18/2005	M		ALLEN

Family Groups

From this screen you can display or change information regarding family groups

< Prev Group: ALLEN Next Group: ALLEN >

Group Students Contacts

	Is Courier	Student	Grade	School	Student Number	Phone Number	Address	Gender	Active
		ALLEN, ANNE	09	ELIDA HIGH SCHOOL	21088	(419) 555-3821	8291 ALLEN Road	F	
		ALLEN, MARCUS	06	Elida Middle School	24004	(419) 555-3327	8291 ALLEN Road	M	
		ALLEN, MARIO	12	ELIDA HIGH SCHOOL	18370	(419) 555-3327	8291 ALLEN Road	M	

Family Group Name: ALLEN

Show Active Only This student is enrolled in a future school year

Student Name: Phone Number:

Street Address:

16. Continue the process until you have all students in the Family Group.

Task #3 – Create a single Family Group

1. Navigate to **StudentInformation** » **Management** » **District Administration** » **Family Groups**.
2. Click **Add Family Group**.
3. Enter a Name and an optional Description.

Family Groups
From this screen you can display or change information regarding family groups

Group | **Students** | Contacts

Name: *

Description:

4. Click the 2nd tab named **Students**.
5. Use any of the three filters to search for students to add to the Family Group and click **Search**.
6. Students matching the search criteria will show at the bottom in a grid.
7. Place a check in the box next to the students you want to add to the Family Group and then click **Add Selected Students**.

Family Groups
From this screen you can display or change information regarding family groups

Group | **Students** | Contacts

Family Group: White

Is Courier Student Grade School Student Number Phone Number Address Gender Active

There are no records to display

Show Active Only [This student is enrolled in a future school year](#)

Student Name: Phone Number:

Street Address:

<input type="checkbox"/>	FirstName	LastName	MiddleName	Grade	Student Number	Phone Number	Address	BirthDate	Gender	Is Active	Family Groups
<input checked="" type="checkbox"/>	DARRYL	WHITE		10	20007	(419) 555-8481	9651 WHITE Road	01/22/2002	M		
<input type="checkbox"/>	IDA	WHITE		KG	30097	(419) 555-5284	9651 WHITE Road	01/16/2012	F		WHITE

Family Groups
From this screen you can display or change information regarding family groups

Group | **Students** | Contacts

Family Group: White

Is Courier Student Grade School Student Number Phone Number Address Gender Active

Show Active Only [This student is enrolled in a future school year](#)

Student Name: Phone Number:

Street Address:

<input type="checkbox"/>	Is Courier	Student	Grade	School	Student Number	Phone Number	Address	Gender	Active
<input checked="" type="checkbox"/>		WHITE, DARRYL	10	ELIDA-HIGH SCHOOL	20007	(419) 555-8481	9651 WHITE Road	M	

8. The green envelope icon next to the student signifies that the student is the Courier for the family group.

Task #4 – How to view which Family Group a student is a member of

1. Put a student in context at either the district or building level.
2. Click on their name in the context area or navigate to **StudentInformation** » **SIS** » **Student** » **View Profile**.
3. If the student is in a Family Group, it will show at the bottom of the page.

DAY, KEVIN

From this screen, you can view the student's profile.

Address of Residence: 2262 DAY Road
GALION, OH 44833

Mailing Address: 2262 DAY Road
GALION, OH 44833

Phone Number: (419) 555-6195 Unlisted

Student Email: student@donotuse.com

Primary Contact's Email: test@donotuse.com

Parent/Guardian: DAY, MARIAN
H: (419) 555-2399
W: (419) 555-0111
M: (419) 555-6195

Parent/Guardian: DAY, JULIO
H: (419) 555-6176
W: (419) 555-5580
M: (419) 555-6176

Student Status: ACTIVE RES

Birthdate: 9/22/2002

Ethnicity: CAUCASIAN

Program:

Graduation Year: 2021

Academic Locker: 633

Admission History: 8/26/2008 - Enrolled

EMIS Situation: 9 - Resident attending but takes JVS satellite courses
P/T

Percent of Time: 87%

Report to EMIS:

Effective Date: 1/6/2020

Parking Permit Number: ABC123

Parking Space: 1234

Student is courier for family group

Student is enrolled in a future school year

I want to... ▼

**NO
PHOTO
AVAILABLE**

Family Group	Description	Student Address	Students In Group
DAY	DAY Family Group	2262 DAY Road	<input checked="" type="checkbox"/> DAY, KEVIN Galion High School

4. You can also use the I want to menu to View A Student's Family Group. If you do not have access to the Family Groups page, you will not have the I want to option in the dropdown.

DAY, KEVIN

From this screen, you can view the student's profile.

Address of Residence: 2262 DAY Road
GALION, OH 44833

Mailing Address: 2262 DAY Road
GALION, OH 44833

Phone Number: (419) 555-6195 Unlisted

Student Email: student@donotuse.com

Primary Contact's Email: lest@donotuse.com

Parent/Guardian: DAY, MARIAN
H: (419) 555-2399
W: (419) 555-0111
M: (419) 555-6195

Parent/Guardian: DAY, JULIO
H: (419) 555-6176
W: (419) 555-5580
M: (419) 555-6176

I want to...

- Edit This Student's Profile
- View/Edit Full Schedule
- View/Apply Fees
- View The Medical Health Log
- View This Student's Memberships
- View Today's Schedule
- View Contacts
- View Lockers
- View A Student's Family Group**
- View A Student's Discipline Incidents
- View Latest Report Card
- View Student Absence Intervention
- View Student Roadmap

Student Status: ACTIVE RES

Birthdate: 9/22/2002

Ethnicity: CAUCASIAN

Program:

Graduation Year: 2021

Academic Locker: 633

Admission History: 8/26/2008 - Enrolled

5. The link will take you to the following page: **[Student Information](#)**
» **[Management](#)** » **[District Administration](#)** » **[Family Groups](#)**.

Family Groups

From this screen you can display or change information regarding family groups

Group | Students | **Contacts**

	Is Courier	Student	Grade	School	Student Number	Phone Number	Address	Gender	Active
	<input checked="" type="checkbox"/>	DAY, KEVIN	11	Galion High School	2271744	(419) 555-6195	2262 DAY Road	M	●

Family Group Name: DAY

Show Active Only ⓘ This student is enrolled in a future school year

Student Name: Phone Number:

Street Address:

Task #5 – Review existing District Family Groups

1. Navigate to [StudentInformation](#) » [Management](#) » [District Administration](#) » [Family Groups](#).
2. Enter text in the **Family Group Name** field to filter down results or leave the field blank to return all Family Groups in the district.
3. To delete a Family Group, click the trash can icon next to the group.

Family Groups

From this screen you can display or change information regarding family groups

Search By: Family Group Name ▾

×
Search

Add Family Group

Student is courier for family group

This student is enrolled in a future school year

Number of Family Groups Per Page: 10 ▾

4 FamilyGroups Found

		Family Group ▲	Description	Student Address	Students In Group	Active
		ALLEN	ALLEN Family Group	9738 MIRANDA Road	ALLEN, CLIFFORD BRIGHT, ROBERTO <input checked="" type="checkbox"/> MIRANDA, PATRICIA MORSE, ARLENE MORSE, PERRY	●
		ALLEN	ALLEN Family Group	8291 ALLEN Road	ALLEN, ANNE ALLEN, LEROY <input checked="" type="checkbox"/> ALLEN, MARCUS ALLEN, MARIO Allen, Sam	●
		ALLEN	ALLEN Family Group	8291 ALLEN Road	ALLEN, FRANCISCO <input checked="" type="checkbox"/> ALLEN, MICHEAL	●
		ALLEN	ALLEN Family Group	8291 ALLEN Road	<input checked="" type="checkbox"/> ALLEN, THEODORE	●

Show Active Only

4. To edit a Family Group, click on the edit pencil icon next to the group. The **Students** tab will display.
5. To add students to the existing Family Group, use the filters to search for students.
 - a. Any student that matches the search criteria will display, even if they are already assigned to another Family Group.
 - b. A student can be a member of more than one Family Group.
 - c. Place a check in the box next to the student(s) you want to add to the Family Group and then click **Add Selected Students**.

Family Groups

From this screen you can display or change information regarding family groups

< Prev Group: ALLEN Next Group: Allen >

Group Students Contacts

Is Courier	Student	Grade	School	Student Number	Phone Number	Address	Gender	Active
		ALLEN, ANNE	09	ELIDA HIGH SCHOOL	21088	(419) 555-3821 8291 ALLEN Road	F	
		ALLEN, MARCUS	06	Elida Middle School	24004	(419) 555-3327 8291 ALLEN Road	M	
		ALLEN, MARIO	12	ELIDA HIGH SCHOOL	18370	(419) 555-3327 8291 ALLEN Road	M	

Family Group Name: ALLEN

Show Active Only This student is enrolled in a future school year

Student Name: allen Phone Number:

Street Address: Search

Back

Add Selected Students

FirstName	LastName	MiddleName	Grade	Student Number	Phone Number	Address	BirthDate	Gender	Is Active	Family Groups
<input type="checkbox"/>	CLIFFORD	ALLEN	12	18396	(419) 555-7401	8291 ALLEN Road	12/17/1998	M		ALLEN
<input type="checkbox"/>	FRANCISCO	ALLEN	07	23307	(419) 555-9394	8291 ALLEN Road	02/18/2005	M		ALLEN
<input type="checkbox"/>	LEROY	ALLEN	12	16217	(419) 555-3821	8291 ALLEN Road	04/12/1998	M		ALLEN
<input type="checkbox"/>	MICHEAL	ALLEN	03	26237	(419) 555-9394	8291 ALLEN Road	11/28/2007	M		ALLEN
<input checked="" type="checkbox"/>	Sam	Allen	11	200801643		PO box 100	01/01/2000	M		Allen
<input type="checkbox"/>	THEODORE	ALLEN	10	20430	(419) 555-3462	8291 ALLEN Road	05/27/2002	M		ALLEN

Family Groups

From this screen you can display or change information regarding family groups

< Prev Group: ALLEN Next Group: Allen >

Group Students Contacts

Is Courier	Student	Grade	School	Student Number	Phone Number	Address	Gender	Active
		ALLEN, ANNE	09	ELIDA HIGH SCHOOL	21088	(419) 555-3821 8291 ALLEN Road	F	
		ALLEN, MARCUS	06	Elida Middle School	24004	(419) 555-3327 8291 ALLEN Road	M	
		ALLEN, MARIO	12	ELIDA HIGH SCHOOL	18370	(419) 555-3327 8291 ALLEN Road	M	
		Allen, Sam	11	ELIDA HIGH SCHOOL	200801643	PO box 100	M	

Family Group Name: ALLEN

Show Active Only This student is enrolled in a future school year

Student Name: allen Phone Number:

Street Address: Search

Back

d. To remove a student, click the trash can icon next to their name. The student is hard deleted from the group once you click the icon.

Family Groups

From this screen you can display or change information regarding family groups

< Prev Group: ALLEN Next Group: Allen >

Group Students Contacts

Is Courier	Student	Grade	School	Student Number	Phone Number	Address	Gender	Active
		ALLEN, MARCUS	06	Elida Middle School	24004	(419) 555-3327 8291 ALLEN Road	M	
		ALLEN, ANNE	09	ELIDA HIGH SCHOOL	21088	(419) 555-3821 8291 ALLEN Road	F	
		ALLEN, MARIO	12	ELIDA HIGH SCHOOL	18370	(419) 555-3327 8291 ALLEN Road	M	

Family Group Name: ALLEN

Show Active Only This student is enrolled in a future school year

Student Name: allen Phone Number:

Street Address: Search

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Task #6 – Consolidate Family Group Contacts

1. To consolidate contacts for the Family Group members, choose the **Contacts** tab.
 - a. All members of the Family Group will display across the top.
 - b. If you are at the District level or the student resides in the building in context, the student's name will appear as a blue link that you can click to take you to the student's Contact Summary page (**StudentInformation** » **SIS** » **Student** » **Contacts Summary**).

Family Groups

From this screen you can display or change information regarding family groups

Group
Students
Contacts

Students' contacts can only be modified if the student is in the building in context.

+ ALLEN Family Group

Search Professional Contacts

Add To Group

[Collapse All]	ANNE ALLEN	MARCUS ALLEN	MARIO ALLEN	Sam Allen
	Grade: 09 ELHS	Grade: 06 ELMS	Grade: 12 ELHS	Grade: 11 ELHS

FATHER ▼

HUGH DAWSON	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
-------------	--------------------------	-------------------------------------	--------------------------	--------------------------

MOTHER ▼

NORA ALLEN	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ALVIN ALLEN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GUY MENDEZ	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PARENT(S) ▼

Margey Allen	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MARGIE ALLEN	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TERRY ALLEN	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marge Allen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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- c. Hover the mouse over a contact to see more details.

PARENT(S) ▼

Margey Allen	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Po Box 100 Ottawa OH 45875	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TERRY ALLEN	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marge Allen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- d. To link a contact to a student, check the box in the corresponding column and row.
- e. If you uncheck all the boxes for a contact in the row, the contact will be hard deleted once you leave the page. There is no save button on the page. Edits are saved automatically on the page.
- f. A student can have one primary contact, which is denoted by the gold star. To make a contact the primary contact, click the star in the corresponding row for that student.
- g. Example: student Sam Allen, we unchecked the Parent(s) contact Marge Allen and checked the Parent(s) contact Margie Allen. Once we leave the page the edit automatically saves. Since Parent(s) contact Marge Allen no longer has any columns checked, this contact will be deleted when we leave the page.

Family Groups
 From this screen you can display or change information regarding family groups

Group | **Students** | Contacts

Students' contacts can only be modified if the student is in the building in context.

ALLEN Family Group Search Professional Contacts

[Collapse All] [ANNE ALLEN](#) [MARCUS ALLEN](#) [MARIO ALLEN](#) [Sam Allen](#)

	Grade: 09 ELHS	Grade: 06 ELMS	Grade: 12 ELHS	Grade: 11 ELHS
FATHER				
HUGH DAWSON	<input type="checkbox"/>	<input checked="" type="checkbox"/> ☆	<input type="checkbox"/>	<input type="checkbox"/>
MOTHER				
NORA ALLEN	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> ☆	<input type="checkbox"/>
ALVIN ALLEN	<input checked="" type="checkbox"/> ☆	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GUY MENDEZ	<input type="checkbox"/>	<input checked="" type="checkbox"/> ☆	<input type="checkbox"/>	<input type="checkbox"/>
PARENT(S)				
Margey Allen	<input type="checkbox"/>	<input checked="" type="checkbox"/> ☆	<input type="checkbox"/>	<input type="checkbox"/>
MARGIE ALLEN	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> ☆	<input checked="" type="checkbox"/> ☆
TERRY ALLEN	<input type="checkbox"/>	<input checked="" type="checkbox"/> ☆	<input type="checkbox"/>	<input type="checkbox"/>
Marge Allen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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PARENT(S)

Margey Allen	<input type="checkbox"/>	<input checked="" type="checkbox"/> ☆	<input type="checkbox"/>	<input type="checkbox"/>
MARGIE ALLEN	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> ☆	<input checked="" type="checkbox"/> ☆
TERRY ALLEN	<input type="checkbox"/>	<input checked="" type="checkbox"/> ☆	<input type="checkbox"/>	<input type="checkbox"/>

Task #7 – Add a contact to a Family Group or Student

1. To add a contact to an individual student, put the student in context and navigate to **StudentInformation** » **SIS** » **Student** » **Contacts Summary**.
2. Click the **Add Contact** button to add a new contact.
3. A new Add Student Contact screen will pop up.
 - a. First, select a contact type from the dropdown at the top.
 - b. Next, fill in the appropriate fields for salutation and name.
 - c. To add a phone #, click the plus sign next to **Phone Number**.
 - d. To add a home address immediately begin typing in the address fields. If the contact's address is the same as the student's address, check **Same As Student Address**.
 - e. To add additional addresses besides Home address, click the plus sign next to **Address**, choose a type from the dropdown.
 - f. Click the plus sign next to **Email Address** to add an email address for the contact.
 - g. Fill in the contact's work information, custody code, and language preferences, if desired.
 - h. The **Legal District of Residence Change Date** is for community schools only. It is the effective date a legal guardian's district of residence changed.
 - i. The following fields are student specific: Publicly Viewable determines if the contact is viewable in ParentAccess.

Contact Comments	Relationship Comments		
<input type="text"/>	<input type="text"/>		
Contact Flags			
<input checked="" type="checkbox"/> Legal Guardian	<input checked="" type="checkbox"/> Emergency Contact	<input type="checkbox"/> Living with Student	<input type="checkbox"/> Copied on Correspondence
<input type="checkbox"/> Willing to Volunteer	<input checked="" type="checkbox"/> Medical Contact	<input type="checkbox"/> Available at Work	<input type="checkbox"/> Migrant Worker
<input type="checkbox"/> Authorized to Pick up	<input checked="" type="checkbox"/> Publicly Viewable		

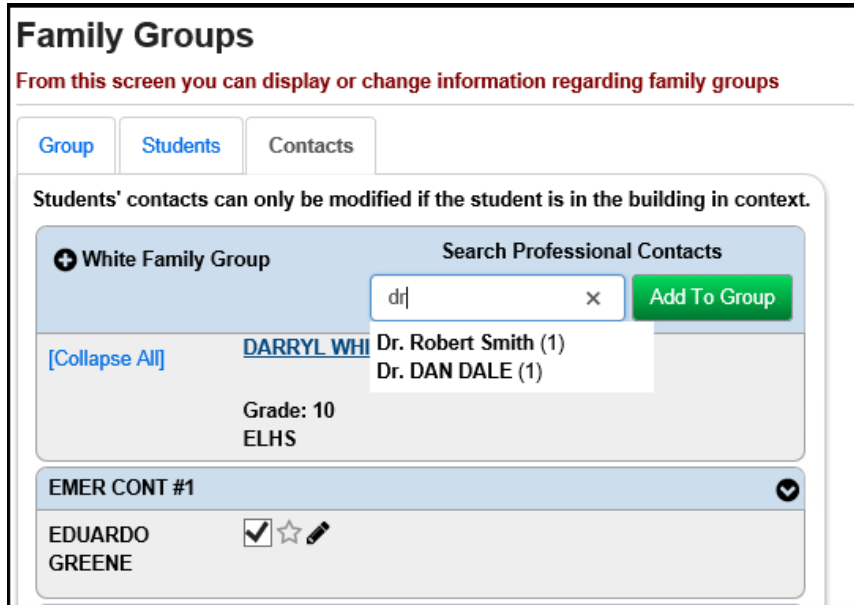
- j. Click **Save** when finished.

Task #8 – How to create a Professional Contact for the district and link the Professional Contact to multiple students

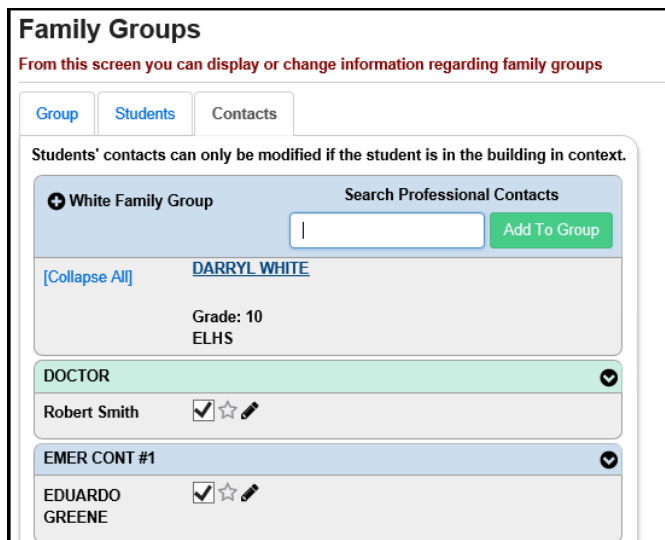
1. To add a new Professional contact to an existing family group, navigate to **StudentInformation** » **Management** » **District Administration** » **Family Groups**.
2. Enter text in the **Family Group Name** field to filter down results or leave the field blank to return all Family Groups in the district.
3. Select the Family Group by clicking on the edit pencil icon next to the group. The **Students** tab will display.
4. Move to the 3rd tab named **Contacts**.
5. To add a contact to an individual student, put the student in context and navigate to **StudentInformation** » **SIS** » **Student** » **Contacts** **Summary**.
6. Click the **Add Contact** button to add a new contact.
7. NOTE: A Professional contact must be added to a Family Group or individual student before it can be added to other students and/or Family Groups in the district.
8. A new screen will pop up.
 - a. First, select a contact type from the dropdown at the top.
 - b. The following contact types are Professional Contacts. At this time, there is no way to add an additional Professional Contact Type.
 - a. Probation Officer
 - b. Day Care Center
 - c. Dentist
 - d. Parole Officer
 - e. Therapist
 - f. Doctor
 - g. Social Worker
 - h. Hospital
 - c. Next, fill in the appropriate fields and click **Save** when finished.

The screenshot shows the 'Add Student Contact' form. At the top, there is a dropdown menu with 'Doctor' selected. Below this are four input fields: 'First Name', 'Middle', 'Last Name', and 'Suffix'. There are three expandable sections: 'Phone Number', 'Address', and 'Email Address', each with a plus icon and a collapse arrow. The 'Address' section is expanded, showing a dropdown for 'Home', and input fields for 'Address 1', 'Address 2', 'City', 'OH' (state), 'Zip', and 'Select County...'. Below these are two input fields for 'Place of Employment' and 'Occupation'. At the bottom, there are three checkboxes under 'Contact Flags': 'Emergency Contact', 'Medical Contact', and 'Publicly Viewable'.

9. Now that the Professional Contact is created, you can add the contact to any student or Family Group.
10. From the Family Groups – Contacts page, start typing in the **Search Professional Contacts** field.



11. Once the Professional Contact is selected, click **Add to Group**.
12. The Professional Contact is automatically linked to every student in the Family Group.



Family Groups

From this screen you can display or change information regarding family groups

< Prev Group: ALLEN Next Group: Allen >

Group **Students** Contacts

Students' contacts can only be modified if the student is in the building in context.

ALLEN Family Group Search Professional Contacts

Tip: Search Last Name Add To Group

[Collapse All]	ANNE ALLEN	MARCUS ALLEN	MARIO ALLEN	Sam Allen
	Grade: 09 ELHS	Grade: 06 ELMS	Grade: 12 ELHS	Grade: 11 ELHS

DOCTOR ✔

Robert Smith	<input checked="" type="checkbox"/> ☆ ✎	<input type="checkbox"/> ✎	<input type="checkbox"/> ✎	<input type="checkbox"/> ✎
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13. To add the Professional Contact to another student from the Contacts Summary page, with a student in context, start typing in the Search Professional Contacts field.
14. Once the Professional Contact is selected, click **Add**.

Student Contacts Summary

From this screen, you can display, add, change and delete student contact information.

Add Contact Search Professional Contacts: ✕ Add

PARENT(S)

DARLENE DALTON <small>Home address</small> 348 DALTON Road Elida, OH 45807-1122 County: Allen	<small>Cell:</small> (419) 555-0326 <small>Primary email:</small> ted@ad.com	<ul style="list-style-type: none"> - Legal Guardian - Medical Contact - Emergency Contact - Same as Student Address - Publicly Viewable
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Add Contact Search Professional Contacts: ✕ Add

PARENT(S)

DARLENE DALTON <small>Home address</small> 348 DALTON Road Elida, OH 45807-1122 County: Allen	<small>Cell:</small> (419) 555-0326 <small>Primary email:</small> ted@ad.com	<ul style="list-style-type: none"> - Legal Guardian - Medical Contact - Emergency Contact - Same as Student Address - Publicly Viewable
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Doctor ✎

Dr. Robert Smith	<small>Work:</small> (555) 555-5555
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