

Family Groups & Contacts Step by Step Checklist



Date	Section Number/Name	Change Description
10/17/18	Entire document	Update document
10/11/17	Entire document	Update document

Change Log

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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 8/1/18, then you would need for the default school year to be 2018-2019 when running the Family Groups Wizard.

Task #1 – Select a Family Courier option & Family Group editing option

- With the district in context, navigate to : <u>StudentInformation</u> *» Management » District Administration » District Options*.
- In the Select a Method to assign a Family Courier section, select a
 - courier assignment method.
- 3. 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.
- 4. 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.
- 5. 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.
- 6. Click Save.

District Options
From this screen, you can display and change District Options.
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 KG - KG
01 - 01
02 - 02 03 - 03
Select a method to edit Family Group Contacts
Allow edits per school OAllow edits per district
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
Annustrase Ennin Haansaa
Email Address: no-reply@YourDomain.com
Save

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 : <u>StudentInformation</u> » <u>Management</u> » <u>District</u> <u>Administration</u> » <u>Family Groups Wizard</u>.
- 3. On the **General** tab, select **Build groups with single and multiple students**.
- 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.
- 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.

n th	is so	reen	, you can run a l	Wizard to assist in the creation	on of Family Groups for yo	ur district.
Gene	ral	S	election Summary	Display Groups		
					I.	
earcl	h By:	Fai	nily Group Nam			
				Search		
			ourier for family g			
-			ily Groups Per F	future school year		
Firs			· ·	3 4 Next ▶ Last ▶		38 FamilyGroups Found
			Family Group	Description	Student Address	Students In Group
	ŵ	"	AGUILAR	AGUILAR Family Group	3487 AGUILAR Road	SAGUILAR LUIS
	Ŵ	ø	ALLEN	ALLEN Family Group	8291 ALLEN Road	ALLEN LEROY
	Ŵ	A	AVERY	AVERY Family Group	3495 AVERY Road	AVERY MARSHA
	Ŵ	ø	AYERS	AYERS Family Group	7310 AYERS Road	AYERS DUSTIN
	Ŵ	ø	BISHOP	BISHOP Family Group	4678 BISHOP Road	BISHOP FERNANDO
	Ŵ	"	BLACKWELL	BLACKWELL Family Group	1598 BLACKWELL Road	BLACKWELL ANNETTE BLACKWELL MATHEW
	Ŵ	ø	CARR	CARR Family Group	7075 CARR Road	CARR JOSE
	Ŵ	A	CHANG	CHANG Family Group	7166 CHANG Road	CHANG TONYA
	Ŵ	ø	сох	COX Family Group	9256 COX Road	COX ALFREDO
	ŵ		CURRY	CURRY Family Group	1319 CURRY Road	CURRY ERIN
	0					
< Ba	_					

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.

⑪	S	ALLEN	ALLEN Family Group	8291 ALLEN Road	ALLEN, MARCUS ALLEN, MARIO	•
⑪		ALLEN	ALLEN Family Group	8291 ALLEN Road	ZALLEN, ANNE	٠

- 11. Go to <u>StudentInformation</u> » <u>Management</u> » <u>District Administration</u> » <u>Family Groups</u>. 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 for 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**.

	mily Grou	•	isplay or ch	nange informatio	on regard	ling family g	roups							
< F	rev Group: ALLE	N	Next Group	: ALLEN >										
Gr	oup Student	ts	Contacts											
			Is Courier	Student	Gra	ade Schoo	I	Student Number	Phone Number	Addres	s	Gender	Active	
		匬		ALLEN, MARC	US 06	Elida N	liddle School	24004	(419) 555-3327	8291 AL	LEN Road	м		
Fa	amily Group	圃		ALLEN, MARIO	0 12	ELIDA	HIGH SCHOOL	18370	(419) 555-3327	8291 AL	LEN Road	м	•	
N	Name: ALLEN Show Active Only C This student is enrolled in a future school year													
		Stude	nt Name: 🛛	allen	P	hone Numb	er:							
		Street	Address:			Search								
	Back													
Ad	d Selected Stude	nts												
	FirstName 🔺	LastN	ame Mid	dleName Grad	le Stud	ent Number	Phone Numbe	r Address	BirthDate	Gender	Is Active	Family G	iroups	
	ANNE	ALLE	N	09	2108	8	(419) 555-3821	8291 ALLEN Roa	ad 03/27/2003	F		ALLE	EN	
	CLIFFORD	ALLE	4	12	1839	6	(419) 555-7401	8291 ALLEN Roa	ad 12/17/1998	м		ALLE	EN	
	FRANCISCO	ALLE	N	07	2330	7	(419) 555-9394	8291 ALLEN Roa	ad 02/18/2005	м		ALLE	EN	

< Prev G	roup: ALLE	N	Next Group	ALLEN >							
Group	Studen	ts	Contacts								
			Is Courier	Student	Grade	School	Student Number	Phone Number	Address	Gender	Activ
		Ŵ		ALLEN, ANNE	09	ELIDA HIGH SCHOOL	21088	(419) 555-3821	8291 ALLEN Road	F	•
Family (Group	Ŵ		ALLEN, MARCUS	06	Elida Middle School	24004	(419) 555-3327	8291 ALLEN Road	м	٠
Name:		⑪		ALLEN, MARIO	12	ELIDA HIGH SCHOOL	18370	(419) 555-3327	8291 ALLEN Road	М	•
		~	Show Active	e Only				C This s	tudent is enrolled in a	future sch	iool yea
		Stud	ent Name: 🛛	llen	× Phon	e Number:					
		Stree	et Address:		Sea	arch					

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

Task #3 – Create a single Family Group

1. Navigate to <u>StudentInformation</u> » <u>Management</u> » <u>District</u> <u>Administration</u> » <u>Family Groups.</u>

- 2. Click Add Family Group.
- 3. Enter a Name and an optional Description.

Family	Groups	;	
From this s	creen you cai	n display or c	hange information regarding family groups
Group	Students	Contacts	
Name:*	White		
Descriptio	White Fam on:	ily Group	
Save	Back		

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**.

	up Studer	nts	Contacts												
			Is Courier	Student	Grade	School	Student Numbe	Phone N	umber	Address	Gender	Active			
a	nily Group					The	re are no records	o display							
la	ne: White	~	Show Activ	e Only				C This st	udent is e	enrolled in a	future sch	ool year			
		Stud	ent Name:	white		Pho	ne Number:								
		Stre	et Address:			Se	arch								
	_					_									
B	ack														
id	Selected Stud	ents													
	FirstName 🔺	Las	stName Mi	ddleName	Grade	Studer	nt Number Pho	e Number	Addres	s	BirthDa	te Gend	er Is Acti	re Fami	y Gro
	DARRYL	WH	IITE		10	20007	(419	555-8481	9651 W	/HITE Road	01/22/2	002 M			
]	IDA	WH	IITE		KG	30097	(419	555-5284	9651 W	/HITE Road	01/16/2	012 F		v	HITE
	nily Grou	ine													
	-	· ·		change info	ormation	regardin	q family groups								
	-			7			5								
ro	up Studer	its	Contacts												
			Is Courier	Student		Grade	School	Stu	dent Nu	mber Pho	one Numbe	er Addres	s	Gender	Activ
a	nily Group	ŵ		WHITE, D	ARRYL	10	ELIDA HIGH SC	HOOL 200	07	(41	9) 555-848	1 9651 W	HITE Road	М	•
la	me: White	✓	Show Activ	e Only							C Th	is student is	enrolled in a	a future scl	nool ye
		Stud	ent Name:	white		Phor	e Number:								

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

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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.
- Click on their name in the context area or navigate to <u>StudentInformation</u> » <u>SIS</u> » <u>Student</u> » <u>View Profile</u>.
- 3. If the student is in a Family Group, it will show at the bottom of the page.

HITE, DA	RRYL			
m this screen,	you can view the stu	ident's profile.		
				I want to
Address:		HITE Road H 45807		
Phone Number Email Address:	(,	5-8481 🗌 Unlisted		NO
Parent/Guardia	n: WHITE,	RAMONA		PHOTO
	WHITE,	KENT		AVAILABLE
Parent/Guardia	n: W: (419) 555-5088		
	M: (419) 555-8481		
Parent/Guardia	n: WHITE,			
	W: (419) 555-5650		
Student Status	: ACTIVE	RES		
Birthdate:	1/22/200)2		
Ethnicity:	WHITE			
Program:				
Academic Lock				
Admission Hist	tory: 8/29/200)7 - Enrolled		
EMIS Situation	: 9 - Resi	dent attending but take	s JVS satellite courses P/T	
Percent of Time	e: 86%			
Report to EMIS	: 🗹			
Effective Date:	7/1/2017	7		
	urier for family group olled in a future schoo	l vear		
Family Group	Description	Student Address	Students In Group	
White	White Family Group	9651 WHITE Road	WHITE, DARRYL	ELIDA 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.

HITE, DARRY		
om this screen, you ca	view the student's profile.	
Address: Phone Number: Email Address:	9651 WHITE Road Elida, OH 45807 (419) 555-8481 [] Unlisted	For this Student's Profile - Vew/Caft Full Schedule - Vew/Capty Fees - Vew The Medical Health Log - View This Student's Memberships - View Today's Schedule
Parent/Guardian:	WHITE, RAMONA WHITE, KENT	- View Contacts - View Lockers - View A Student's Family Group - View A Student's Discipline Incidents - View Latest Report Card
Parent/Guardian:	W: (419) 555-5088 M: (419) 555-8481 WHITE, MISTY	- View Student Roadmap
Parent/Guardian:		
A	CTIVE RES	

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Rev.10/1//2018 v.18.4.1 5. The link will take you to the following page: <u>StudentInformation</u> *» Management » District Administration » Family Groups.*

Group	Studen	its	Contacts										
			Is Courier	Student	Grade	School	Student Number	Phone Number	Address	Gender	Active		
Family Group		Ŵ		WHITE, DARRYL	10	ELIDA HIGH SCHOOL	20007	(419) 555-8481	9651 WHITE Road	м	•		
	White	~	Show Active	e Only				C This student is enrolled in a future school year					
		Student Name: Phone Number:											
		Stree	et Address:		Sea	arch							

Task #5 – Review existing District Family Groups

1. Navigate to <u>StudentInformation</u> » <u>Management</u> » <u>District</u> <u>Administration</u> » <u>Family Groups.</u>

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.

Fai	mil	y Groups				
From	this	screen you can di	splay or change inforn	nation regarding family	groups	
Sear	ch By	7: Family Group N	ame ∽			
alle	en		× Search			
Ad	d Fan	nily Group				
	Stude	ent is courier for fam	ily group			
C.	This s	student is enrolled ir	n a future school year			
Num	ber o	f Family Groups P	er Page: 10 🗸			
		Family Group	Description	Student Address	4 FamilyGro Students In Group	oups Found
匬		ALLEN	ALLEN Family Group	9738 MIRANDA Road	ALLEN, CLIFFORD	
Ш	G	ALLEN	ALLEN Failing Group	9730 MIRANDA KOđu	BRIGHT, ROBERTO MIRANDA, PATRICIA MORSE, ARLENE MORSE, PERRY	
圓	\$	ALLEN	ALLEN Family Group	8291 ALLEN Road	ALLEN, ANNE	•
					ALLEN, LEROY ■ALLEN, MARCUS ALLEN, MARIO Allen, Sam	
圓	A 1	ALLEN	ALLEN Family Group	8291 ALLEN Road	ALLEN, FRANCISCO	•
圃		ALLEN	ALLEN Family Group	8291 ALLEN Road	ALLEN, THEODORE	•
✓	Shov	w 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**.

Prev Gro	up: ALLE	N	Next Group	: Allen >										
roup	Student	ts	Contacts											
			Is Courier	Student		Grade	School		Student Number	Phone Number	Addres	s	Gender	Active
		ŵ		ALLEN,	ANNE	09	ELIDA I	HIGH SCHOOL	21088	(419) 555-3821	8291 AL	LEN Road	F	٠
amily Gr	oup	ŵ		ALLEN,	MARCUS	06	Elida M	iddle School	24004	(419) 555-3327	8291 AL	LEN Road	М	•
lame:		Ŵ		ALLEN,	MARIO	12	ELIDA I	HIGH SCHOOL	18370	(419) 555-3327	8291 AL	LEN Road	М	•
		•	Show Active Only						C This		student is enrolled in a future school year			ool year
		Stud	lent Name:	allen		Phon	e Numbe	r:						
		Stre	et Address:			Sea	irch							
Back														
d Select	ed Studer	nts												
First	Name 🔺	Last	tName Mid	dleName	Grade	Student	Number	Phone Number	r Address	BirthDate	Gender	Is Active	Family G	roups
CLIFF	ORD	ALLI	EN		12	18396		(419) 555-7401	8291 ALLEN Roa	ad 12/17/1998	м		ALLE	N
FRAN	ICISCO	ALLI	EN		07	23307		(419) 555-9394	8291 ALLEN Roa	ad 02/18/2005	м		ALLE	N
LERO	γ	ALLI	EN		12	16217		(419) 555-3821	8291 ALLEN Roa	ad 04/12/1998	м		ALLE	N
MICH	EAL	ALLI	EN		03	26237		(419) 555-9394	8291 ALLEN Roa	ad 11/28/2007	м		ALLE	N
Sam		Aller	n		11	2008016	13		PO box 100	01/01/2000	М		Alle	n
THEC	DORE	ALLI	EN		10	20430		(419) 555-3462	8291 ALLEN Roa	ad 05/27/2002	М		ALLE	N
-	Grou													
this sci	reen you	can	display or ch	ange info	rmation re	egarding	family gi	roups						
rev Grou	IP: ALLEN	4	Next Group	Allen >										
oup	Students	s	Contacts											
			Is Courier	Student		Grade	School		Student Number	Phone Number	Addres	5	Gender	Active
		ŵ		ALLEN,	ANNE	09	ELIDA I	HIGH SCHOOL	21088	(419) 555-3821	8291 A	LLEN Road	F	•
		ŵ		ALLEN,	MARCUS	06	Elida M	iddle School	24004	(419) 555-3327	8291 A	LLEN Road	м	•
mily Gro	oup	ŵ		ALLEN,	MARIO	12	ELIDA I	HIGH SCHOOL	18370	(419) 555-3327	8291 A	LLEN Road	м	٠
ame: A	ALLEN	ŵ		Allen, Sa	ım	11	ELIDA I	HIGH SCHOOL	200801643		PO box	: 100	м	•
		~	Show Active	e Only						C This	student is	enrolled in	a future scl	hool year
		Stud	ent Name: a	illen		× Phon	e Numbe	er:						
			E					·						

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.

Prev Gr	oup: ALLE	N [Next Group	: Allen >							
Group	Student	s	Contacts								
			Is Courier	Student	Grade	School	Student Number	Phone Number	Address	Gender	Active
		Ô		ALLEN, MARCUS	06	Elida Middle School	24004	(419) 555-3327	8291 ALLEN Road	м	٠
Family G	iroup	ŵ		ALLEN, ANNE	09	ELIDA HIGH SCHOOL	21088	(419) 555-3821	8291 ALLEN Road	F	٠
	ALLEN	Û		ALLEN, MARIO	12	ELIDA HIGH SCHOOL	18370	(419) 555-3327	8291 ALLEN Road	м	٠
Humor	, LLLIT	•	Show Active	e Only				C This s	tudent is enrolled in a	a future sch	iool yea
		Stud	ent Name: 🛓	illen	× Phon	e Number:					
		Stree	et Address:		Sea	rch					

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 (<u>StudentInformation</u> » SIS » Student » Contacts Summary).

m this screen yo	-	ge information regardin	g family groups	
Group Student	s Contacts			
udents' contacts	can only be modified	I if the student is in the	building in context.	
CALLEN Family	y Group		Search Profe	ssional Contacts
			1	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				Ø
HUGH DAWSON	A	< < ♪	A	
MOTHER				0
NORA ALLEN	l de la companya de l	(\$	✔ ☆ 🌶	A
ALVIN ALLEN	🗸 🛨 🖋	A		
GUY MENDEZ	- de	✓ ☆ 🖋	I	l de la companya de l
PARENT(S)				0
Margey Allen	a da	✓ ☆ Ø	a di se	A
MARGIE ALLEN	A	ser .	🗸 🛨 🖋	se s
TERRY ALLEN		🖌 🜟 🖋	- de la companya de l	a de la calegra
Marge Allen	A	I	*	🗸 🜟 🖋
Back				
	the mouse	over a conta	ct to see m	-
ARENT(S) argey Allen		✓ ☆ Ø	I	
Box 100			@ ✓ ★ Ø	
awa OH 45875				
RRYALLEN	A	✓ ★ Ø		
arge Allen	\$	5	S	🖌 🜟 🖋

StudentInformation copyright Family Groups & Contacts 12 of 17 Rev.10/17/2018 v.18.4.1 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.

Group Students Contacts Students' contacts can only be modified if the student is in the building in context. Image: All contacts Tip: Search Professional Contacts Tip: Search Last Name Add To Group [Collapse All] ANNE ALLEN MARCUS ALLEN MARIO ALLEN Sam Allen Grade: 09 Grade: 06 Grade: 12 Grade: 11 ELHS ELHS ELHS ELHS FATHER Image: All on the student of the student	Family Group		information regardin	g family groups			
Search Professional Contacts Tip: Search Last Name Add To Group [Collapse All] ANNE ALLEN MARCUS ALLEN MARIO ALLEN Sam Allen Grade: 09 Grade: 06 ELHS ELHS FATHER HUGH DAWSON Image: Allen Image: Allen Image: Allen Image: Allen Search Professional Contacts Tip: Search Last Name Add To Group Image: Allen Image: Allen Image: Allen Image: Allen Image: Allen Image: Allen <td>Group Students</td> <td>Contacts</td> <td></td> <td>1</td> <td></td> <td></td> <td></td>	Group Students	Contacts		1			
Tip: Search Last Name Add To Group [Collapse All] ANNE ALLEN MARCUS ALLEN MARCUS ALLEN Grade: 09 Grade: 06 ELHS ELHS FATHER HUGH DAWSON Image: Allen Image: Allen Image: Allen Add To Group Add To Group Add To Group Image: Allen Image: Allen ANNE ALLEN Margie Allen Image: Allen	Students' contacts c	an only be modified if	the student is in the	building in context.			
[Collapse All] ANNE ALLEN MARCUS ALLEN MARIO ALLEN Sam Allen Grade: 09 Grade: 06 Grade: 12 Grade: 11 ELHS ELMS ELMS ELHS FATHER HUGH DAWSON Image: Imag	ALLEN Family	Group		Search Profes	sional Contacts		
Grade: 09 Grade: 06 Grade: 12 Grade: 11 ELHS ELMS ELHS ELHS FATHER HUGH DAWSON Image Allen Image				Tip: Search Last Nan	ne 🛛 🛛 Add To G	iroup	
ELHS ELMS ELHS ELHS FATHER Image: Constraint of the state of the sta	[Collapse All]	ANNE ALLEN	MARCUS ALLEN	MARIO ALLEN	Sam Allen		
HUGH DAWSON Image Allen Image Allen							
MOTHER NORA ALLEN Image Allen	FATHER					0	
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GUY MENDEZ Image: Constraint of the state of the sta	NORA ALLEN	A	Ø	✔☆♪	A		
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Margey Allen Image: Allen I	GUY MENDEZ	S	✓ ☆ 🌶	- A	*		
MARGIE ALLEN Ø Ø Ø	PARENT(S)					0	
	Margey Allen	A	✓ ☆ Ø	S			
TERRY ALLEN 🖉 🚽 📝	MARGIE ALLEN	A	A	🖌 🜟 🖋	√ ★ ∅		
	TERRY ALLEN	- I I I I I I I I I I I I I I I I I I I	🖌 🜟 🖋	5			
Marge Allen	Marge Allen	A	A	@ *			
Back	Back						
PARENT(S)	PARENT(S)						0
Margey Allen	Margey Allen	S	✔☆♪	(•	<u> </u>	
MARGIE ALLEN \checkmark	MARGIE ALLEN	A	A	✓ ★	ð	🗸 ★ 🖋	
	TERRY ALLEN	6 2	🗸 ★ 🖋		•	A	

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

- To add a contact to an individual student, put the student in context and navigate to <u>StudentInformation</u> » <u>SIS</u> » <u>Student</u> » <u>Contacts</u> <u>Summary</u>.
- 2. Click the **Add Contact** button to add a new contact.
- 3. A new 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** and 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	
Contact Flags			
🖌 Legal Guardian	Emergency Contact	Living with Student	Copied on Correspondence
Willing to Volunteer	Medical Contact	Available at Work	Migrant Worker
Authorized to Pick up	Very 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

- To add a Professional contact to an existing family group, navigate to <u>StudentInformation</u> » <u>Management</u> » <u>District Administration</u> » Family Groups.
- 2. Search for a d*
- 3. Family Group.
- 4. Once the desired Family Group is selected, move to the 3rd tab named **Contacts**.
- To add a contact to an individual student, put the student in context and navigate to <u>StudentInformation</u> » <u>SIS</u> » <u>Student</u> » <u>Contacts</u> <u>Summary</u>.
- 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.

Doctor First Name Middle Last Name * Suffix Phone Number Address Home Address 1 Address 2 City OH ~ [Zip Select County ~	
Address Home Address 1 Address 2 City OH Zip Select County	
Home Address 1 Address 2 City OH V Zip Select County V	
•	1
Place of Employment Occupation	
Contact Flags	
Emergency Contact Medical Contact 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.

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		Grade: 10 ELHS			
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- 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.

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Add Contact			Search Professional Contacts		
PARENT(S)				Dr. Robert Smith (2) Dr. DAN DALE (1)	1
DARLENE DALTON	Cell: (119) 555-0326	- Legal Guardian - Emergency Contact	 Medical Contact Publicly Viewable 		
M8 DALTON Road Jida, OH 4507-1122 County: Allen	Primary email: test@asl.com	 Same as Student Address 			
tudent Contacts Summary	e student contact information.				
Add Contact			Search Professional Contacts	1	Ad
PARENT(S)					1
DARLENE DALTON	Cell: (419) 555-0326	 Legal Guardian Emergency 	 Medical Contact Publicity Viewable 		
Home address 948 D.AL.TON Road Elida, OH 45807-1122 County: Allen	Primary email: http://pail.com	Contact * Same as Student Address			
்ற Doctor					1
	Work: (555) 555-5555				