Introduction to:
Student Contact Information

April 2021

Student Contact Information

- **Module Assignment**

  - **Student Enrollment**
    - Student Contact Information

- **Report Assignment**

  - **Reports > Student Enrollment >**
    - **Student Contact Report**

Important Notes:
- Student Contact Information module is used for students who are enrolled.
- Once a student is enrolled, the "Contacts Tab" in Student Registration becomes obsolete (as does Student Registration module in general).
- If contacts are entered in Student Registration Information module, once a student becomes enrolled, the contacts will "follow through" to Student Contact Information.
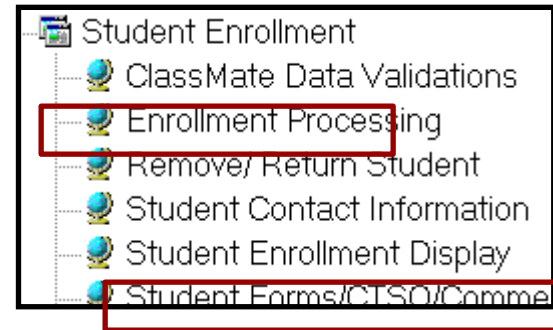
Student Contact Information

Getting Started

Double click > **My Modules** > Double Click

Student Enrollment > Single click **Student Contact Information**

Pre-Requistes

Student Contact Types must be set up under System Administrator > Master Codes Maintenance. They are found in the 100-199 section of codes. You will want to review the entries there and make any new entries before adding contacts to students.

Overview

The Student Contact Information module is used to add, edit, update or remove contact information related to a student.

Each new contact is controlled by the "Type" of contact. You can have only 1 of each "Type" of contact. Therefore, if you need to have 2 (two) of the same contact, you need to create 2 of that contact type.

Example: A student has 2 Aunt's that are included as contacts. There needs to be an Aunt 1 and an Aunt 2 created so that each Aunt can be assigned a different contact type.

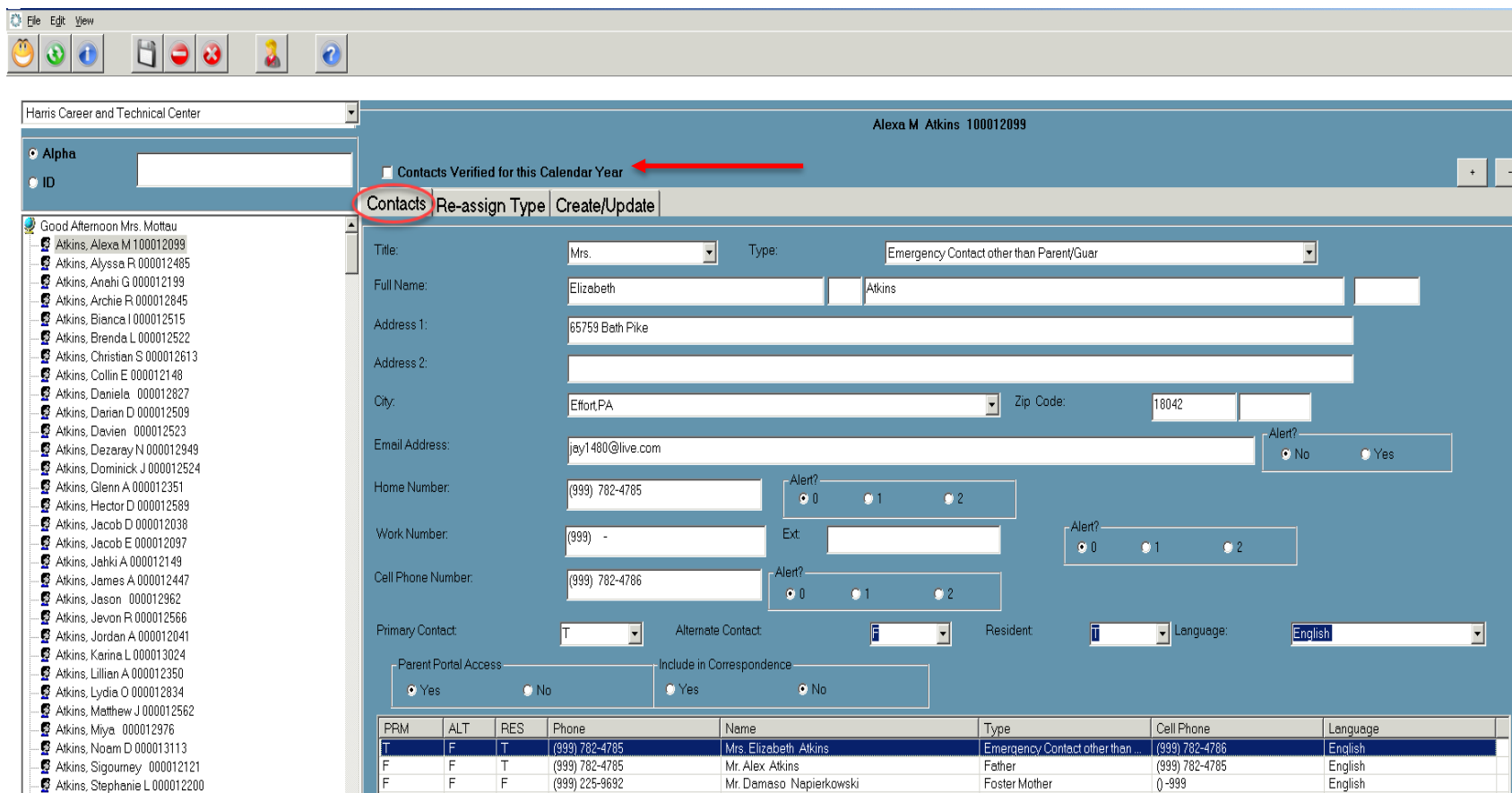# Student Contact Information

Student Contact Information – Contacts Tab

Select a Student from the list (if your student does not appear in the list, you will need to change your location to the Primary location of that student)

1. Select a Title from the dropdown
2. **Select a Type from the dropdown (remember – this is what generates a NEW contact)**
3. Enter the Full Name (First, Middle Initial, Last, Suffix)
4. You will notice the address of the STUDENT auto-populates. CHANGE this if it isn't correct.
5. Enter Email address (if known – this is required if your site allows Parent Portal access)
6. Enter Home Number (students will populate – change if different than students), Work Number, Cell Phone Number (if known)
7. Primary Contact should be set to T for the Primary Contact – there can only be ONE (1), every student **MUST HAVE** one primary contact.
8. Alternate Contact can be set to T for any contact that is an alternate contact. You cannot be both Alternate Contact and Primary Contact. This field has been added for NY SIRS reporting.
9. Resident can be set to T for any contact that resides with the student
10. Language (if known)
11. Include in Correspondence can be set to T for any contact that should receive Mailings regarding this student (Progress Reports, Report Cards, Attendance Letters, Suspension Letters, etc)
12. Parent Portal Access (used with sites who have Parent Portal) can be set to T if this contact should require access to view this student using the Parent Portal (if "T" valid email address required)
13. Click the Black Save disk when completed filling in all the information that is known

Student Contact Information

Contacts Verified for this Calendar Year

This checkbox works in conjunction with the Parent Portal, if your site uses the "Emergency Contact" functionality of the portal. That allows contacts to go on the Parent Portal and verify their Contact Information. If they check the box on the Parent Portal, the box in this module will reflect that the Contact Information has been reviewed and "verified"

Student Contact Information

Student Contact Information – Contacts Tab Alerts

ClassMate can identify data fields to pull for doing extracts to send information to 3rd party companies (such as BlackBoard, AlertNow, etc) based on below set up.
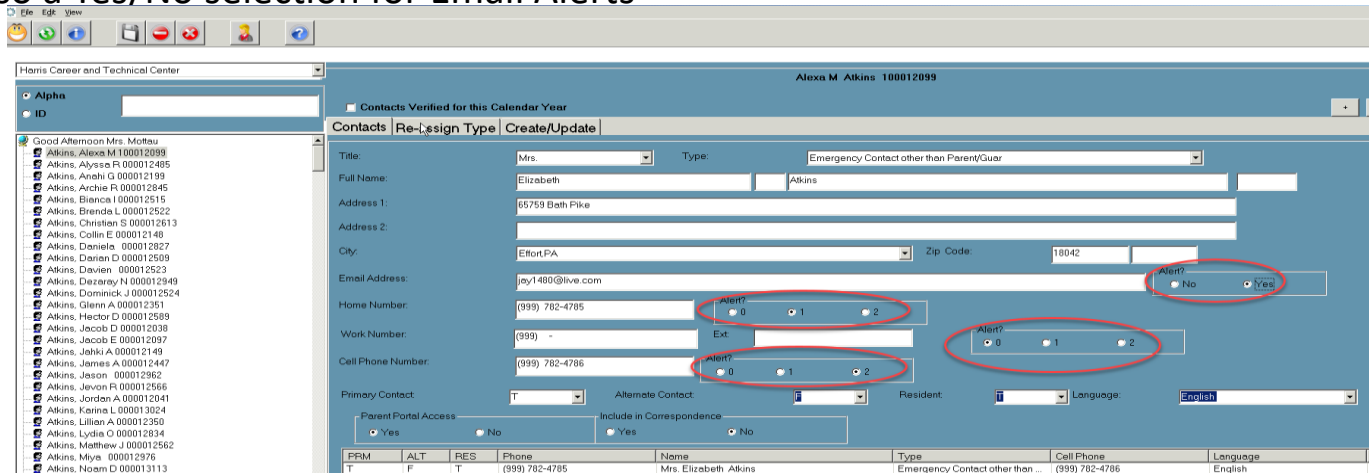
The Alerts work as follows:

0 means don't call at all, 1 is the first to call, 2 is the second.

You can only have one 1 and one 2 setting, even if you have 3 different phone numbers for that contact.

But, each contact is separate from the others, so Mom could have Home, Work, and Cell and have them set to 2, 0, 1 and then Dad could have Home and Work only and have them set to 1, 0. Or any combination.

There is also a Yes/No selection for Email Alerts

Student Contact Information

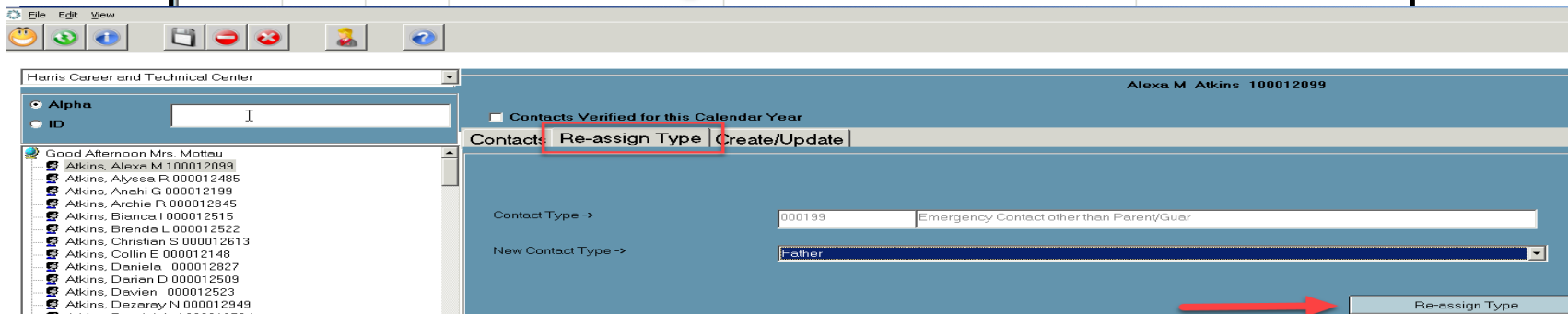## Student Contact Information – Re-assign Type Tab

The Re-Assign Type tab is used to re-assign a student contact to be a different "Type".

Example: Carmen Mottau was an Emergency Contact, but needs to be re-assigned to be Father.

Select Student

1. On the contacts tab – click the contact who needs to be re-assigned

2. Click the Re-Assign Type tab

3. Select the new contact type

4. Click the Blue Re-Assign Type button

5. Back on the Contacts tab – notice the changed contact type
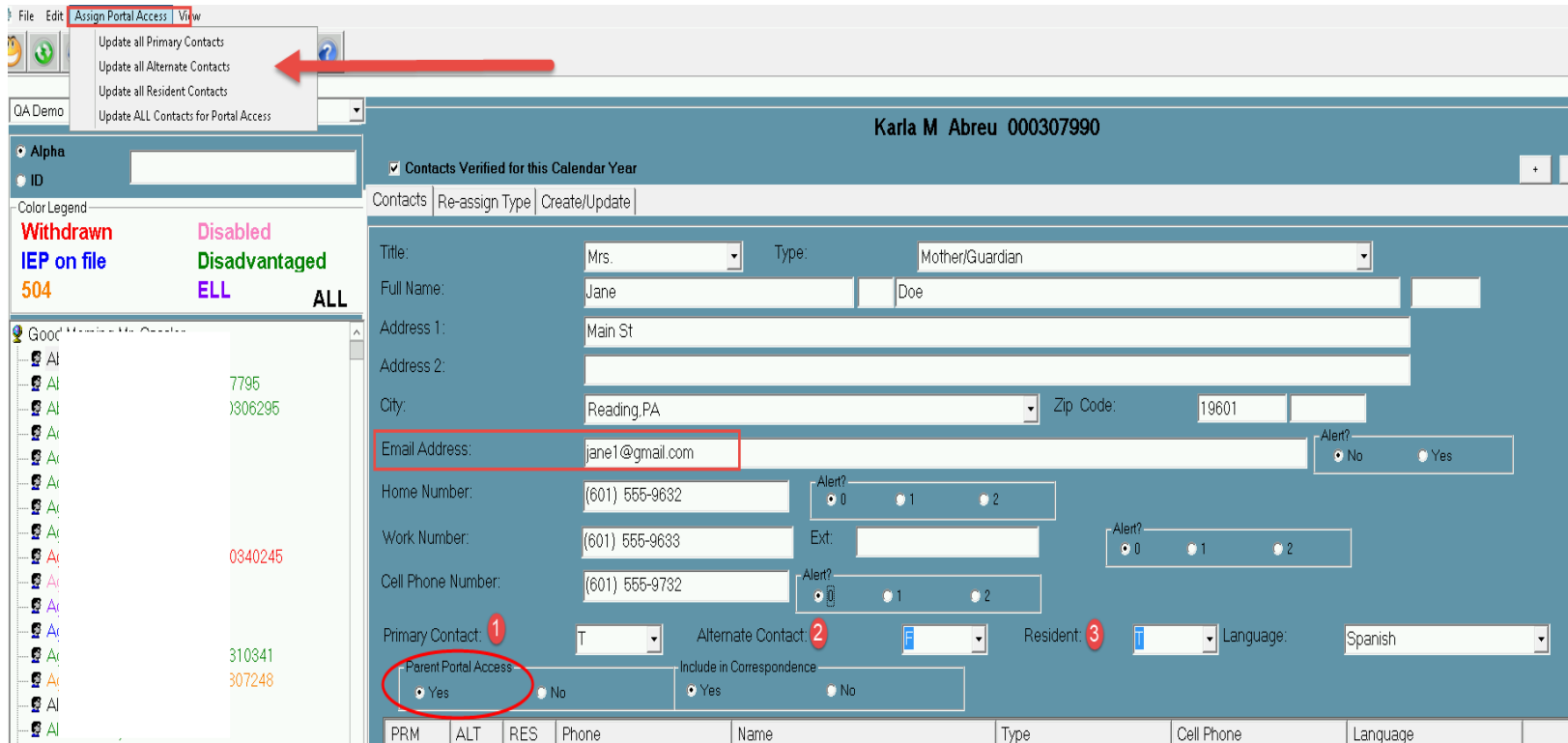
Student Contact Information

Mass Updating Parent Portal Access

Update contacts who have an Email Address assigned to have Parent Portal Access by following the steps below:

Select Assign Portal Access from top menu

1. Primary Contact = T – select Update all Primary Contacts

2. Alternate Contact = T – select Update all Alternate Contacts

3. Resident Contact = T – select Update all Resident Contacts

Or you can choose Update ALL Contacts for Portal Access to update All contacts who have an Email Address assigned.

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