

Updating Information for a Contact

Each section contains information for a single Contact:

Dolores Smith Guardian 1 Mother								
TYPE		ATTENDANCE	EMERGENCY	PTO	TEXT MESSAGE	PRIMARY PHONE	DISTRICT CONTACT FLAG	
Cell Phone:	733-555-9876 x [] Verizon []	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[]	[]
Cell Phone:	732-598-0687 x [] Alltel []	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	[]	[]
Cell Phone:	809-777-0001 x 567 Alltel []	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	[]	[]
Email (Home):	gclano@genesisedu.com []			<input type="checkbox"/>				[]
Email (Home):	rwd@aol.com []			<input type="checkbox"/>				[]
Email (Home):	jrusak@gmail.com []			<input type="checkbox"/>				[]
Add Phone/Email	Home Email [] []	<input type="button" value="Save All Changes"/>						

Information for one Contact

Each “Contact” represents one person in a student’s life (e.g. Mother, Grandmother, Uncle), or a single organization (e.g. Doctor’s practice, Hospital).

You MAY be able to update the Contact information directly on the screen: this is under the control of your school district. They may allow you to update the information directly, or you may only be able to view it.

Updating a Contact’s Email and Phone Numbers

You can do three things to the email addresses and phone numbers:

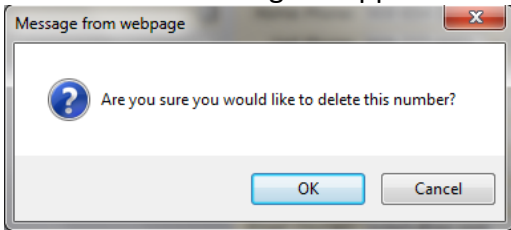
- Change the information
- Remove (i.e. delete) the information
- Add new phone numbers and email addresses

WARNING: You can only do these things if your school district gives you permission. This section assumes that you have such permission – if you cannot do the things described here, it is because your district has not given you permission to do them: it is not because the system is broken.

Deleting a phone number or email address: Find the delete trashcan icon corresponding to the phone number or email you wish to delete and click it:



A confirmation dialog will appear:

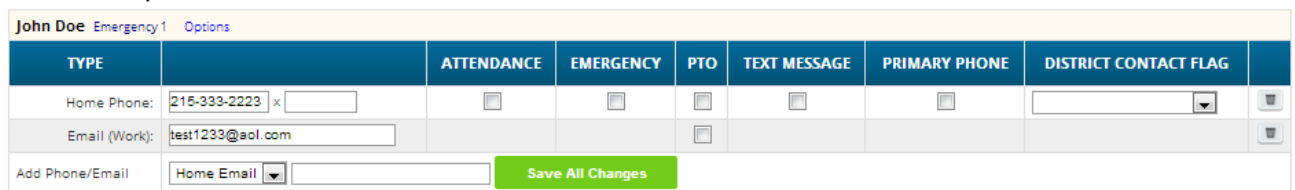


Click the OK button to continue and delete the email address or phone number. Click Cancel to abandon the deletion and keep the information.

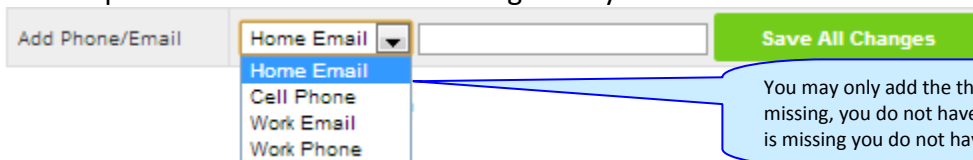
Adding a phone number or email address: To add a new phone number or email address locate the “Add Phone/Email” tool at the bottom of the Contact’s information:



Make sure you locate the Add Phone/Email for the correct Contact. Each Contact has their own Add Phone/Email field:



The drop down contains the list of things that you can add to the Contact:



You may only add the things in this list. If something is missing, you do not have permission to add it (e.g. if “Email” is missing you do not have permission to add Emails).

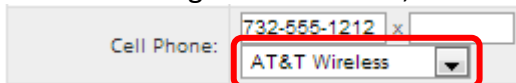
Select the type of information you want to add.

Then move to the blank text field and enter the phone number or Email address.

Go to the top or bottom of the screen and click the **Save All Changes** button.

Adding a Cell Provider information to an existing phone number: For Genesis to send text messages to a Cell number, the cell service provider (e.g. Verizon, AT&T, Sprint, T-Mobile) must be specified. It is not possible to send text messages without that information. “Text messages” include the notifications that can be sent, for example, when a student’s gradebook grades are updated. If the cell service provider is selected, but is wrong, the number will not receive the messages that are sent.

To set or change a cell number, locate the “Provider” drop down below the phone number itself:



Select your provider, then scroll up or down (to the top or bottom of the page) and click the **Save All Changes** button.

Adding a New Contact

If you have a **Show Add Contact...** button at the bottom left of a student's list of contacts, you have permission to add a new contact! If you do not see that button, you do not have permission to add a contact: please contact your school to update contact information.

To add a Contact, click on the **Show Add Contact...** button. This brings up the "New Contact" area right below the button:

Enter the following fields:

- Contact First Name – The person's last name
- Contact Last Name – The person's first name
- Relationship to Student – Select the new Contact's relationship to the student: Friend? Neighbor? There are dozens of relationships listed. It is important to select the correct one.
- Is the person an Emergency Contact for your child? Do you want them to be contacted in an emergency? If yes, select one of the Emergency Contact options.

You can enter up to six emergency contacts for each of your students. Emergency contacts are people you wish to be called in the event of an emergency. Enter in the order in which you would like these people to be contacted.

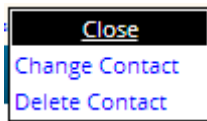
Once you have entered all the information, click the **Add Contact** button to add the new Contact.

WARNING: If you have more than one student, and you wish the new contact to be used for all your students, you must add them separately to each child's contacts.

Changing Relationship Information for or Deleting an Existing Contact

If you have permission to update information for a contact, there will be an **Options** button in the top line of the contact's information. To update the name information for a contact or to delete the contact entirely, use this **Options** button:

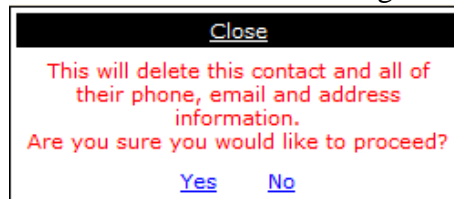
When you click **Options** , a popup appears:



The popup gives you three options:

- **Close** - Clicking the Close button dismisses the popup and makes no changes.
- **Change Contact** - Clicking **Change Contact** lets you change the **name** and **relationship** information for this Contact. (Phone numbers and Email Addresses are changed as described above.)
- **Delete Contact** - Clicking **Delete Contact** removes the contact entirely. This removes the whole contact: name, phone numbers and email addresses. Warning: There is no UNDO button.

Deleting a Contact: When you click **Delete Contact** the following confirmation dialog appears:



If you click **Yes**, the contact and all their information is permanently removed. If you click **No**, then the popup is closed and the contact is not deleted.

Changing a Contact: When you click **Change Contact** the following popup appears:

You can change the contact’s **First** or **Last** name, and set whether they are an Emergency Contact or not. To make changes to the contact, update the information, then scroll to the top or bottom of the screen and click the **Save All Changes** button.