# Addresses and Contacts

This document explains the Addresses and Contacts screen on the Student Info screen. Within this screen, Office Managers/ Registrars have the ability to add and edit the students' address and contact information. This document also explains how Office Managers/Registrars can run the Invalid Addresses Report.

Adding or Updating Student Information

It may be necessary for Office Managers/ Registrars to make changes to a student's Demographic information such as their emergency contacts, home or mailing addresses, phone numbers and email address.
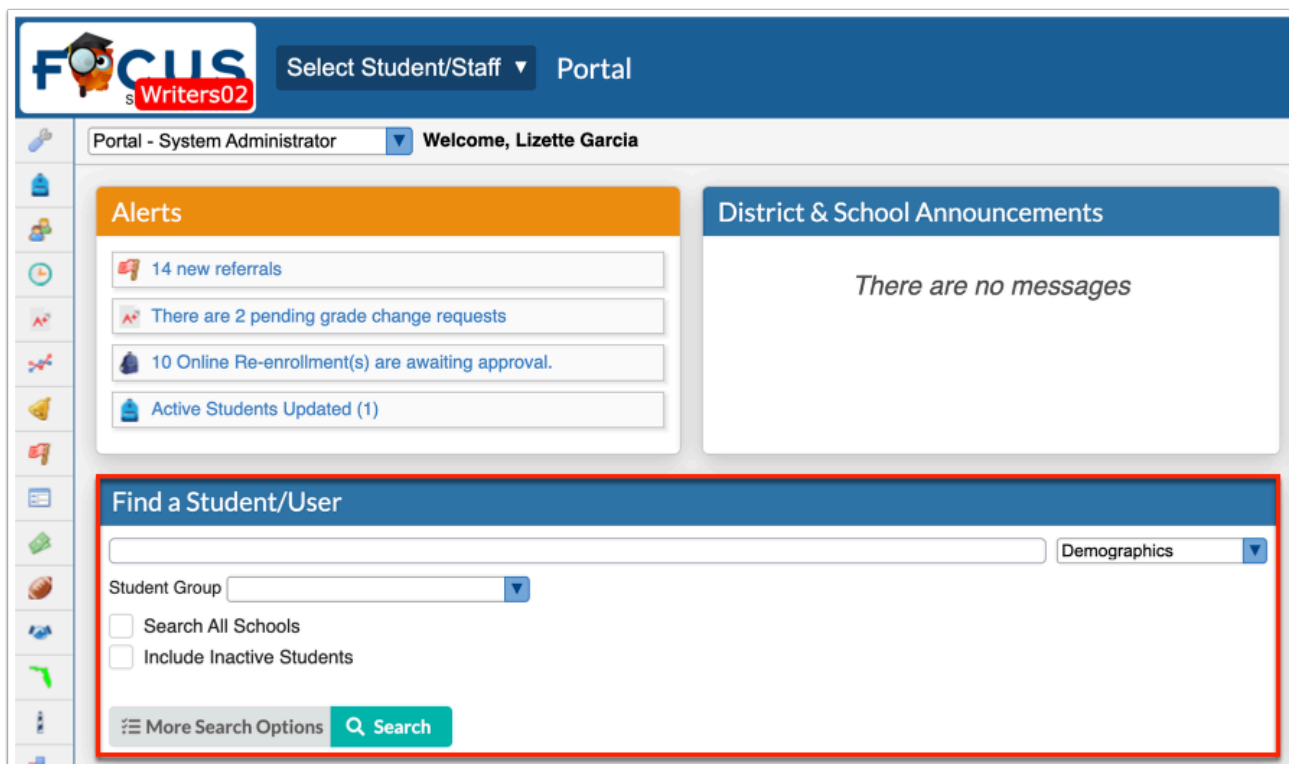
From the Portal **Select Student/Staff** pull-down, select or filter by Name/Student ID to find a student.
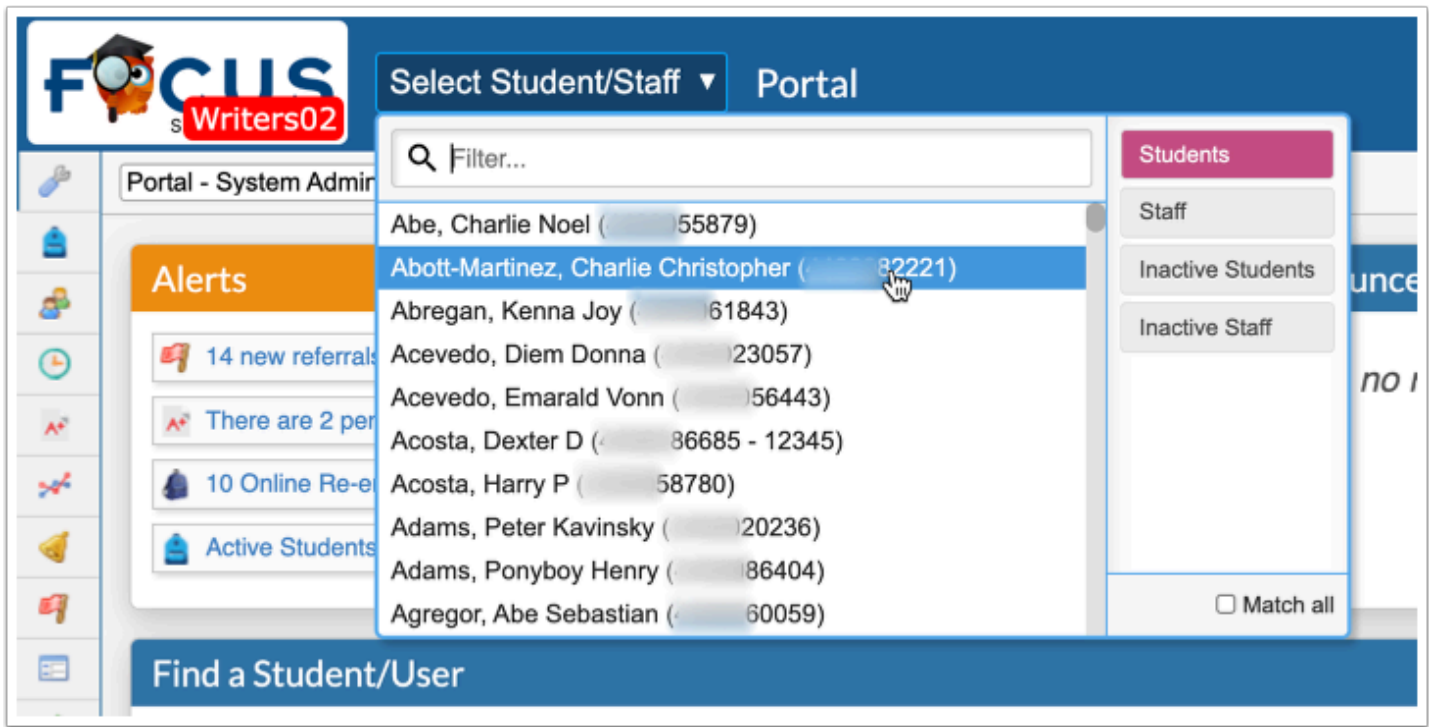
Or go to the **Students** menu and click **Student Info** to access the Student Search screen.
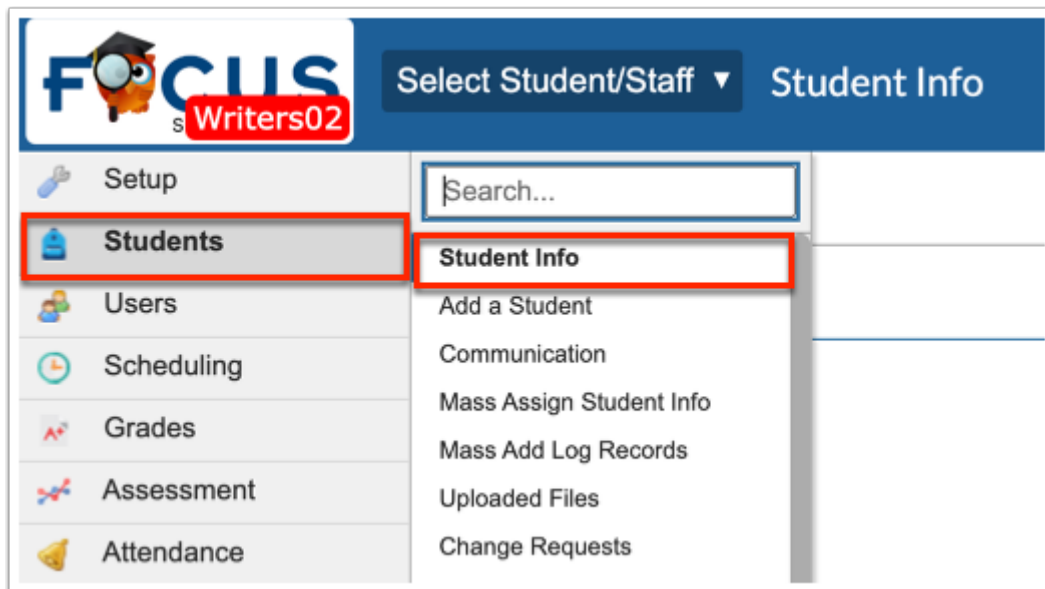
Or use the **Find a Student/User** search box on the Portal screen.

On the last two options, within the Search box, enter the student's name or ID number and click **Search**.

Updating Primary Addresses

1. Click on the **Addresses & Contacts** category on the left side of the screen to update or enter new information.

Each Address or Contact appears on its own Contact Card.

Icons may appear on an address card indicating Address Type and may appear on a contact indicating the "Contact Type" they have in relation to the student; see Icon Legend below:

Icon Legend

⭐ Blue star = Student's Primary Residential address

📍 Yellow pin drop = Maps the Address on Google Maps

✉️ Orange envelope = Different Mailing Address

🚚 Green Vehicle = Bus Pickup Address

🚚 Red Vehicle = Bus Drop Off Address

🔨 Pink Gavel = Contact has Custody

⚠️ Yellow triangle = Emergency Contact

📄 Red document = Note added to Contact

🚗 Green Car = Contact can pick up student

ℹ️ The orange envelope will only display if there is a mailing address that is DIFFERENT from the physical address on the selected address card.

⚠️ The student can only have ONE primary address. Enabling the Primary Residence slider on a different address card changes the student's primary physical address.

Hover your computer mouse over **Contacts at this Address** to view additional information about that contact.
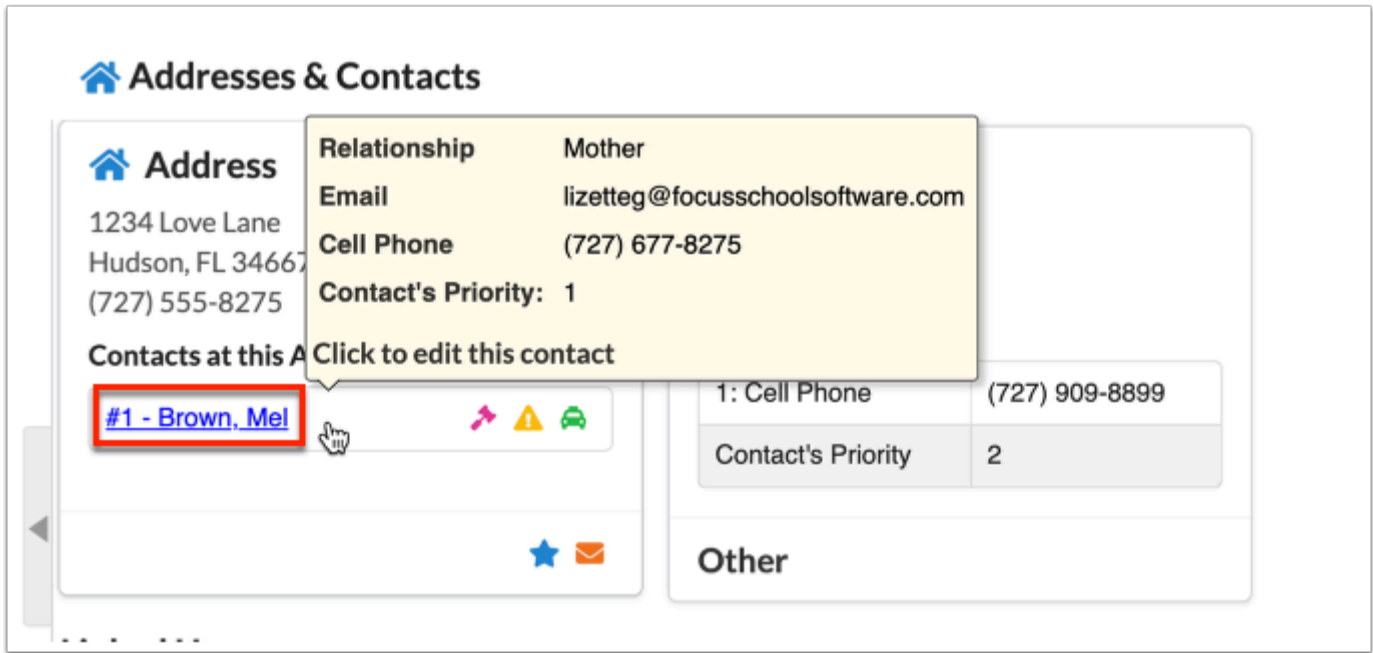
2. Click into the student's Address card to edit the address information.
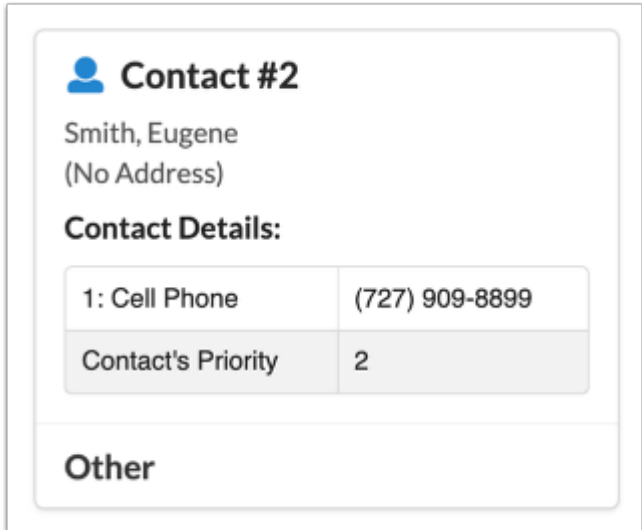
A pop-up window displays to allow editing the address fields.

3. Use the sliders to indicate:

- **Primary Residence**: Should be indicated for the student's primary address.
- **Mailing Address**: Should ALWAYS be turned on.
    - Leave the Mailing Address blank, if it does not differ from the Primary Residence.
    - Enter the Mailing Address if it does differ from the Primary Residence.

- **Bus Pickup** & **Bus Dropoff**: Should only be selected for students who are picked up or dropped off at this physical address. These options may not be enabled on the district's site.

> ℹ️ Always have the Primary Address and the Mailing Address toggles enabled for the student's physical address when they are the same so that when Advanced Reports, Print Letters, and/or District reports are run, the correct address gets pulled.

> ❗ If Address Validation is NOT being used, skip the next section and click the **Save** button.

4. Click the green **Save** button.

Validating Addresses

> If the district is using the Address Catalog to validate students' addresses against their Zoned Schools, a blue **Validate Address** button will display in the Address Block below the phone number field and should be clicked before saving the updated address.

1. Click **Validate Address**.

If the address is valid, then a list of the student's Zoned Schools displays.

a. If the address is not zoned for the school or found in the Address Catalog, select an **Override Reason**.

b. Click the **Override** button.

2. Click the green **Save** button.

Editing Existing Contacts

> Information for existing contacts can easily be updated.

1. Click on the name for the Contact that needs to be edited.

2. Edit the info fields applicable for the selected contact.

Any NOTES entered on a contact's card will be visible to the student & parent(s) if they have view access.

⊘ When adding a new or editing an existing contact, the relationship and contact type fields are required.

3. Edit the contact's Phone & Contact Details:

a. Detail Priority: Click the **-** or **+** signs to adjust the Contact's Priority. A contact's Priority Status determines whether the contact is considered the primary contact, secondary contact and so on. If a contact's Priority Status is not defined, Focus will calculate the priority based on the number of saved contacts.
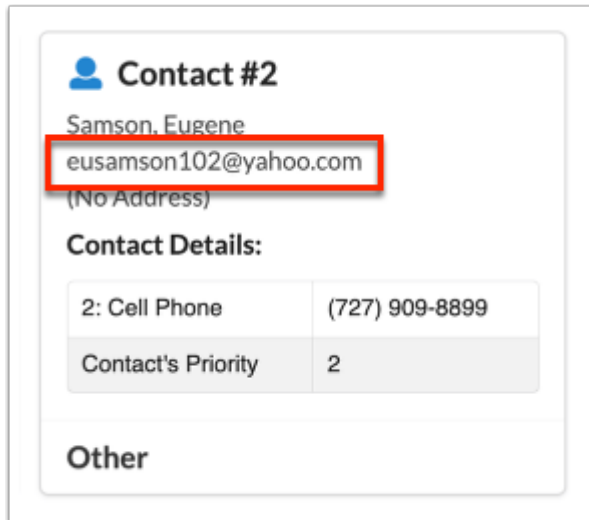

Phone Number Legend

• **Unlisted**: If checked means the phone number is unlisted.
• **Callout**: If checked means the phone number can be called.
• **Blocked**: If checked means the contact has blocked the school/district's number.

- **Texting (SMS)**: If checked text messages will be sent to this phone number.
- **Unsubscribe**: If checked, the contact has unsubscribed from receiving callout messages.

4. Click the green **Save** button in the bottom right of the screen.

The Address card displays all fields and any edits that have been made to the contact's status or details.

Deleting Existing Contacts

Parents may request that an existing contact, either at the primary address or attached to a different/no address, be removed from the student's record.

1. Click on the name of the Contact that needs to be removed.

2. In the pop-up window, click **Delete** in the bottom left corner of the screen.

3. Click **Confirm** to complete the removal.

Phone & Contact Details: Enter phone number(s) and other details for this contact. Multiple entries can be saved by pressing the ENTER key on your computer.

Export 📊 🖨️   Filter: OFF

Contact Type ⬍	Phone Number / Value ⬍	Detail Priority ⬍	Options
▼		─ ✚	
Cell Phone ▼	(555) 555-4178	─ 1 ✚	☐ Unlisted ☑ Callout ☐ Blocked ☐ SMS ☐ UNSUBSCRIBE

Contact Address Click to move this contact to a different address

234 Main Street
Ojqxwikxw, UZ 11111
⭐ ✉️

No Address ✖️

Confirm   Are you sure you want to delete this contact? ▪   Cancel or Save

Adding New Addresses

Existing contacts may not have an address card and new contacts can be added without an address card. Those contacts can be linked to an address different from the student's primary address after they have been added to the student's record.

1. Click **New Address** in the upper right corner of the Address & Contacts screen.

2. Enter in the Physical Address and Mailing Address (if applicable); **DO NOT** use the Options toggle to indicate if the address is a <u>Primary Address</u> as this will **CHANGE** the student's <u>physical address</u>.

3. Enter in the Phone Number for this address (if applicable).

Phone Number

Phone Number

☐ Unlisted   ☐ Callout   ☐ Blocked

4. Click the green **Save** button.

The new address will appear as an Address Card on the Address & Contacts screen.

🏠 **Addresses & Contacts**

🏠 **Address**   📍

1234 Love Lane
St. Petersburg, FL 33701
(727) 555-8275
Contacts at this Address

#1 - Brown, Mel   🔧 ⚠️ 🚗

                              ⭐ ✉️

🏠 **Address**   📍

123 Central Ave
St. Petersburg, FL 33701

👤 **Contact #2**

Samson, Eugene
eusamson102@yahoo.com
(No Address)
Contact Details:

1: Cell Phone	(727) 909-8899
Contact's Priority	2

Other

Adding New Contacts

New contacts can be entered without linking to an address; otherwise, addresses are created first and then contacts are linked to the address.

1. Click **New Contact** in the upper right corner of the Address & Contacts screen.

A pop-up window displays where the new contact's information can be entered.

2. Enter in the contact's Name, indicate their Relationship to the student and indicate if the contact has Custody, is an Emergency Contact or is able to Pick Up the student, enter in the contact's Email Address if applicable and add any Notes about this contact.

3. Add the contact's phone number if applicable.

> ⚠ When adding or editing a student contact, the relationship and contact type is required.

4. Select the correct address for the contact. If the address is not listed, it will need to be created and then selected. If the contact does not have an address, select the **No Address** block.

A confirmation alert displays at the TOP of the screen.

5. Click **Confirm**.

The confirmation will show a green check mark.

6. Click **Save**. The New Contact will now display on the Address & Contacts screen.

Activity

Update the Student's Addresses & Contacts for these scenarios:

- Parent sends note/calls/comes to school with documentation that they have moved. Update the student's address --NOT IN PRODUCTION! --
- Parent sends note adding her mother as an Emergency Contact with permission to pick up the student, but does not include an address.

Linked Users

> The Linked Users logging field is used to link parent users to their student so that they can view their student's information in their Parent Portal.

1. Select the **User** to link to the students or use the Filter box and type in the parent's name; a list of parent users matching the criteria will display; select the student's parent.

2. From the **Contact** pull-down, select the Contact of the User (if they exist) otherwise leave this column blank (looks at the contacts on the student's primary address card).

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3. Click **Log In As** to log in as the User (this is based on Profile Permissions).

4. Click **View User Info** to open the User's Info screen in a new tab.

5. Uncheck the **Enabled** check box to disable a user's access to the Student's Information on the Parent Portal.

6. Select the red minus sign to remove the **Linked User**.

7. Export this list of Linked Users to an Excel Spread Sheet or Print this list as a PDF.

Linked Students

The Linked Students logging field is used to define relationships between students, including siblings and parent/child relationships.

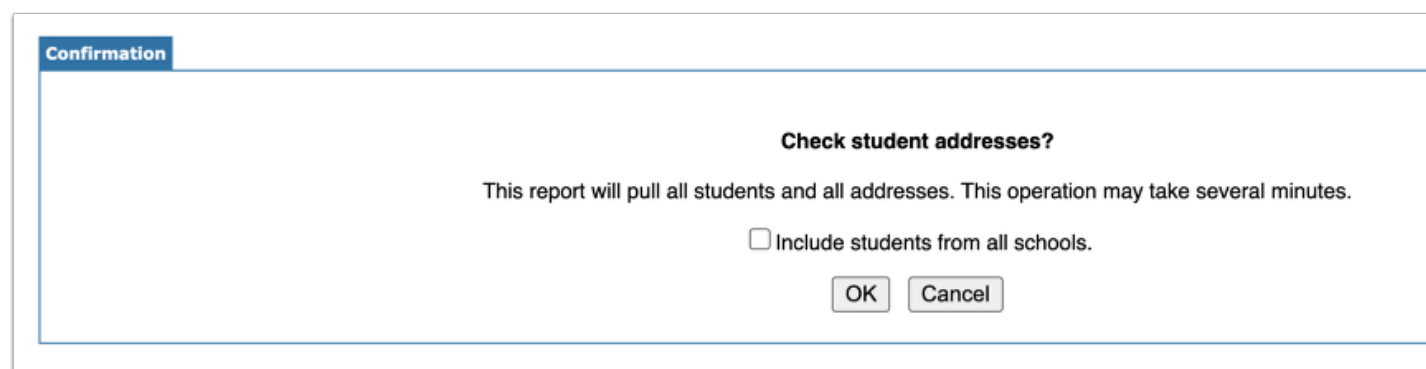**1.** Select the applicable **Student** from the pull-down.

2. From the **Relationship** pull-down, indicate if this **Linked Student** is a Sibling, Step-Sibling, Parent, Cousin or Child of the Student.

3. Select the red minus sign to remove the **Linked Student**.

4. Export this list of Linked Students to an Excel Spread Sheet or Print this list as a PDF.

Invalid Address Report

The Invalid Address report is used to verify that students' addresses are within the district, and/or the school zone where the student is enrolled.

ℹ The district's Address Catalog must be setup and parsed, and the System Preference, Use the Address Catalog for address validation, must be enabled in order to run this report.

1. Go to the **Students** menu and click **Invalid Address Report**.

   a. A message displays confirming the run of this report with an option to **Include students from all schools**; leave this unchecked to run just for the displayed school.

Confirmation

Check student addresses?

This report will pull all students and all addresses. This operation may take several minutes.

☐ Include students from all schools.

OK   Cancel

2. Click **OK** to run the report.

By default, the Invalid Addresses tab will be selected.

Any students that appear on this list indicate that their Address is not part of the Address Catalog.

Use the filter fields to filter to a specific student.

3. Click on a student's **Full Name** to go to the **Student Info** screen for the selected student.

    a. View and/or update the student's address on the **Address & Contacts** screen.

4. Continue this process for all students if applicable.

5. Select the **Zoning Issues** tab to display any students whose address is included in the district's Address Catalog, but does not match the **Zoned Schools** in the Address Catalog as per the students' enrollment records.

6. Click on a student's **Full Name** to go to the **Student Info** screen for the selected student.

    a. Update the students address on the **Address & Contacts** screen. Continue this process for all students as applicable.