



Appleton Area School District
Training Document
Image Version: RR7A
OS/Office: Windows 7/Office2016

Title: IC – Relationships and Contact Information Updates
Date: 06/01/2018
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REMINDER: Parents MAY update this information through the portal but are not required to.

1. There are two places to make sure information is up to date in relation to contact preferences. In the individual's demographic tab **and** in the student's relationship tab.
 - a. Find the individual record in Census > People > Demographic tab.

JONES, TEST Nickname: JOHNNY HEALTH DOCUMENTS Approaching Attendance Concern A
Grade: 08 #600388 DOB: 01/01/2006 Gender: F

Demographics Identities Households Relationships Enrollments District Employment

Save Delete Person Summary Report Demographics Data

Personal Contact Information		Messenger Preferences Contact Reasons						
Contact Information	Private	Device	Emergency	Attendance	Behavior	General	Priority	Teacher
Email:	<input type="checkbox"/>	Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Secondary Email:	<input type="checkbox"/>	Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
*EISENSCHINK Household: (920).....	<input type="checkbox"/>	Voice	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Text	<input type="checkbox"/>	Text	<input type="checkbox"/>	<input type="checkbox"/>				
*testing Household: (920)997-1399	<input type="checkbox"/>	Voice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Text	<input type="checkbox"/>	Text	<input type="checkbox"/>	<input type="checkbox"/>				
Cell Phone: () - x	<input type="checkbox"/>	Voice	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Text	<input type="checkbox"/>	Text	<input type="checkbox"/>	<input type="checkbox"/>				
Other Phone: () - x	<input type="checkbox"/>	Voice	<input type="checkbox"/>	<input type="checkbox"/>				
Text	<input type="checkbox"/>	Text	<input type="checkbox"/>	<input type="checkbox"/>				
Work Phone: () - x	<input type="checkbox"/>	Voice	<input type="checkbox"/>	<input type="checkbox"/>				
Text	<input type="checkbox"/>	Text	<input type="checkbox"/>	<input type="checkbox"/>				
Pager: () - x	<input type="checkbox"/>							

* Household phone preferences apply to all active members of this household.

Preferred Language
en_US: US English

Comments

- Modified by: ADMINISTRATOR, SYSTEM 10/27/2017 14:32

- b. Enter relevant email and phone number information. You can overwrite/delete any information that is no longer current.
2. In the person's relationship tab Relationship tab, review and update all contact preferences.

Demographics Identities Households **Relationships** Enrollments District Employment District Assignments

Save New Non-Household Relationship

Relationships within the EISENSCHINK **Primary Household Relationships											
Name	Gender	Relationship	Start Date	End Date	Emergency	Priority	Guardian	Mailing	Portal	Messenger	Private
EISENSCHINK, AMBER L	F	MOTHER for district message purposes - do not remove			1		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
EISENSCHINK, AMBER TEST	F	MOTHER	03/05/2018		3		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
STREUBEL, LYNN M	F	CAREGIVER for district message purposes - do not remove					<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
TESTING, MOM	F	MOTHER			1		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Field	Description
Relationship	Designates the type of relationship between two people. Both people - the selected individual and the name of the person in the row - are affected by the selected.
Start Date	Date on which the relationship started. <p>This date is not required to save a relationship. But, if a relationship is removed due to a clerical error, and the start date is not removed, a blank entry displays on the student's Summary tab. If a relationship ends (emergency contact changes, etc.), an end date should be entered rather than removing the assigned relationship type.</p> <p>In the case where the relationship ends but the person should still display on the reports and summary information, create a Not Applicable or Undefined Relationship Type.</p>
End Date	Date on which the relationship ceased to apply. An End Date does not delete a relationship, just ends it.
Emergency Priority	Provides a visual indication of the listed person's priority for contact in an emergency situation. This is a numeric value. The person that should be notified first should have a 1. If there is no entered priority, the school uses discretion when contacting individuals. <p>Messaging tools do not use this tool when sending mass emails or voice messages.</p>
Guardian	When checked, indicates which person has authority when making decisions on behalf of the student. This designation is used in several reports and messaging tools.
Mailing	When marked, indicates that person will receive addressed reports to his/her attention.
Portal	This checkbox should be marked if the listed person should have access to the Portal information of the person currently being viewed.
Messenger	This checkbox should be marked if the listed person is considered a messenger contact for the person currently being viewed. If marked, the listed person will receive phone, email, process inbox and/or Portal inbox notifications regarding the person currently being viewed.
Private	Indicates the details should be kept within school settings. Marking this checkbox does not remove the information from reports.

Notes about Guardianship

- This will be primarily updated at the school sites. Not by IT or A&E.
- Different than caregiver agreement, does not require any regular updating.
- Parents **are** guardians **unless** legal document says otherwise
- People other than parents **are not** guardians **unless** legal document states otherwise. This includes step-parents, foster parents, social workers, and case workers.