Family- How do I add a contact from the admin side?

Last Modified on 05/10/2018 1:28 pm EDT

To add, edit or deactivate contacts for children/families- go to a family record, then select the child tab.

On the child tab select the More option, then select Contacts.

To add a new contact enter the contact's details in the blank fields then press Save. The available fields are listed below-

- Contact Type- this section helps to classify what type of contact is being entered, this is a required field (options cannot be removed from the selection list)
  - Emergency Release
  - First Release
  - Doctor
  - Dentist
  - DO NOT Release

Contact Type

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Emergency Release

First Release

Release

Doctor

Dentist

DO NOT Release

Last Name

👤

No

er

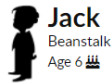☐ Disable Pin

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Address

- First Name
- Last Name
- Relationship- the values here will populate based on the Relationship type valid values that are setup under Setup > System Config, Valid Values
- Active
  - Can be Released? check this box if the contact can pick up the child
- Release Limitations/Notes
- Payer- if the contact can pay on the account or not, if this is marked as yes, then a username and password will display once the contact is saved. If yes is selected an email is required.

- Yes
- No
- PIN Number- the contact's PIN number will display once the contact is saved
  - Disable PIN
- Drivers License
- Address
- Address 2
- City
- State
- Zip
- Home Phone
- Work Phone
- Cell Phone
- Email
- Picture

Jack
Beanstalk
Age 6

Add Sibling

Admission/Personal | Doctor/Health | Program/Room Assignment | Calendar View | **More ▾**

☰ Contacts

Add New Contact

Last Name	First Name	Type	Home Phone	Cell Phone	Work Phone	Email	Payer	Last Changed

Contact Information

Contact Type
🏛 | -- ▾

First Name
👤

Last Name
👤

Relationship
🏛 | ▾

Active?
❓ | Yes ▾

☐ Can be released?

Release Limitations/Notes
💬

Payer Information

Payer?
❓ | No ▾

Check In/Out

Pin Number
➜|

☐ Disable Pin

Personal Information

Drivers License
🪪

Address
📍

Address 2
📍

City
📍

State
📍 | -- ▾

Zip
📍

Home Phone
📍

Work Phone
📞

Cell Phone
📞

Email
✉

Picture
browse | ⬇

☑ Save