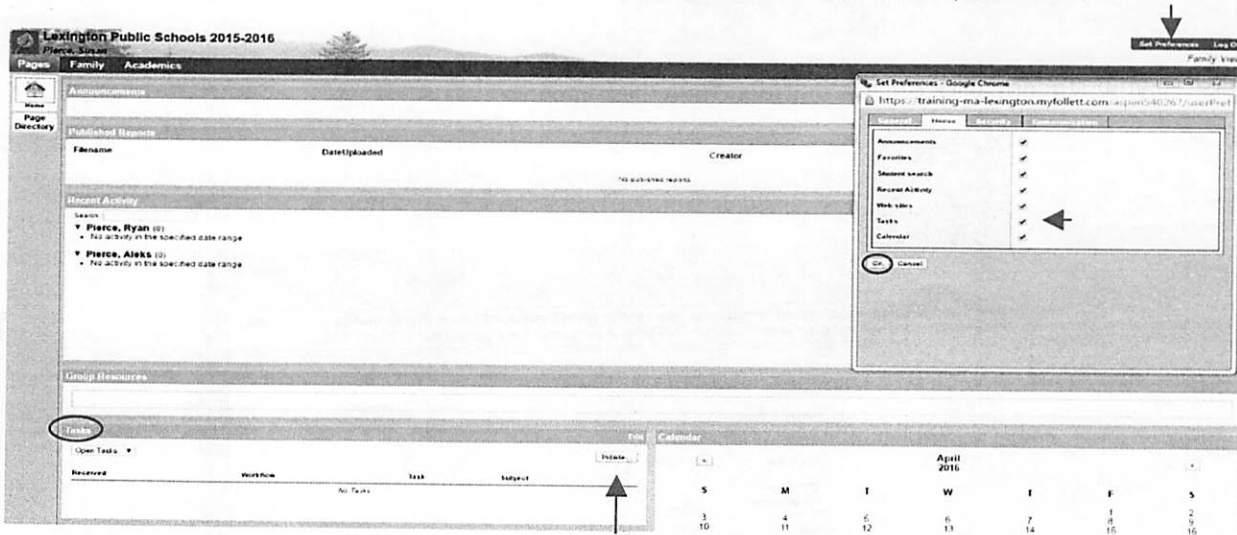


## Updating Contact Information via the Family Portal

There is a function in the Family Portal to allow parents/guardians to update contact information electronically. The instructions to do this are provided in this document. Please note that when you report contact changes electronically, you will not see it recorded immediately in the family portal. Changes will be reviewed by school personnel and then posted to the student record.

This function can be found on the Pages tab of the family portal screen in a section called 'Tasks'. You will need to enable from your *Set Preferences* menu.

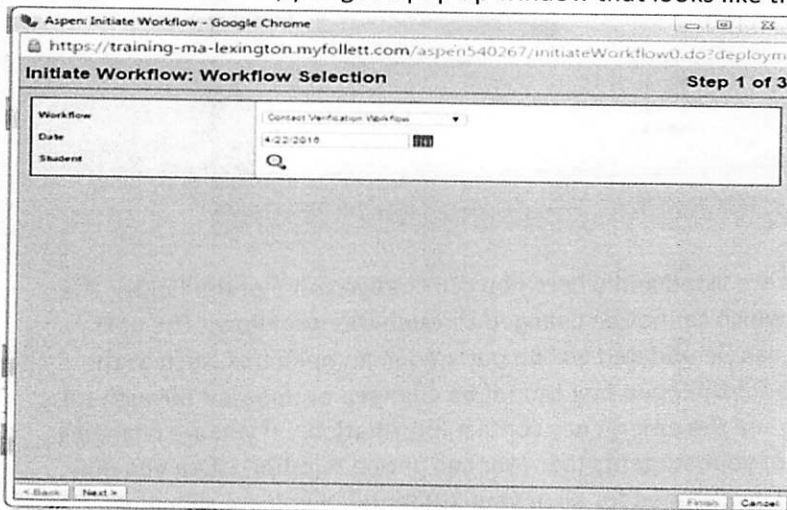
Select '*Set Preferences*' on the upper right hand side of your family portal screen. When the '*Set Preferences*' window opens up, click the 'Home' tab and then click the checkbox next to 'Tasks'. Then, click 'OK'.




Now, the Task section has been added.

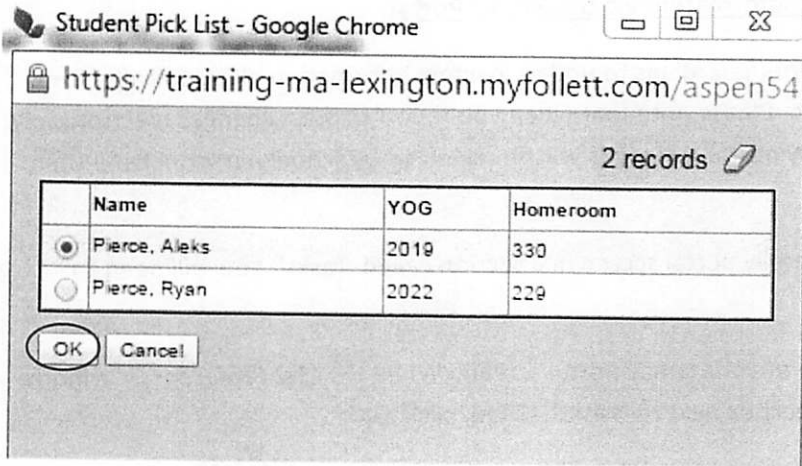
To change contact information, click the 'Initiate' button.

After you click 'Initiate', you get a pop up window that looks like this:



There are 3 steps to this process.

1. In the field that says 'Workflow', click the down arrow button to select 'Contact Verification Workflow'. Next, click the magnifying glass  next to 'Student' to select your student. Another box appears with your student's names. Choose the student you are updating.



After you have selected your student, click the 'OK' button. Then Click 'next'.

Aspen: Initiate Workflow - Google Chrome

https://training-ma-lexington.myfollett.com/asp540267/initiateWorkflow1.do?validWizard=true

Initiate Workflow: Details Step 2 of 3

Contact Verification Workflow Details for Pierce, Aleks

Student Contact Verification Form: Your current 'Parent/Guardian' and 'Emergency' contact information is listed in the spaces indicated below. Please update any incorrect information or add any new information. Also, please note that your changes will not display in the portal until school personnel have posted them. Thank You.

**Student Information:**

Name:	Pierce, Aleks	Homeroom:	
Address 1:	4 Pivnet Dr	Homeroom teacher:	
Address 2:		Grade level:	09
Address 3:	Lexington, MA 02420	Date of birth:	3/14/2001
Dean:		Gender:	M
Counselor:		DOE 24 Primary Language:	English
		Race:	Asian

**Parent/Guardian Contacts:**  
Phone numbers and email addresses can be updated.

First Name:	Susan	First Name:	Ron
Last Name:	Pierce	Last Name:	Pierce
Address:	4 Pivnet Dr	Address:	4 Pivnet Dr
Address:	Lexington, MA 02420	Address:	Lexington, MA 02420
Home Phone:	<input type="text" value="781-123-4567"/>	Home Phone:	<input type="text" value="781-557-9910"/>
Cell Phone:	<input type="text" value="917-123-4567"/>	Cell Phone:	<input type="text" value="517-557-9910"/>
Work Phone:	<input type="text" value="508-123-4567"/>	Work Phone:	<input type="text" value="508-557-9910"/>
Email:	<input type="text" value="spierce@aol.com"/>	Email:	<input type="text" value="rpierce@aol.com"/>
Custodial Parent/Guardian:	Y	Custodial Parent/Guardian:	Y

**Emergency Contacts:**

< Back Next > Finish Cancel

- This is the screen where your student's contacts are listed and where you can change some of the fields. The top section of the screen is student information which cannot be changed through this workflow. The next sections are for contact information. Fields that can be updated will be outlined in an open box, such as the email address field. Fields that are displayed without the open box cannot be changed or updated through this workflow. Continue to scroll through the form to see the emergency contact information. If you are changing contact information that will be the same for all of your students (i.e. your cell phone number), then you only need to change it once for one student and it will be changed for all of your students. If you are changing something specific to the student (i.e. their doctor's name), then you need to change it for each student.

Emergency Contacts:			
Please list emergency contacts who may take responsibility for and transport my child if the school cannot contact parents/guardians			
First Name :	Noah	First Name :	Mary
Last Name :	Smith	Last Name :	White
Home Phone :	781-425-0352	Home Phone :	978-458-0018
Cell Phone :	917-252-5813	Cell Phone :	917-129-1852
Work Phone :		Work Phone :	
Email :	nsmith@aol.com		
Medical Information			
Family Physician		Family Dentist	
First Name :	David	First Name :	Lexington
Last Name :	Murphy	Last Name :	Dental Associates
Home Phone :	781-592-9929	Home Phone :	781-992-9353
Insurance Company/Carrier :	Aetna		
<input type="button" value="Back"/> <input type="button" value="Next"/>		<input type="button" value="Finish"/> <input type="button" value="Cancel"/>	

Once you are done editing or adding contact information, click the 'Next' button.

- To complete the workflow click the 'Finish' button. The school will be notified that you have edited contact information for the student you selected on step 1.

If you have any questions, please email the parent portal at: [parentportal@sch.ci.lexington.ma.us](mailto:parentportal@sch.ci.lexington.ma.us)