



WISEstaff

# Updating Contact Information



January 2016



This 2 minute video will walk you through the process of updating your contact information in WISEstaff.

# WISEstaff



- It is important to have up-to-date contact information in WISEstaff for your agency/district
- Click on Update contact info in the Admin menu



To update contact information in WISEstaff begin by clicking on the Update Contact Info link under the Admin Menu

# WISEstaff

WISEstaff / Update contact info

For WISEstaff agency administrators to update contact information for WISEstaff system contact information for System Primary, System Secondary, Homeless Liaison, and General Contacts.

Agency:

Contact Verified:

Type	First	Middle	Last	Suffix	Phone	Ext.	Email	
Primary - Responsible for completing Staff data	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="button" value="edit"/> <input type="button" value="delete"/>
Secondary - Responsible for verifying Staff data	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="button" value="edit"/> <input type="button" value="delete"/>
Generic Contact	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="button" value="edit"/> <input type="button" value="delete"/>



The information displayed on this screen allows you to edit your own contact information as well as view other agency/district contact information. To change agency/district, utilize the agency drop down menu.

# WISEstaff Contact Roles

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Agency:

Contact Verified:

Type	First	Middle	Last	Suffix	Phone	Ext.	Email	
Primary - Responsible for completing Staff data	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="button" value="edit"/> <input type="button" value="delete"/>
Secondary - Responsible for verifying Staff data	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="button" value="edit"/> <input type="button" value="delete"/>
Generic Contact	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="button" value="edit"/> <input type="button" value="delete"/>

Primary - Responsible for completing Staff data

Primary - Responsible for completing Staff data

Secondary - Responsible for verifying Staff data

Homeless Liaison

Generic Contact



When looking at your agency/district contacts, the information displayed could be a combination of the following roles: Primary - responsible for completing staff data, Secondary - responsible for verifying staff data, homeless liaison and generic contact.

# Edit a Contact

WISEstaff / Update contact info

For WISEstaff agency administrators to update contact information for WISEstaff system contact information for System Primary, System Secondary, Homeless Liaison, and General Contacts.

Agency:

Contact Verified:

[+ Add Contact](#)

Type	First	Middle	Last	Suffix	Phone	Ext.	Email	
Primary - Responsible for completing Staff data	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="checkbox"/> <input type="checkbox"/>
Secondary - Responsible for verifying Staff data	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="checkbox"/> <input type="checkbox"/>
Generic Contact	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="checkbox"/> <input type="checkbox"/>



To edit an existing contact, simply click on the edit icon, which is the icon on the left.

# Edit Mode

WISEstaff / Contacts / Edit Contact

Contact Type	<input type="text" value="Primary - Responsible for completing Staff data"/>	
First Name	<input type="text"/>	
Middle Name	<input type="text"/>	
Last Name	<input type="text"/>	
Suffix	<input type="text" value="None"/>	
Email	<input type="text"/>	
Phone + Ext.	<input type="text"/>	<input type="text"/>
Fax + Ext.	<input type="text"/>	<input type="text"/>
	<input type="button" value="Save"/>	<input type="button" value="Cancel"/>



Once in edit mode, you have the ability to switch the contact type as well as update demographic information. Click Save to save any changes.

# Delete a Contact

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Agency:

Contact Verified:

Type	First	Middle	Last	Suffix	Phone	Ext.	Email	
Primary - Responsible for completing Staff data	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="button" value="✕"/>
Secondary - Responsible for verifying Staff data	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="button" value="✕"/>
Generic Contact	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="button" value="✕"/>



To delete an existing contact, simply click on the red X icon, which is icon on the right.

# Add Contact

WISEstaff / Update contact info

For WISEstaff agency administrators to update contact information for WISEstaff system contact information for System Primary, System Secondary, Homeless Liaison, and General Contacts.

Agency:

Contact Verified:

Type	First	Middle	Last	Suffix	Phone	Ext.	Email	
Primary - Responsible for completing Staff data	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="button" value="edit"/> <input type="button" value="delete"/>
Secondary - Responsible for verifying Staff data	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="button" value="edit"/> <input type="button" value="delete"/>
Generic Contact	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="button" value="edit"/> <input type="button" value="delete"/>



To add a contact to your agency/district click on the Add Contact button which appears above the contacts for your district.

# Add Contact

WISEstaff / Contacts / Create Contact

Contact Type	<input type="text" value="Primary - Responsible for completing Staff data"/>	
First Name	<input type="text" value="Secondary - Responsible for verifying Staff data"/>	
Middle Name	<input type="text" value="Homeless Liaison"/>	
Last Name	<input type="text" value="Generic Contact"/>	
Suffix	<input type="text" value="None"/>	
Email	<input type="text"/>	
Phone + Ext.	<input type="text"/>	<input type="text"/>
Fax + Ext.	<input type="text"/>	<input type="text"/>
	<input type="button" value="Save"/>	<input type="button" value="Cancel"/>



Choose a contact type and then complete the demographic information. Click save to add to the new contact.



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# Updating Contact Information



Thank you for watching this video on updating your contact information in WISEstaff.