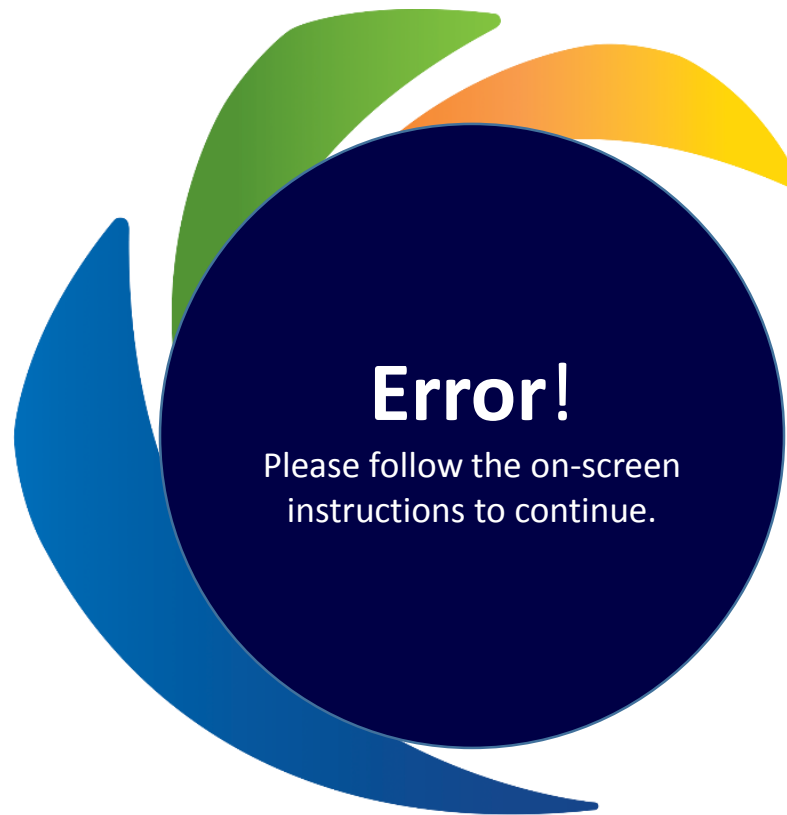




[Click to Begin](#)



# Error!

Please follow the on-screen  
instructions to continue.

Go Back



[Restart Course](#)

# Before We Continue . .

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## *Please Note Common Policies and Procedures*

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### Creating Accounts

Our client's data is important to us. More importantly, it is important to us. To reduce the risk of identity theft, and to avoid unwanted duplication of accounts, only clients should create accounts by visiting [CarlsbadConnect.org](https://CarlsbadConnect.org).

### Managing Families

Families are a way that we keep our client's account information together. If a parent/spouse already has a primary account, you may add family members by first searching the system to verify their existing account. After verifying the account, you may add the new family member to the system. Only create a new customer upon valid verification (proof of same address/ last name).

For divorced parents, add the child to the account with the parent with primary custody. A child can be tagged on both families; however.

### Merging Accounts

Some clients may have accidentally created multiple accounts. In order to merge accounts without loss of data, only Administrative Personnel may merge accounts.

Please send an email to [ActiveNetHelp@CarlsbadCa.gov](mailto:ActiveNetHelp@CarlsbadCa.gov) with the first name of the client, the account numbers associated with the client, the primary account used and if any discrepancies between accounts, which is the correct information.

### Modifying Accounts

Some fields within an account should not be changed often. Birthdays and Genders are examples of those that people may wish to alter to register in particular programs. To avoid misinformation, when you alter an account, in the note section, please input what was changed, the date, and your ActiveNet user name. An example is shown later in this course.

A photograph of a large blue and white sign that reads "CARLSBAD" in bold, capital letters. The sign is set against a background of palm trees and a clear sky.

Finish