



Before We Continue...

Please Note Common Policies and Procedures

Creating Accounts

Our client's data is important to us. More importantly, it is important to them. To reduce risk of identity theft and to avoid unwanted duplication of accounts, only clients should create accounts by visiting www.CarlsbadConnect.Org

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 provide Admin staff the First and Last 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.

Managing Families

Families are a way that we keep our client's information together. If a parent/spouse already has a primary account, you may add family members by first searching the system to see if they have an existing account. If they don't, 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.

Editing Accounts

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