Just-in-Time Instructions for: Review & Update Contact Information

ERA 2.0 automatically associates the user who creates the form with the form that is generated. It also assigns the associated user as the Primary Contact for the records schedule. Review the auto-populated contact information for your user profile. To update the system-generated contact information, follow your Agency guidance on updating user profiles in ERA 2.0.

If you are not the primary contact for the records schedule and you would like to add a primary contact, follow the steps below. You have the option of selecting from existing contacts or adding a new contact. To add a new contact, you will need the contact's first and last name, email, and phone number to complete the steps below.

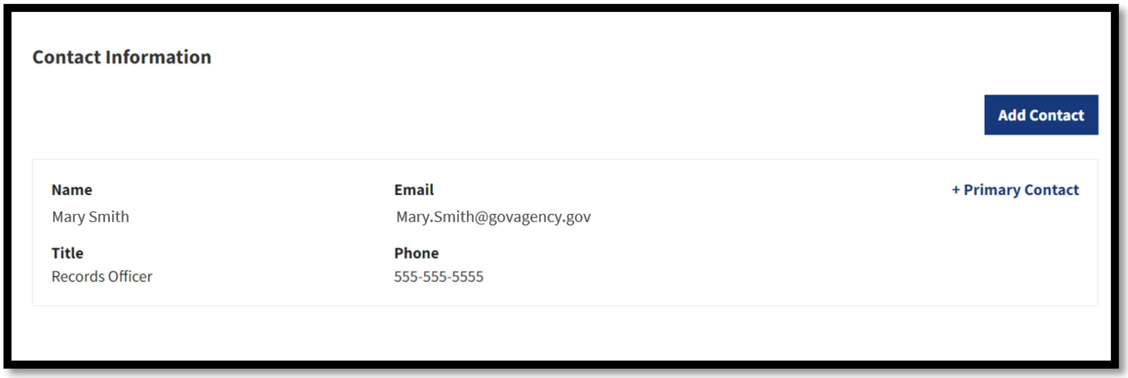

Figure 1: Contact Information Tab

Add a Primary Contact – Selecting an Existing Contact

1. Select **Add Contact**. The *Add Contact* dialog window displays. The Select Existing Contact tab displays by default.

2. Select the **button** next to the name of the person you would like to add as a contact. You may use the search filter that displays at the top of the window to narrow your results.

3. Reply **Yes** to: *Make this person the primary contact?*

4. Enter **comments** in the *Comments* field as appropriate.

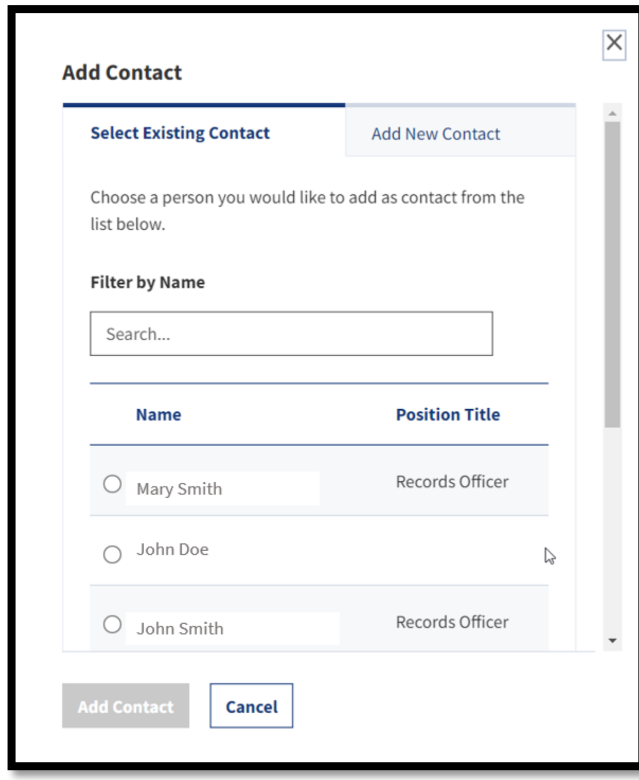

Figure 2: Select Existing Contact Menu

5. Select **Add Contact**. The Contact Information tabs displays the updated Primary Contact information.

6. Select **Next**. The Items tab displays.

If the contact is not selected as the Primary Contact during the adding process, you must delete the contact and add the person again.

Add a Primary Contact – Adding a New Contact

1. Select **Add Contact**. The *Add Contact* dialog window displays. The Select Existing Contact tab displays by default.

2. Select the **Add New Contact** tab. The Add New Contact tab displays.

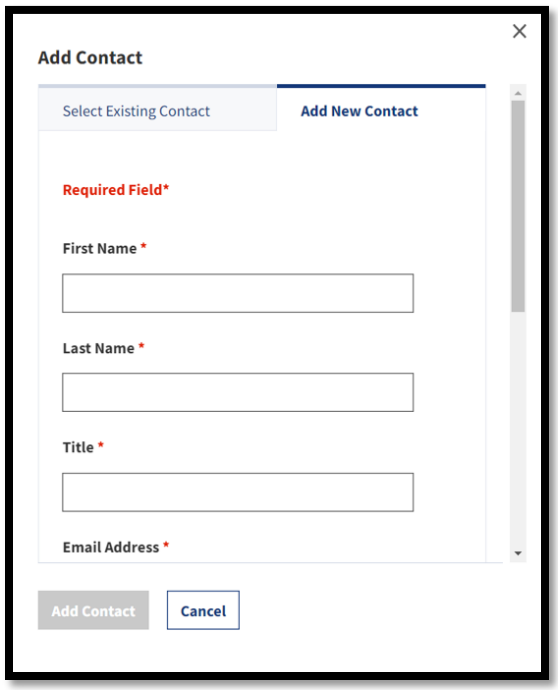

Figure 3: Add New Contact Menu

3. Enter the **contact's information** – i.e., First Name, Last Name, Title, Email Address, and Phone Number in the fields provided.

4. Reply **Yes** to: *Make this person the primary contact?*

5. Select **Add Contact**. The Contact Information tabs displays the updated Primary Contact information.

6. Select **Next**. The Items tab displays.

END.