



## How to Add and Update Institution Contact Information

Individuals assigned as the Unit Head or Security Delegate can add or update contact information in the Accreditation Data System (ADS).

Individuals who are registered and have an ADS account can update their own contact information in their profile page. For assistance with updating your own contact information, email [annualdatasystem@ctc.ca.gov](mailto:annualdatasystem@ctc.ca.gov).

- **Before adding a new staff record in the ADS, it is highly recommended that the Unit Head and Security Delegate confirm whether staff already has an ADS account or is currently in the system. This will prevent duplication of staff records in the ADS. A staff with an ADS account has registered and can log into the ADS. A staff currently in the system does not need to have an ADS account but may be listed as an institution contact.**
- **Staff who will not be using the ADS do not need to have an ADS account. For example, an institution may add the fiscal officer as an Accreditation Fee Contact, and that fiscal officer may never need to use the ADS. Thus, the fiscal officer does not need to create an ADS account. The Unit Head or Security Delegate will have access to add the fiscal officer as a contact only.**
- **When creating a new staff record, it is highly recommended that the email address included is specific to the staff, and will not be used by other staff members. An email should be linked and accessible to one person. For example, generic email addresses such as [frontoffice@ctc.ca.gov](mailto:frontoffice@ctc.ca.gov) is not recommended. The ADS is personalized for each registered ADS user.**

To add staff with an ADS account or is currently in the system, see section [A.1](#).

To add a new staff only as a contact and who will not be using the ADS, see section [A.2](#).

### Click the page number to navigate to a specific section

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**A. ADD NEW INSTITUTION CONTACT**

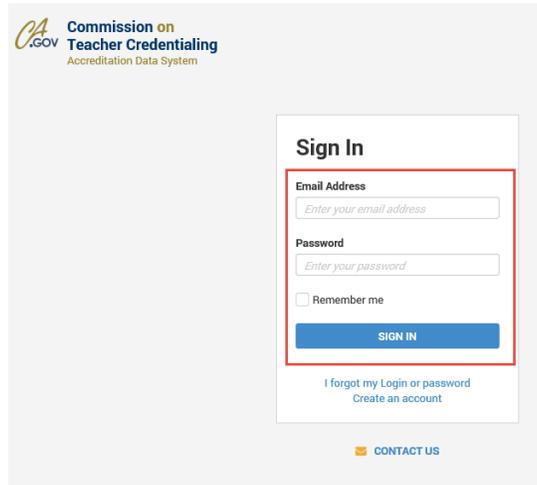
**A.1 STAFF WITH AN ADS ACCOUNT OR IS CURRENTLY IN THE SYSTEM**

**Only the Unit Head and Security Delegate can add contact information.**

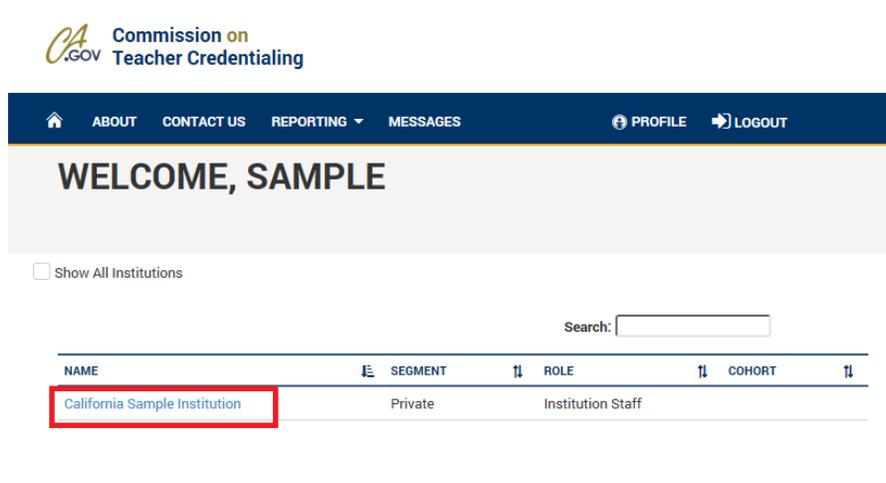
1) Navigate to

<https://edprepdata.ctc.ca.gov>

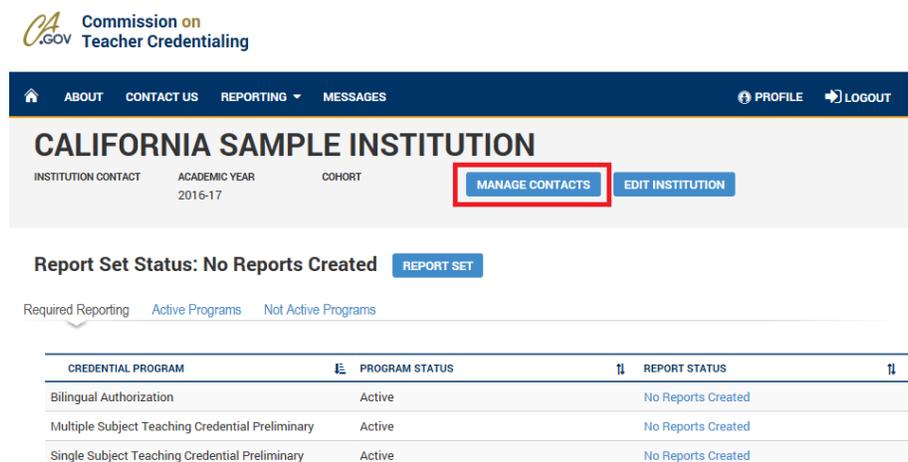
From the sign in screen, enter your email address and password, and click **SIGN IN**.



2) Click the institution name (hyperlinked in the **NAME** column).



3) Click **MANAGE CONTACTS** below the institution name.





4) On the Institution Contacts page, click the **ADD CONTACT TO INSTITUTION**.

Institution Contacts

Institution Name : California Sample Institution  
Contact Name :

Search:

ROLE	FIRST NAME	LAST NAME	EMAIL	ACTION
No data available in table				

Back  **ADD CONTACT TO INSTITUTION**

5) On the Add User page,

- click the **User Lookup** drop down menu, and select the staff's name and email address;
- select the **Institution Role** for the staff;
- enter the dates for which this staff has access to the institution (leave blank for non-expiring access);
- then, click **ADD USER**.

The staff with a role will be added on the Institution Contact page.

If your staff does not appear on the User Lookup drop down menu, send an email to the Commission [HERE](#). It is likely that the staff has created an account using a different email domain (i.e., gmail.com) and is not able to connect automatically to the institution.

### Add User

Institution Name: California Sample Institution

User Lookup:  1

Institution Role:  2

Valid From:  3

Valid To:  3

4



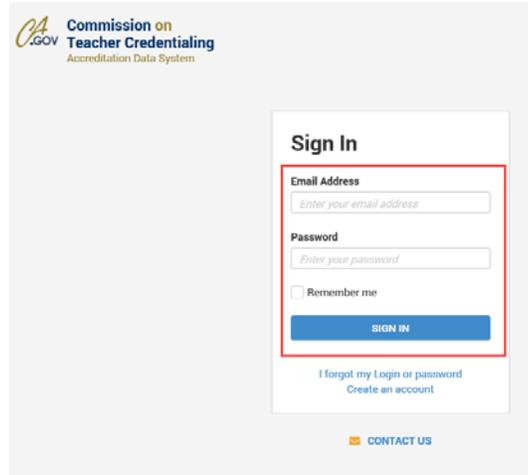
**A.2 STAFF WITHOUT AN ADS ACCOUNT AND IS NOT IN THE SYSTEM**

**Only the Unit Head and Security Delegate can add contact information.**

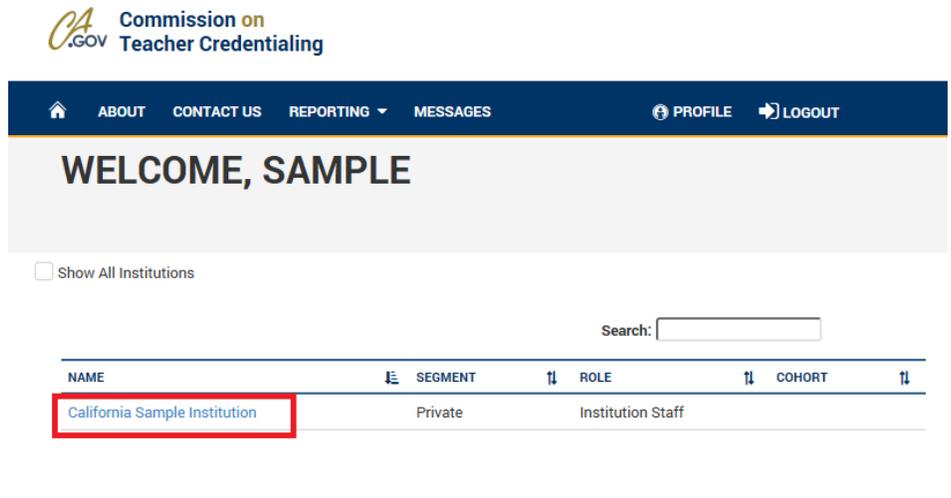
1) Navigate to

<https://edprepdata.ctc.ca.gov>

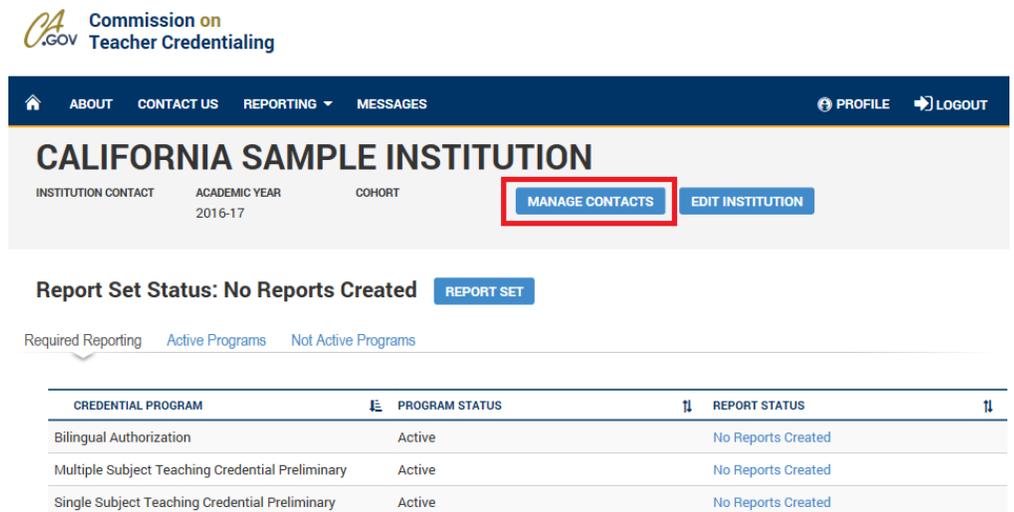
From the sign in screen, enter your email address and password, and click **SIGN IN**.



2) Click the institution name (hyperlinked in the **NAME** column).



3) Click **MANAGE CONTACTS** below the institution name.





4) On the Institution Contacts page, to ensure that staff does not exist in the ADS, click the **ADD CONTACT TO INSTITUTION**.

To prevent duplication of staff records, it is highly recommended that you confirm with your staff that he/she did not create an ADS account.

### Institution Contacts

Institution Name : California Sample Institution  
Contact Name :

Search:

ROLE	FIRST NAME	LAST NAME	EMAIL	ACTION
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No data available in table

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5) On the Add User page, click the **User Lookup** drop down menu to ensure that the staff you want to add is not listed.

Then click **CANCEL**.

If the user is listed on the **User Lookup** drop down menu, follow steps in section [A.1](#).

### Add User

Institution Name: California Sample Institution

User Lookup:

Institution Role:

Valid From:

Valid To:

[ADD USER](#) [CANCEL](#)



6) Back on the Institutions Contact page, click **CREATE CONTACT**.

### Institution Contacts

Institution Name : California Sample Institution  
Contact Name :

Search:

ROLE	FIRST NAME	LAST NAME	EMAIL	ACTION
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No data available in table

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7) On the Create Contact page, enter the staff's contact information. Then click **SUBMIT**.

### Create Contact

First Name

Last Name

Email  Both

Phone  Both

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**SUBMIT**

8) Back on the Institution Contact page, the staff record will be listed with "Staff" as the default role.

The staff's role cannot be edited. You can add a new record for the staff with the appropriate role (see section [A.1.](#)) and remove the record with the "Staff" role (see section [B.](#)).

### Institution Contacts

Institution Name : California Sample Institution  
Contact Name :

Search:

ROLE	FIRST NAME	LAST NAME	EMAIL	ACTION
Staff	Sample	Person	sample @ctc.ca.gov	<a href="#">ⓘ</a> <a href="#">✎</a>

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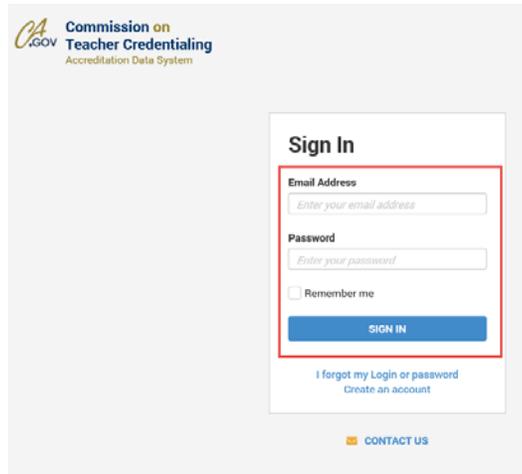
**B. UPDATE INSTITUTION CONTACT INFORMATION**

Only the Unit Head and Security Delegate can update contact information.

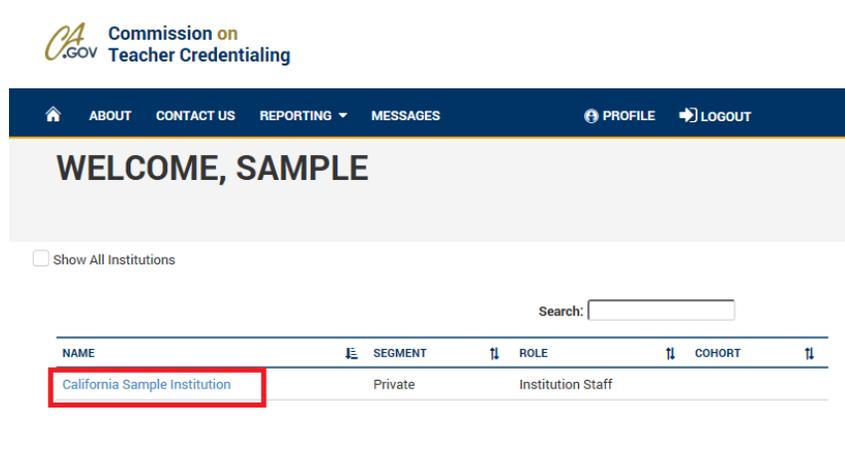
1) Navigate to

<https://edprepdata.ctc.ca.gov>

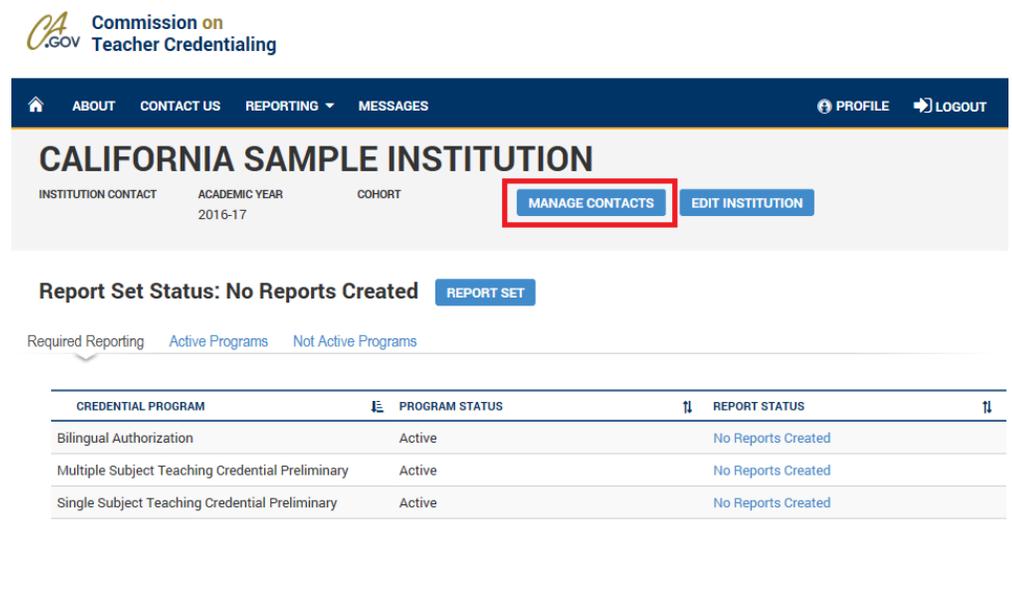
From the sign in screen, enter your email address and password, and click **SIGN IN**.



2) Click the institution name (hyperlinked in the **NAME** column).



3) Click **MANAGE CONTACTS** below the institution name.





4) The ADS only allows editing of the staff's contact information such as the email address.

The staff's role cannot be edited. You must delete the staff record with the incorrect role and add a new record with the correct role.

To edit contact information for a staff, click the  button below the ACTION column.

### Institution Contacts

Institution Name : California Sample Institution  
Contact Name : Sample2 Person2

Search:

ROLE	FIRST NAME	LAST NAME	EMAIL	ACTION
Accreditation Fee Contact	Sample	Person	sample@ctc.ca.gov	
Contact Person	Sample2	Person2	sample2@ctc.ca.gov	
Dean	Sample3	Person3	sample3@ctc.ca.gov	
Staff	Sample	Person	sample@ctc.ca.gov	

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5) On the Create Contact page, update the staff's information. Next, click **SUBMIT**.

The staff's contact information will be updated on the Institution Contact page.

### Create Contact

**First Name**

**Last Name**

**Email**

**Phone**

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[SUBMIT](#)

6) To delete a contact record on the Institution Contacts page, click the  button below the ACTION column.

The contact record will no longer be listed on the Institution Contacts page. If the contact has an ADS account, the assigned permission(s) may be removed.

### Institution Contacts

Institution Name : California Sample Institution  
Contact Name : Sample2 Person2

Search:

ROLE	FIRST NAME	LAST NAME	EMAIL	ACTION
Accreditation Fee Contact	Sample	Person	sample@ctc.ca.gov	
Contact Person	Sample2	Person2	sample2@ctc.ca.gov	
Dean	Sample3	Person3	sample3@ctc.ca.gov	
Staff	Sample	Person	sample@ctc.ca.gov	

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