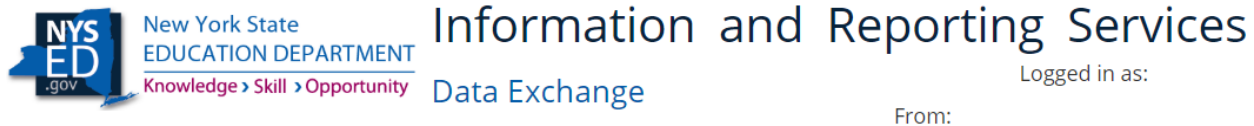


My Contacts Step-by-Step Guide

The 'My Contacts' form (formerly the NYSED-SUR1 Coordinator Survey) is now located in the IRS Data Exchange (IDEx).

Once signed into the IDEx the form can be found in the top-right hand corner of the screen to the left of the Log Out button as outlined in red below.


























On your list of contacts, you will see all the positions pre-filled with information provided on the previous year SUR1 form. You can update these contacts by clicking the pencil icon. Delete them by clicking the trash can icon or view the history with the clock icon.

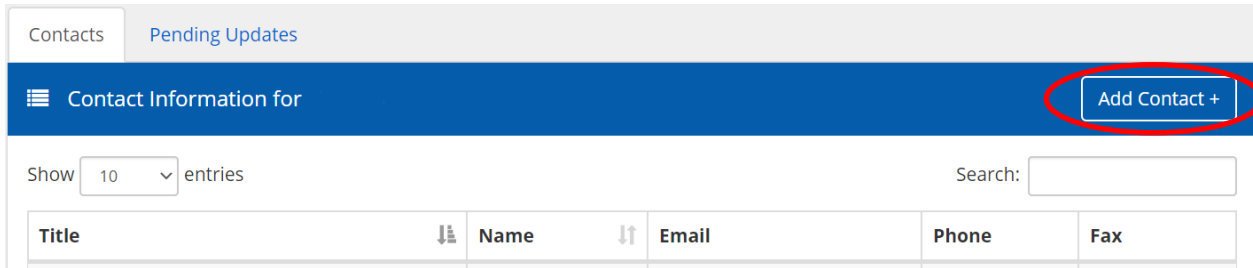
Only the Chief Executive Officer/President and the Director of Institutional Research have the ability to update these contacts by clicking the pencil icon and delete them by clicking the trash can icon

The Chief Executive Officer/President, the Chief Financial Officer, and the Director of Institutional Research contacts cannot be deleted (there is no trash can icon for these titles)

All IDEx users will be able to view the contact information, and the history information by using the clock icon.

Title	
BUNDY CONTACT	  
CAMPUS CHIEF SAFETY/SECURITY OFFICER	  
CAMPUS HAZARDOUS MATERIALS SAFETY OFFICER	  
CHIEF ACADEMIC OFFICER	  
CHIEF EXECUTIVE OFFICER/PRESIDENT	 
CHIEF FINANCIAL OFFICER	 
COLLEGE ASSESSMENT CONTACT	  
CONTACT FOR STUDENTS WITH SPECIAL NEEDS	  
DEAN SCHOOL OF EDUCATION	  
DESIGNATED TEACHER EDUCATION CONTACT	  

To add a new contact, click the ‘Add Contact +’ button located in the dark blue ribbon (shown below)



When you click ‘Add Contact’ the following fields will show. Please fill in as much information as possible and click ‘Create’ to add the position.

Create New Position ×

Title *

Salutation *

First Name * **MI** **Last Name ***

Generation

Phone * **Ext**

Fax **Ext**

Email Address *

Create

There is no longer a ‘Submit’ button. Once all the information shown is accurate the form is complete.

My Contacts Position Types

Chief Executive Officer	Used by the Office of Higher Education for official notices to the institution, institutional canvassing and official communications between the Department and the CEO
Chief Financial Officer	The person who should receive notices of program payments or queries regarding financial information for the institution.
Director of Institutional Research	The person at your institution fulfilling this function regardless of title.
Chief Academic Officer	This is the primary contact used by the Office of College & University Evaluation regarding program registration and review activities. It is usually the Vice-president for Academic Affairs or a College/University Dean.
Campus Chief Safety/Security Officer	This is the primary contact, available 24 hours, used by law enforcement, the Office of Homeland Security, or other like organizations for incidents and emergencies impacting campus

	operations, facilities, or personnel. This person must be trained and proficient in the Incident Command System and interactions with emergency responders and should be responsible for the institution's emergency response plans.
Campus Hazardous Materials Safety Officer	This is the primary contact, available 24 hours, used by fire departments, the Department of Environmental Conservation, and like spill and hazardous materials response and investigation organizations for all issues and incidents impacting campus operations, facilities, or personnel, including the storage, handling, and movement of hazardous materials of all types and quantities (e.g. radioactive, chemical, gas, flammable, explosive, corrosive). This person must be trained and proficient in the Incident Command System and interactions with emergency responders.
College Assessment Contact	Please identify the individual who the Department can contact regarding your institution's assessment practices.
HEDS Packet Coordinator	The primary contact at the institution who has oversight responsibility for receiving, distributing, completing, and returning HEDS forms.
Contact for Students with Special Needs	Please list the person responsible for assisting disabled students or students with other special needs.
Dean School of Education	(applies to institutions with teacher education programs ONLY) If your institution prepares students for teacher certification, please identify the individual who heads the Education area.
Designated Teacher Education Contact	(applies to institutions with teacher education programs ONLY) If your institution prepares students for teacher certification, please identify the individual to receive and respond to contacts by the Department's Office of Teaching.
BUNDY Contact	(applies to BUNDY participants only) For colleges approved for the Aid to Independent Colleges program, the person designated as the primary institutional contact for the program, who will be sent notices and questions regarding program changes and data submissions
Grants Officer	(applies to Perkins Career and Technical Education Act participants ONLY) Please identify the individual who administers your CTEA funds.
Perkins CTEA Grant Administrator	(applies to Perkins Career and Technical Education Act participants ONLY) Please identify the individual who administers your CTEA funds.
Nursing Program Contact	(applies to High Needs Nursing Aid participants only) The person designated as the primary institutional contact for the nursing aid program, who will be sent notices and questions regarding program changes and data submissions.