



School District 8  
Kootenay Lake

## Managing Contacts & Siblings

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## 1.0 District Standards for Entering Contacts

The standards below should be followed to ensure information is displayed correctly on these reports and to provide consistency in contact records across the province.

1. When withdrawing a student who is leaving the district, delete all contacts except the parents/guardians. If the student is withdrawing for a school that is within the district, this does not have to be done.

Contacts 4 of 6 selected

Priority	Title	Name	Type	Relationship	LivesWith	Parent or Guardian?	PickUp?	Include on IEP
<input type="checkbox"/>	1		Regular Contact	Mother	Y	Y	Y	N
<input type="checkbox"/>	2		Regular Contact	Father	Y	Y	Y	N
<input checked="" type="checkbox"/>	3		Emergency	Grandmother	N			
<input checked="" type="checkbox"/>	4	Mrs.	Emergency	Grandmother	N			
<input checked="" type="checkbox"/>	5		Emergency	Aunt	N			
<input checked="" type="checkbox"/>	99	Dr.	Other Contact	Doctor	N	N	N	N

**These contacts would be deleted if a student is withdrawing to attend a school OUTSIDE the district.**

### 2. Emergency priority: number contacts as per the guidelines below:

- a. **Parent/Guardian:** number 1, 2, 3, 4, etc. based on the order in which they would be contacted.
  - i. If an emergency contact, the priority number should be higher than the parent/guardian. Example: Parent/guardians have an emergency priority of 1 and 2. Emergency contacts are 3 and 4.
  - ii. Out of district contacts should be numbered higher than the parent/guardian and emergency contacts so they appear in the list *after* the local contacts.

- b. **Dentists:** assign a priority number of 98. When entering this information, only **Dr** should be entered in the **Legal first name** field.

**Correct dentist contact entry**

Emergency priority: 98

Title: [dropdown]

Legal first name: Dr

Legal last name: Oshust

[Search icon]

- c. **Doctors:** assign a priority number of 99. When entering this information, use the format First name – Dr in the Legal first name field.

**Correct doctor contact entry**

Emergency priority: 99

Title: [dropdown]

Legal first name: Dr

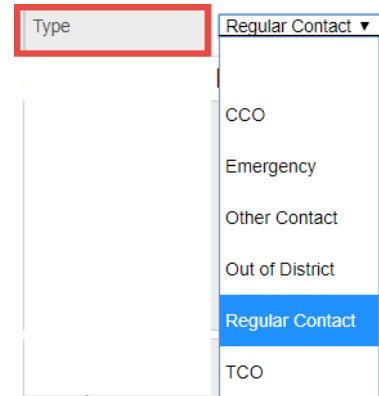
Legal last name: Franklin

[Search icon]

**Important:** Once entered, click the magnifying glass to search all contact records for the doctor or dentist name. Choose the one from the list, if it is there.

3. Maintain a single contact record in the database by using the search function (described in the Adding a Contact section below) when entering contacts for a student.


4. **Type** field: Choose contact type based on the guidelines below:
  - a. **Regular**: used when the contact is the parent or guardian of the student.
  - b. **Emergency**: used when the contact is the emergency contact for the student but is NOT a parent or guardian.
  - c. **Other Contact**: used for doctors, dentists, etc.
  - d. **CCO**: used when you have seen legal documentation indicating the contact has a continuing custody orders for the student.
  - e. **TCO**: used when you have seen legal documentation indicating the contact has a temporary custody orders for the student.
  - f. **Out of District**: used when the contact entered lives out of jurisdiction.

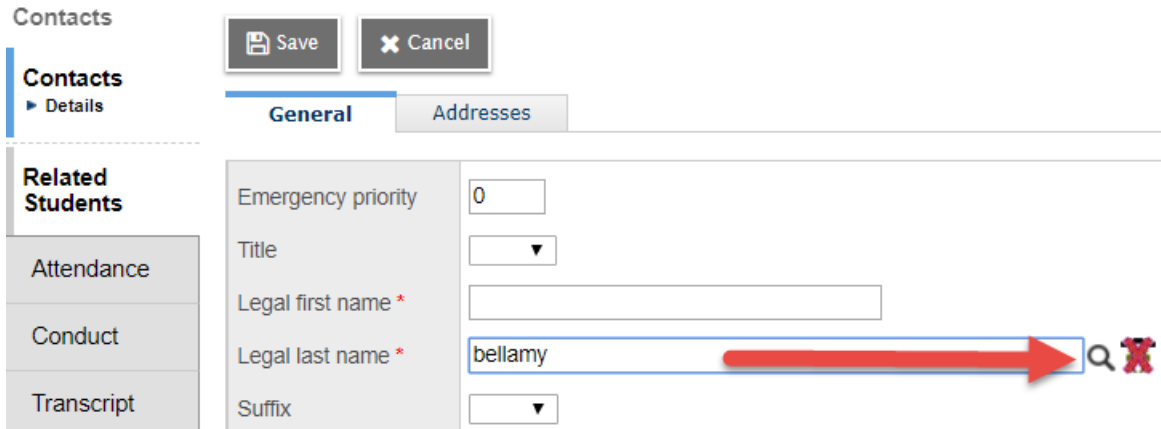


The image shows a screenshot of a web form. A dropdown menu is open for a field labeled 'Type'. The menu is currently set to 'Regular Contact'. The options listed in the dropdown are: Regular Contact (highlighted in blue), CCO, Emergency, Other Contact, Out of District, and TCO.

5. When updating information for shared contacts, be sure to correctly update the record for all students associated with that contact. This may necessitate communication with other schools that updates are being made. (See [Updating a Contact](#) section below).
6. Never overwrite the name of a contact with a new contact. If the new contact does not appear in the search list under All Contacts, then add them as a new one. (See instructions in 2.0 [Adding a Contact](#))

## 2.0 Adding a Contact

1. In the **Student** top tab, click the **Contacts** side tab.
2. In the **Options** menu, click **Add**. A *New Student Contact* window will appear.
3. In the **Legal last name** field, type the last name of the contact. You must click the  icon to search the database and see if the contact is already in the system.

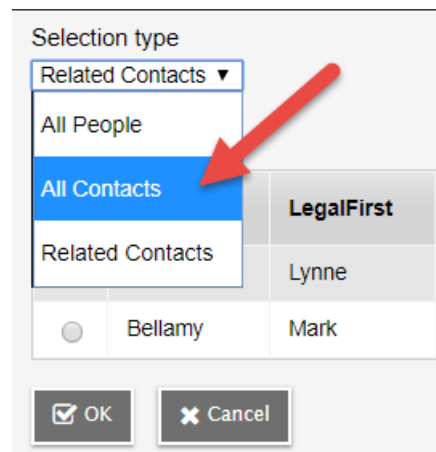


The screenshot shows the 'New Student Contact' form. The 'Legal last name' field is filled with 'bellamy'. A red arrow points to the magnifying glass icon next to the field. The form has tabs for 'General' and 'Addresses', and buttons for 'Save' and 'Cancel'.

4. In the pop-up window, set the *Selection type* drop-down menu to **All Contacts**.
  - a. **If the correct name appears only once in the list:** Click the radio button beside the name and click **OK**. This will populate the contact information in the contact screen. Adjust information, if necessary and click **Save**. Note: if this contact is already associated with

another student, the  icon will appear beside the last name, indicating this contact is shared.

Many students may share the same contact. For example, the parent of one student may be the emergency contact for another. This contact should only be in the system once and shared between the students.



The screenshot shows the 'Selection type' pop-up window. The 'Selection type' dropdown menu is open, showing 'All Contacts' selected. A red arrow points to the 'All Contacts' option. The window also shows a table with columns 'LegalFirst' and 'Lynne', and a row with a radio button, 'Bellamy', and 'Mark'. Buttons for 'OK' and 'Cancel' are at the bottom.

**b. If NO contact in the list matches the name entered:**

Check to ensure the selection type is set to **All Contacts**. If the contact still does not appear, click **Cancel** and proceed to enter the information for the contact directly into the *New Student Contact* window. Remember to click **Save** when finished.

Refer to the *District Standards for Entering Contacts* section of this document to correctly input this data.

**NEVER put two first names in the Legal first name field (ex. Don & Lisa). If there are two contacts with the same last name, they must each have their own contact record.**

- i. Use the **Relationship** field to indicate the relationship of the contact to the student (ex. Parent, Aunt, etc.)
- ii. Check the **Parental Auth or Guardian?** box if the contact is the parent or guardian of the student.
- iii. Check the **Contact can pick up?** box if the contact has permission to pick up the student at school in the case of illness, etc.
- iv. Check other “permission” boxes as appropriate. Most of these boxes are only checked for contacts who are the parent or guardian of the student.

The screenshot shows the 'General' tab of a contact form. It contains several sections:
 

- Personal Information:** Emergency priority (0), Title, Legal first name (Lynne), Legal last name (Bellamy), Suffix, Usual first name (Lynne), Usual last name (Bellamy), Gender (F), Relationship (Parent), Type (Regular Contact).
- Communication:** Receive grade mailing, Receive conduct mailing, Receive other mailing, Receive email, Include on IEP, Prevent Autodialing.
- Permissions:** Parental Auth or Guardian?, Contact can pick up?, Contact lives with student, Contact has family portal access, Volunteer?.
- Shared Contact Information:** Home phone (250-368-5543), Cell phone (250-512-1767), International Phone #, Primary email, Alternate email, Place of Employment, Work phone, Work Phone Extension, Pager Number, Language of Correspondence, Speaks English, Home Language.

 Annotations include:
 




- 1: Red circle around the legal last name field.
- 2: Red circle around the legal first name field.
- 3: Red circle around the gender dropdown.
- 4: Red circle around the relationship dropdown.
- 5: Red circle around the contact type dropdown.
- 6: Red circle around the home phone field.
- 7: Red circle around the 'Receive other mailing' checkbox.
- 8: Red circle around the 'Parental Auth or Guardian?' checkbox.


 A callout box with a green border points to the checkboxes in sections 7 and 8, containing the text: "These boxes are typically checked if the contact is the parent/guardian of the child. Others checked as appropriate."

**c. If multiple contact records with the same name appear:**

Try to determine which contact is the correct one and select it. Advise district support that multiple contact records exist and which one has been used. If the correct one cannot be determined, contact district support for resolution.

	LegalLast	LegalFirst	PhysAdrs > StreetAddress	HomePhone	WorkPhone
<input checked="" type="radio"/>	Bellamy	Lynne	1688 Noran St	250-368-5543	
<input type="radio"/>	Bellamy	Lynne		250-555-9816	

5. Enter address information for the contact. Click the **Addresses** sub-top tab.
  - a. **Street address:** Type the street address as per Canada post conventions.
    - i. Click the  icon to find the address record in the database. Select the address from the list and click **OK**.
    - ii. Click the  button to generate the validate address pop-up window. Click the **Validate** button and ensure all the address components fall into their proper field. Click **OK**.
  - b. **City Prov PC:** Type in the city, province and postal code. Click the  button to generate the validate address pop-up window. Click the **Validate** button and ensure all the address components fall into their proper field. Click **OK**.
  - c. Click **Save**.

**Note:** if other contacts or students in the database have the same address, the  icon will appear to indicate that the address is shared.

### 3.0 Updating Contact Information

From time to time, contact information may require update. As multiple students may be associated with the same contact, *it is important to ensure shared information is updated for the correct people.*

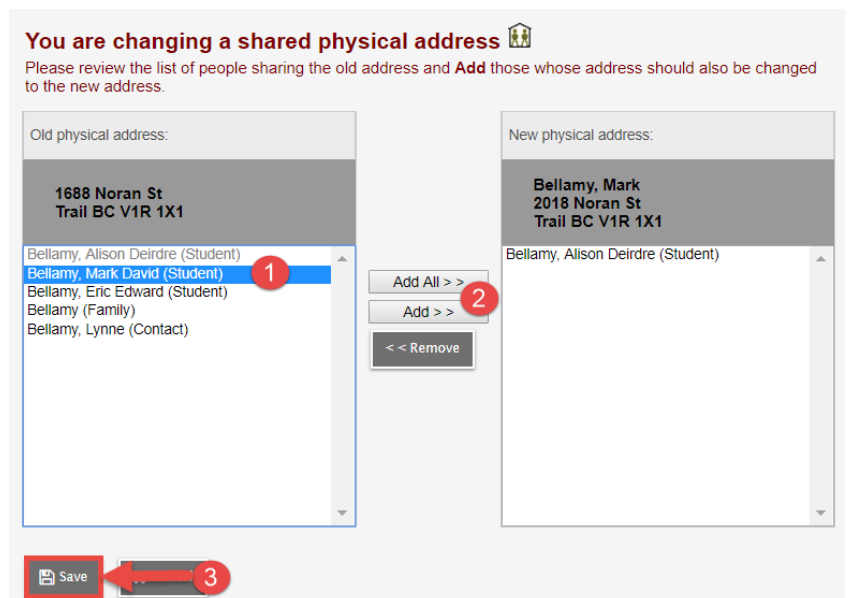
*It is also important to communicate between schools that contact information is being updated, where the contact is shared between students that do not attend the same school.*

1. in the **Contacts** side tab, click the blue hyperlink for the contact requiring update. This opens the contact's detail screen.
2. When changing the address for a shared contact, a pop-up window will appear to prompt the update of the record for all individuals associated with that address.

- a. Click to select the names in the *Old physical address* window on the left and then click **Add >>** to move them to the *New physical address* window on the right. If all records should be updated, click **Add All >>**.

*Names that are not selected and added to the window on the right will not be updated with the new address information!*

- b. Click **Save** in the pop-up window to update the records.
- c. Click **Save** in the contact window to save the update.



## 4.0 Deleting a Contact from a Student Record

A parent or guardian may instruct you to add or remove a contact from their student record. Follow the guidelines below.

When withdrawing a student that will be moving out of the district, delete all contacts except the parent/guardian contacts.

- **NEVER** change or overwrite the name on an existing contact record as a means of adding a new one! Always add the new contact using the instructions in the *Adding a Contact* section of this guide.
- **Deleting** a contact from a student record does not delete them from the system or remove the contact from other student records if it is shared. It only removes the contact's association to this particular student.

**To delete a contact:**

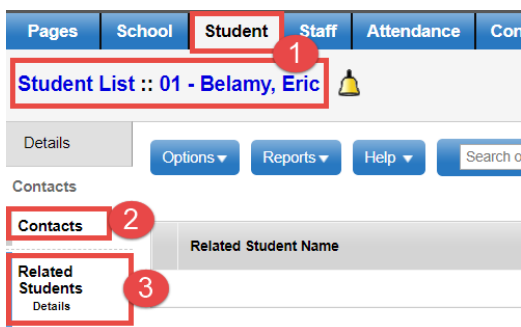
1. Check the box beside the student for whom a contact is being removed.
2. Click the **Contacts** side tab.
3. Check the box beside the contact to be deleted.
4. In the **Options** menu, click **Delete**. Read the pop-up message and continue the deletion, if appropriate.

If the contact is being deleted from more than one student record, the process must be repeated for each student.

## 5.0 Siblings

Siblings can be connected to each other in MyEd BC. Both siblings must be registered in the system first, and then connected. The process requires that 2 records exist for each connected sibling, so they properly on the BC Student Information Verification report.


1. In the **Student** top tab, check the box beside the first of the students to be connected.
2. Click the **Contacts** side tab.
3. Click the **Related Students** sub-side tab.

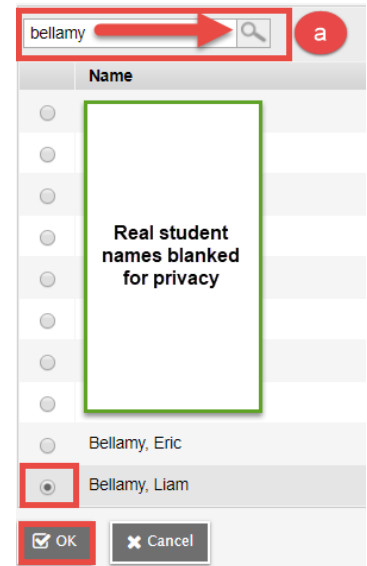


4. In the **Options** menu, click **Add**.

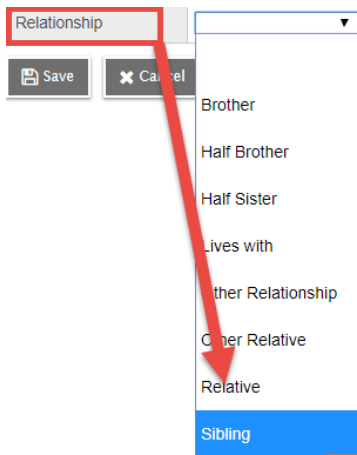


5. In the *New Related Student* window, populate the fields as follows:

a. **Name:** Use the  icon to generate the student pick list for the school. Search for the name of the sibling to be attached to this student and click **OK**.



b. **Relationship:** Use the drop-down menu to select **Sibling**.



c. Click **Save**.

6. Go to the other sibling's record and do the same. When the siblings are properly connected to each other, the name of the sibling will appear twice for each student.

