





Parents/Guardians:

- A. Emergency Priority: 1 (Mother) or 2 (Father); each record has a unique number.
- B. Relationship: choose a relationship
- C. Parents are Regular Contacts (possibly Out of District, but NOT emergency)
- D. Check the five boxes shown. Do NOT check Prevent Autodialing. We must be able to contact Parents.
- E. The first box MUST be checked for primary caregivers. The other two shown are typical, but may vary.

Emergency priority	<input type="text" value="1"/> A	Receive grade mailing	<input checked="" type="checkbox"/>	Parental Auth or Guardian?	<input checked="" type="checkbox"/>
Title	<input type="text" value=""/>	Receive conduct mailing	<input checked="" type="checkbox"/>	Contact can pick up?	<input checked="" type="checkbox"/>
Legal first name *	<input type="text" value=""/>	Receive other mailing	<input checked="" type="checkbox"/>	Contact lives with student	<input checked="" type="checkbox"/>
Legal last name *	<input type="text" value=""/>	Receive email	<input checked="" type="checkbox"/>	Contact has family portal access	<input type="checkbox"/>
Suffix	<input type="text" value=""/>	Include on IEP	<input checked="" type="checkbox"/>	Volunteer?	<input type="checkbox"/>
Usual first name	<input type="text" value=""/>	Prevent Autodialing	<input type="checkbox"/> D		E
Usual last name	<input type="text" value=""/>				
Gender	<input type="text" value="F"/> B				
Relationship	<input type="text" value="Mother"/> C				
Type	<input type="text" value="Regular Contact"/>				

Emergency Contacts:

- A. Emergency Priority: 3 or higher (even if there is no #2)
- B. Relationship: choose a relationship
- C. Emergency contacts are either Emergency or Out of District
- D. Do not check any of these boxes
- E. Typically, only one box is checked here. Do NOT check "Parental Auth or Guardian?" box.

Emergency priority	<input type="text" value="3"/> A	Receive grade mailing	<input type="checkbox"/>	Parental Auth or Guardian?	<input type="checkbox"/>
Title	<input type="text" value="v"/>	Receive conduct mailing	<input type="checkbox"/>	Contact can pick up?	<input checked="" type="checkbox"/>
Legal first name *	<input type="text"/>	Receive other mailing	<input type="checkbox"/>	Contact lives with student	<input type="checkbox"/>
Legal last name *	<input type="text"/>  	Receive email	<input type="checkbox"/>	Contact has family portal access	<input type="checkbox"/>
Suffix	<input type="text" value="v"/>	Include on IEP	<input type="checkbox"/>	Volunteer?	<input type="checkbox"/>
Usual first name	<input type="text"/>	Prevent Autodialing	<input type="checkbox"/>		
Usual last name	<input type="text"/>				
Gender	<input type="text" value="F"/> F		D		E
Relationship	<input type="text" value="Grandmother"/> B				
Type	<input type="text" value="Emergency"/> C				

Scenarios:

Contact Type	Priority Number	Contact Type	Extra Boxes to Check
	0 - Not to be used		
Parents/Guardians	<ul style="list-style-type: none"> • Top Positions: 1, 2, ... • Mother = 1, Father = 2 • Each person gets a unique priority number • Each person gets a separate record 	Regular	<ul style="list-style-type: none"> • Parental Auth or Guardian? • Contact can pick up? • Family portal access? • Various email preferences
Government Agency as primary caregiver: • This is reflected in the relationship field, and contact type	<ul style="list-style-type: none"> • Use a person's name and direct phone number. • Top Positions: 1, 2, ... • Each person gets a unique priority number • Each person gets a separate record 	Regular	<ul style="list-style-type: none"> • Parental Auth or Guardian? • Contact can pick up? • Family portal access? • Various email preferences
Emergency Contacts	<ul style="list-style-type: none"> • Each person gets a unique priority number • Each person gets a separate record 	Emergency Contact	<ul style="list-style-type: none"> • Contact can pick up?
Doctor/Dentist	Do not enter	Not to be used	
Out of District	<ul style="list-style-type: none"> • Each person gets a unique priority number 	Out of District	

For situations not listed here, please refer to the MyEdBC Standards Manual found at:
<http://www.myeducationbc.info/resources/school-users/>

Contacts Cleanup

1. Global TopTab > Favorite SideTab > Student Contact Table
2. Field Set = Contacts Cleanup

Mass Updating an Emergency Priority Number

Example: We want all contacts labeled “Mother” to have an Emergency Priority number = 1

Field	Emergency priority
Value	1

- A. Filter = “Relationship = ?”
- B. Be **very** careful that you did Step #A... **Options > Mass Update > Emergency Priority + a number**

Updating Parent Portal Access

Example: We want to allow all Contacts that are listed as Parent/Guardian to access the Family Portal.

- A. Filter = “Parent Portal Prep”
- B. Options > Modify List > Click on the Pencil icon below the PortalAccess heading
- C. Values are N (No) or Y (Yes). Click the green checkbox at the top to save your work. Do not change pages without saving your work.

3. The EMAIL 2 field has been populated with identified records that contain errors.

This is a manual process, and some could be missed. Please ensure that all important data is present and accurate.

Filter = Contacts ERROR