



Multiple Student Family Contact Cleanup Quick Reference Card

Quick Steps

1. Detach Student and Parent Addresses
2. Make sure Related Student Associations are Setup
3. Update Contact information
4. Setup Parent/Guardian fields
5. Link Parent/Guardians to Merge them in General sub-top-tab
6. Share Parent/Guardian Address to **First Student only** in Addresses sub-top-tab
7. Share Addresses between Siblings

Detailed Steps

1. Detach Student and Parent Shared Addresses
 - a. Student > Details > Addresses
 - b. If student already has a shared address, Remove the association
 - c. Click the , and select detach
 - d. Make sure address is verified
 - e. Student > Contacts Side Tab > Parent/Guardian Addresses sub top tab
 - f. If parent/guardian already has a shared address, Remove the association
 - g. Click the , and select detach
 - h. Make sure address is verified
 - i. Repeat with 2nd parent/guardian if applicable
2. Make sure all Related Student associations are setup
 - a. Student > Contacts > Related Students
 - b. Relationship must go both ways
 - c. The student name in the first column is who owns the relationship.
 - d. The student you are in must show up in the first column the number of times he/she has siblings.

Shared Address	
Street address	1305 Ray Rd
RR Number / PO Box	
City Prov PC	Kelowna BC V1X 7K4
Shared with	
Name	Type
Simpson, Maggie	Student
Simpson, Homer	Contact
Simpson, Marg	Contact
Simpson, Lisa	Student

Close Detach Clear

<input type="checkbox"/>	Related Student Name	Relationship
<input type="checkbox"/>	Simpson, Lisa	Brother
<input type="checkbox"/>	Simpson, Maggie	Brother
<input type="checkbox"/>	Simpson, Lisa	Sister
<input type="checkbox"/>	Simpson, Maggie	Sister

3. Update Contact Information
 - a. Student > Contacts
 - b. Update contact name fields
 - i. Both first and last names need to be entered
 - ii. Each contact is entered separately
 - iii. Remove symbols, Dr., Mr., Mrs., etc. from Name Fields
 - c. Make sure priority numbers are correct

Name
& Marcus, Shelly
., Margaret
?, Mary/Mic
Adams, Rowena,eroy
Agar, Roxanne & David

4. Setup Parent/Guardian fields
 - a. Students > Contacts
 - b. Select Parent/Guardian Contact > General sub-top tab
 - c. Check off appropriate checkboxes on right side of contact details

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

5. Link Parent/Guardian Contacts to Merge them
 - a. Student > Contacts
 - b. Select Parent/Guardian Contact > General sub-top tab
 - c. Click the icon, link to themselves with an address
 - d. Check that the link has been created
 - i. If link wasn't created, select the other occurrence of their name until the link is created
 - e. Repeat with 2nd parent/guardian if applicable
 - f. Confirm all Parent/Guardians have a icon with additional students listed
 - g. Complete this step for **each student** in family until all Parent/Guardians have a in multiple student families

Student List :: 02 - Simpson, Lisa :: Simpson, Homer

Details | Options | Reports | Help

Contacts | Save | Cancel

Contacts Details | General | Addresses

Related Students

Emergency priority:

Legal first name:

Legal last name:

https://sdt.myeducation.gov.bc.ca/aspen/contactPickList.do?multi=false&addit...

Secure | https://sdt.myeducation.gov.bc.ca/aspen/contactPickList.do?mult

Selection type: Related Contacts

	LegalLast	LegalFirst	PhysAdrs > StreetAddress
<input checked="" type="radio"/>	Simpson	Homer	
<input type="radio"/>	Simpson	Homer	1305 Ray Rd
<input type="radio"/>	Simpson	Homer	

6. Share Parent/Guardian Address with **FIRST** Student only
 - a. Student > Contacts
 - b. Select Parent/Guardian Contact > Addresses sub-top tab
 - c. 1st parent/guardian
 - i. Click icon, Choose student working in
 - d. Repeat with 2nd Parent/Guardian if applicable

Student List :: 03 - Simpson, Bart :: Simpson, Homer

Details | Options | Reports | Help

Contacts | Save | Cancel

Contacts Details | General | Addresses

Physical Address

Street address:


Addresses - Google Chrome


Secure | https://sdt.myeducation.gov.bc.ca/aspen/addressPickList.do?mult

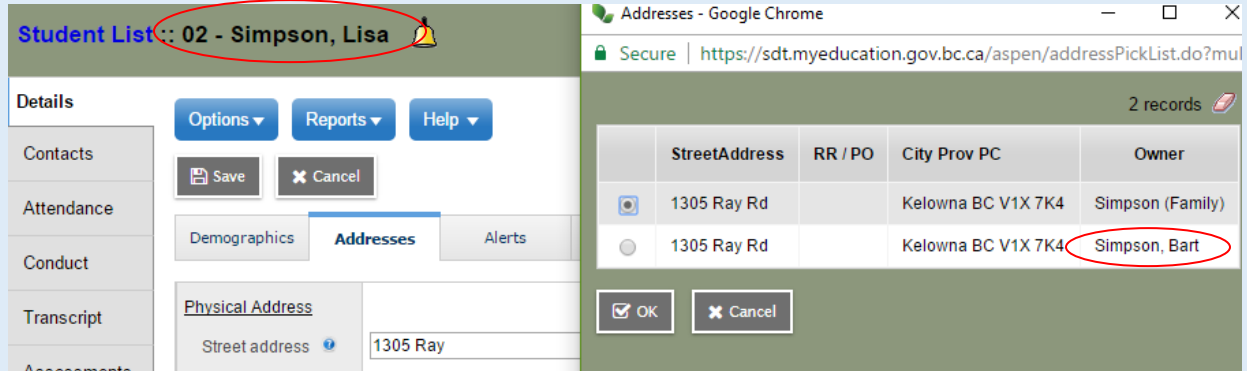
2 records

	StreetAddress	RR / PO	City Prov PC	Owner
<input type="radio"/>	1305 Ray Rd		Kelowna BC V1X 7K4	Simpson (Family)
<input checked="" type="radio"/>	1305 Ray Rd		Kelowna BC V1X 7K4	Simpson, Bart

7. Create Shared Addresses between Siblings

a. In **2nd students** Addresses sub-top-tab, click  icon and select **1st student**

b. In **3rd students** Addresses sub-top-tab, click  icon and select **2nd student**



Student List: 02 - Simpson, Lisa

Details

Options Reports Help

Save Cancel

Demographics Addresses Alerts




Physical Address

Street address 1305 Ray

StreetAddress	RR / PO	City Prov PC	Owner
1305 Ray Rd		Kelowna BC V1X 7K4	Simpson (Family)
1305 Ray Rd		Kelowna BC V1X 7K4	Simpson, Bart

OK Cancel

When Complete:

- Each student should have a  icon with each parent/guardian(s), and each sibling listed
- Parent/guardians contacts should have a  icon with each sibling listed
- Parent/guardians should have a  icon with additional parent/guardian and all students listed