



# Student Contact Management & Contact Linking

Session 170-2



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# Agenda

1

Key Areas

Update Code Table

Portal Groups Security - Setting appropriate security for the Contact page

Portal Options

District Settings

CALPADS Other Options Tab

2

Best Practices for implementing student Contact records

Procedures for utilizing Red Flags on the Contacts page

Fields to be utilized if Auto Create Parent Portal accounts is turned on

3

Method to Identify Tables and Fields to be used for queries

4

Significance of specific fields and their purposes

5

Linking Contact phone numbers to the Student Demographics page to reduce redundant data input

6

Copy/Paste Contact records to other students/siblings





# Key Items - Update Code Table

- Code Table Management/Update Code Table
- Some Codes will require a number in the Amount field
  - Restricted Contact the amount field = 9.00

[Aeries Documentation - Code Table Management](#)

Aeries Student Information System

2023-2024 Screaming Eagle High School

Update Code Table

Current Table-Field Codes

Table: CON Field: CD

Go to Default Code Management

Code	Description	Category	Amount	Sort	Tag	Image	Translation 1	Translation 2	Translation 3	Translation 4	Translation 5	Translation 6
EM	Emergency Contact		0.00									
P1	Parent/Guardian 1		0.00									
P2	Parent/Guardian 2		0.00									
RR	Restricted Contact		9.00									



# Key Items - Portal Options

- Located on the Portal Options Page > School Level > Contacts Tab
  - Can be used to allow parents to update contacts
  - Limit to only Educational Rights Holders for Contacts and Parent Data Confirmation

## Aeries Documentation - Portal Options Setup

**Aeries** Student Information System

2020-2021 Screaming Eagle High School

Search students...

Pages Reports Favorites

portal options

School Info

Portal Management

Portal Options

Code Name

99	Transfer School
100	Period Positive
101	HYBRID Learning & ATT
102	HYBRID Learning 2 Sections
800	Virtual School
884	Flex Scheduling High School no ATT
894	Flex Scheduling High School with ATT
990	Golden Eagle Elementary School
991	Tawny Eagle YR Elementary School
992	Hawk Elementary for ATT
993	Bald Eagle Intermediate School
994	Screaming Eagle High School
995	Aeries Continuation School
996	Eagle Night School
997	Eagle Alternative Education School
998	Eagle Summer School
999	ZZZ Inactive Students

Go to Portal Groups

Portal Options: English

Attendance Contacts Grades Gradebook PFT Scheduling Miscellaneous Parent Data Changing

**Contact Options**

☐ Allow Portal Accounts to Self-Associate

☐ Only Educational Rights Holders may manage Contacts or complete Data Confirmation

**Contact Management Windows**

Enter a start and end date for each window. On days within these windows, if parent portal users have permissions they will be able to make changes to other contacts associated with their students.

Parent Data Confirmation windows can also be used to enable contact management, if either window is open contacts will be updatable by qualifying parent accounts.

to

to

to

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to

to



# Key Items-Portal Groups & Permissions

[Aeries Documentation - Portal Groups](#)

**Aeries**  
Student Information System

2020-2021 Screaming Eagle High School

Search students...

Pages Reports Favorites

portal groups

Security

Portal Groups

### Portal Groups

Security changes may not take effect for up to 5 minutes due to caching.

hide records

ID	Name	Description
29	Parents	
255	Restricted Portal Accounts	
30	Students	
107	Substitute Teachers	
28	Teachers	

1 - 5 of 5 items

Portal Options

## Portal Permissions

2020-2021 Screaming Eagle High School

### Portal Groups

Security changes may not take effect for up to 5 minutes due to caching.

show records

#### Group Information

ID	Group Name	Date Created	Status
29	Parents	9/27/2017 4:49:15 PM	Active

Comment

Change

Emergency Contacts	CON						
		✓	✓	✓	✓	□	
District Student Lookup		□					
AIR Import		□	□				

Attendance / Enrollment

## Field Level Permissions

Parents - CON Table Field Security

Field	Name	Read	Update
SC	School	✓	✓
SN	Student#	✓	✓
NM	Name	✓	✓
AD	Street Address	✓	✓
CY	City	✓	✓
ST	State	✓	✓
ZC	Zip code	✓	✓
TL	Telephone	✓	✓
ME	Memo	✓	✗
CD	Code	✓	✓
MT	Mail	✓	✓
WP	Work Phone	✓	✓
WX	Extn	✓	✓





# Key Items-District Settings

[District Settings Aeries Documentation](#)

Linking Contact Settings

**Aeries**  
Student Information System

2020-2021 Screaming Eagle High School

Search students...

Pages Reports Favorites

district settings

School Info

Configurations

District Settings

**District Settings**

**Be very careful when changing these Settings!**

Changes may not take effect for up to 5 minutes due to caching.

**Student Settings**

- ☒ Students must be inactive at last school before enrollment at another school.
- ☒ Use STU.TG to determine if a student is inactive at last school when transferring records.
- ☐ Transferring (Copy Student) from the District Student Lookup (Multi-Year District Search) requires User to have Student Administer permission.
- ☐ Assign new student ID numbers from district database only, not from school.
- ☐ Automatically populate student photograph (STU.BM) with student ID (STU.ID).

[blank] Default Gender Code

**Student Address Settings**

- ☐ Next School (STU.NS) is the next grade-level, not next matriculation-level.
- ☐ Do Not update Next School (STU.NS) field on address or grade change.
- ☐ Update of Student Next School Field (STU.NS) requires User to have Student Delete permission.
- ☐ Update of School of Residence Field (STU.RS) requires User to have Student Delete permission.

**Other Student Settings**

- ☒ Link Primary Contacts (STU.FW / STU.MW) from Emergency Contacts form.

Initialize Contact Linking ☒ Keep Existing Links



# Key Items-District Settings

## Aeries Documentation - District Settings

### Requirements for Portal Accounts

District Settings	
<input type="checkbox"/>	Do NOT Optimize Graduation Status.
<input type="checkbox"/>	Process Courses for Graduation Status Calculation Chronologically.
<input checked="" type="checkbox"/>	Use New Career Pathways (CPW) tables instead of old "CTE Pathways (Perkins)" (CTE) table. <input type="button" value="Convert CTE to CPW"/>
<input type="checkbox"/>	Automatically Generate Staff IDs.
<input type="checkbox"/>	Allow Transition Grade Reporting Mark Points.
<input checked="" type="checkbox"/>	Use Advanced Discipline (DIS) Page.
<input checked="" type="checkbox"/>	Show the Demerits field on the Assertive Discipline Page
5	Number of Offenses allowed (1-5) by Assertive Discipline record
<input type="checkbox"/>	Use Financials (Instead of Fees and Fines).
<input type="checkbox"/>	Disable School Based Attendance Letters
<input type="checkbox"/>	Enable ADA Weighting based on Attendance Program.
<input type="checkbox"/>	Hide the "Days with Truancies" total on the Student Attendance Page
<input type="checkbox"/>	Remove Attendance Fill Periods Option: "All day code will go in every period the student has classes".
<input type="checkbox"/>	Default State Reporting Field Highlighting to ON.
<input type="checkbox"/>	Do not display the STU.SN field in the system.
<input type="checkbox"/>	Warn when students do not have an SSN or State Alternate ID.
	Inactives School
P1,P2	Codes Identifying Parent/Guardian in Contacts (CON.CD)
<input type="checkbox"/>	Parent Portal Only - Require First Name, Last Name, and Ed Level for Parents/Guardians.
<input type="checkbox"/>	Parent Portal Only - Require at least one Contact Record to be Parent/Guardian.

### Selecting Codes to Identify Guardians

District Settings	
<input type="checkbox"/>	Do NOT Optimize Graduation Status.
<input type="checkbox"/>	Process Courses for Graduation Status Calculation Chronologically.
<input checked="" type="checkbox"/>	Use New Career Pathways (CPW) tables instead of old "CTE Pathways (Perkins)" (CTE) table.
<input type="checkbox"/>	Automatically Generate Staff IDs.
<input checked="" type="checkbox"/>	Allow Transition Grade Reporting Mark Points.
<input checked="" type="checkbox"/>	Use Advanced Discipline (DIS) Page.
<input checked="" type="checkbox"/>	Show the Demerits field on the Assertive Discipline Page
5	Number of Offenses allowed (1-5) by Assertive Discipline record
<input type="checkbox"/>	Use Financials (Instead of Fees and Fines). Please note this will disable the use of "Fees" in Web and Client.
<input type="checkbox"/>	Disable School Based Attendance Letters
<input type="checkbox"/>	Enable ADA Weighting based on Attendance Program. Please note this will require setting up values via the <a href="#">Define Attendance Programs</a> page.
<input type="checkbox"/>	Default State Reporting Field Highlighting to ON.
<input type="checkbox"/>	Do not display the STU.SN field in the system.
<input type="checkbox"/>	Warn when students do not have an SSN or State Alternate ID.
	Inactives School
Codes Identifying Parent/Guardian in Contacts (CON.CD):	
<input type="checkbox"/>	P - Parent
<input type="checkbox"/>	R - Restricted

You will need to add those codes using the "Update Code Table"

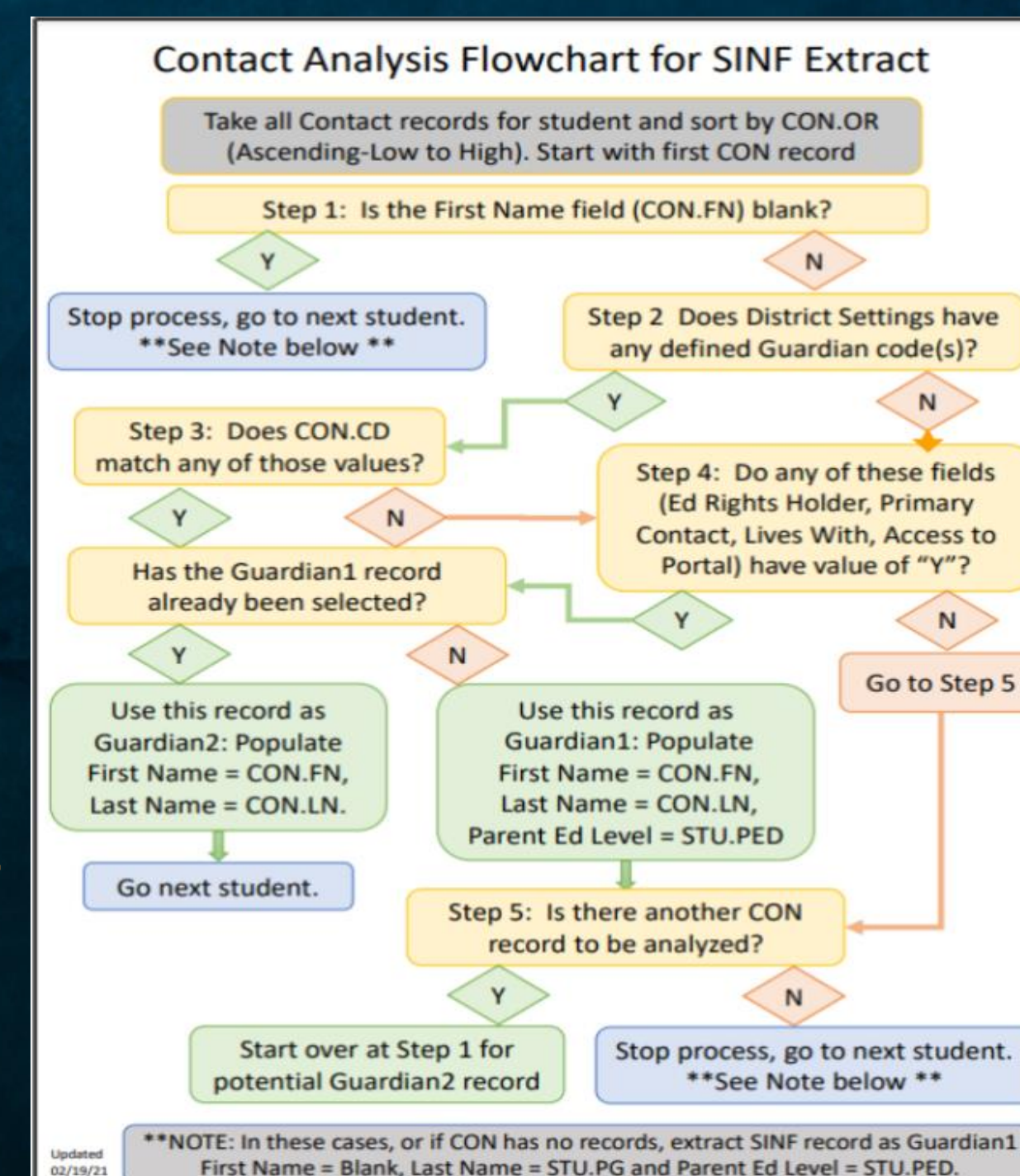




# Contacts and CALPADS - Updates

Beginning in 2023/2024 academic year as of 09/19/2023, the SINF extract will now include Parent Ed Levels for both Parent/Guardians submitted. The Parent Education Levels will be extracted from the **Contacts (CON)** table under the **Ed Level** field (CON.ELV).

The screenshot shows the 'Enrollment Update' interface with the 'SINF' tab selected. It includes a sidebar with navigation links like 'Identifiers', 'CALPADS History', and 'Fall 2'. The main area has a checkbox for 'Do not extract dates in the future' and a date picker for 'Effective date for SY 2023-2024 changes' set to 09/19/2023. A note explains that this date determines when 2023-2024 changes go into effect. A 'Reconciliation Data' box at the bottom states that the school selection should match between the CALPADS SENR ODS and the school selected in the CALPADS Extracts page.



Aeries Documentation – Managing Contacts/Identifying Guardians for SINF Extract



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# Best Practices

- ♦ Ideal place to store contacts that are authorized to pick up the student
- ♦ Each student should have at least 1 contact
- ♦ First 2 contacts are usually Mother and Father (**Order 1 or 2**)
- ♦ Usually, only contacts with an email address will be parents/guardians
- ♦ If using a Red Flag on a specific contact for legal purposes also add a Red Flag to the Contacts page

Contacts

Add

Adam Abbott

5647 Elm St, Eagle Rock CA 99999(Work Address)

parent@aeries.com

Work: (777) 555-7537

Father

Copy of All Mail

More Info

Entered Date: 11/14/2023

Last Updated: 7/10/2023 6:06 PM

Sara Abbott

CA

Mailing Name: Sara Abbott

SaraAbbott@example.com

(777) 555-9448    Cell: (777) 569-1498

Mother

More Info

Entered Date: 11/14/2023

Last Updated: 10/26/2023 7:17 AM





# Specific Fields And Uses

- ♦ **Tables and Fields Icon** will present an overlay of the tables and fields for the specific page
- ♦ The **Lock** field gives users the ability to lock down certain contact records so that they may not be changed in the Parent Portal.
- ♦ **Lives With** will copy the address from the Student Demographics page can also be used with setting for
  - ♦ Mass Assign Family Keys
  - ♦ Used in Determining which Contacts will be evaluated for CALPADS
  - ♦ Will auto-populate the contact address with the address of the student
- ♦ [Aeries Documentation – Mass Assign Family Keys](#)
- ♦ [Aeries Documentation – Managing Contacts/Identifying Guardians for SIN Extract](#)



# Specific Fields Continued

- ♦ **Address Type** is a State Reporting field for Texas
- ♦ The **Red Flag** field turns on a Red Flag for this Contact record. If used, there should be further explanation in the **Comment** field. Once turned on, this record will automatically go up to the top of the list of contacts for this student. Once turned on, the Contacts page Red Flag should also be turned on as well.
- ♦ **Relationship**
  - ♦ Mass Assign Family Keys
  - ♦ [Aeries Documentation – Mass Assign Family Keys](#)
  - ♦ [Aeries Documentation – Managing Contacts/Identifying Guardians for SINr Extract](#)





# Specific Fields Continued

- ♦ **Primary Contact**

- ♦ Mass Assign Family Keys
- ♦ Used in Determining which Contacts will be evaluated for CALPADS

- ♦ [Aeries Documentation – Mass Assign Family Keys](#)

- ♦ The **Ed Rights Holder** Field can be used to designate those contact(s) that are allowed to update Contacts or complete the Student Data Confirmation process. Some Portal Options setup required

- ♦ Mass Assign Family Keys
- ♦ Update Code Table > Amount Value = 2.0
- ♦ Used in Determining which Contacts will be evaluated for CALPADS

- ♦ [Aeries Documentation – Portal Options Contacts](#)

- ♦ [Aeries Documentation – Managing Contacts/Identifying Guardians for SINF Extract](#)



# Specific Fields Continued

- ♦ The **Record Type-CON.CD (California Districts)**
  - ♦ Used to classify contact records into types-***Important for CALPADS SINR Extract***
  - ♦ Field can be setup to cause a Contact to have initial restricted access, which will trigger an email to the school before the Contact will be allowed full access. Update Code Table
  - ♦ Will send email to Email Address located in the “Portal Confirmation Email Address” on the School options page
  - ♦ Update Code Table > Amount Value = 9.0
  - ♦ Mass Assign Family Keys
- ♦ [Aeries Documentation – Managing Contacts/Identifying Guardians for SINR Extract](#)
- ♦ [Aeries Documentation – Limiting or Restricting Parent/Student Portal Accounts](#)
- ♦ [Aeries Documentation – Mass Assign Family Keys](#)





# Specific Fields Continued

- ♦ The **Notification Preferences** field is only utilized by districts using Aeries Communications. Districts not using Aeries Communications can disregard this field
  - ♦ Aeries Communications
- ♦ **Attendance Notifications**
  - ♦ Aeries Communications
- ♦ [Aeries Documentation – Aeries Communications Attendance Notifications Configuration](#)





# Specific Fields Continued

- ♦ The **Mail Tag** field can be set for duplicate mailing for parents/guardians living in at a different address.
  - ♦ District Attendance Letters
- ♦ [Aeries Documentation – District Attendance Letters](#)
- ♦ **Contact Order** This Field is automatically populated in the order the contact is created but can be modified
  - ♦ A contact record that is Red Flagged will automatically move to the top
  - ♦ Used in Determining which Contacts will be evaluated for CALPADS
- ♦ [Aeries Documentation – Managing Contacts/Identifying Guardians for SINF Extract](#)





# Specific Fields Continued

- ♦ The **Corr Lang** field allows a contact to have a different Correspondence Language than what appears on the Demographics page
  - ♦ Aeries Communication
- ♦ [Aeries Documentation – Aeries Communications Mapping](#)
- ♦ The **Education Level-CON.ELV**
  - ♦ Same values as Parent Ed Level on the Student Demographics page-*STU.PED-Important for **CALPADS SINF Extract***
- ♦ [Aeries Documentation – Managing Contacts/Identifying Guardians for SINF Extract](#)





# Specific Fields Continued

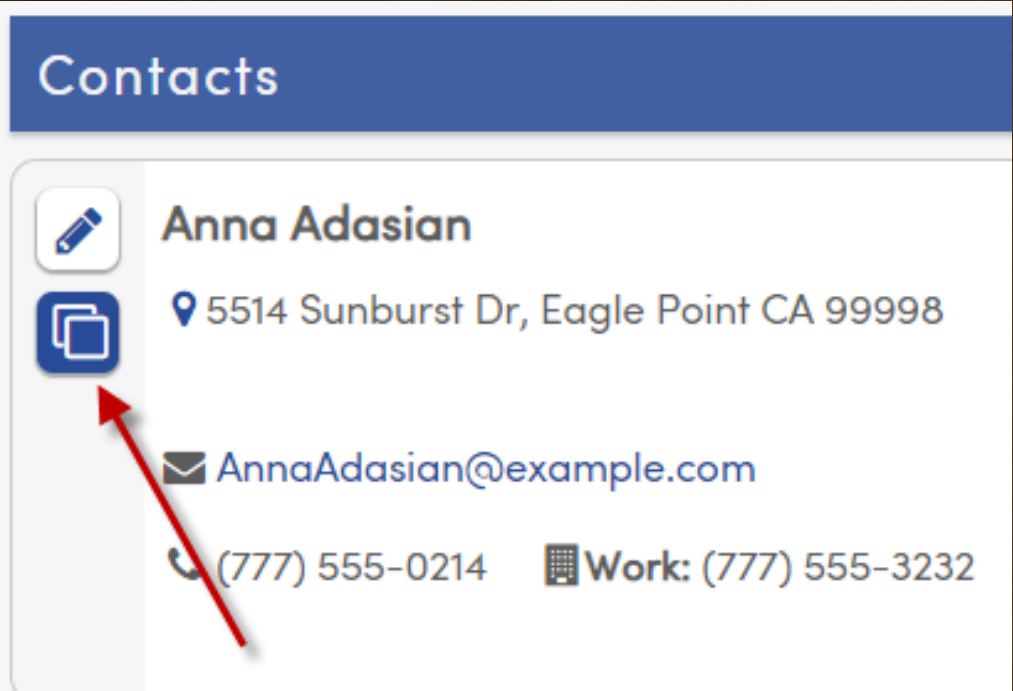
- ♦ **Portal?** If Auto Create Parent Portal Accounts is turned on, the **Email Address** and **Portal?** field used together will trigger the creation of a new Parent Portal account. If Auto Create Parent Portal Accounts is not turned on, these 2 fields have more limited functionality
  - ♦ Auto Create Portal Accounts
  - ♦ Used in Determining which Contacts will be evaluated for CALPADS
- ♦ [Aeries Documentation – Automated Portal Account Creation](#)
- ♦ **U1 to U8** fields can be used to tag contacts for whatever reason desired. Code Table setup is required for dropdown menu choices
  - ♦ Many fields dropdown choices can be setup using the Code Table.
  - ♦ The User Fields can be captions can be customized!
- ♦ [Aeries Documentation – Define Custom Captions](#)
- ♦ [Aeries Documentation – Define Custom Captions Video](#)





# Reducing Redundant Data Entry

Copy/Paste Contact records to other students/siblings



Link Contact phone numbers to the Student Demographics page-Requires enabling on your District Settings page

Parent/Guardian		Telephone	
M/M A Aadasian		Primary:	(777) 555-0214
Some College (12)		Primary Contact 1:	
		Primary Contact 2:	



# Helpful Hint and Sample Query


- Remember your Waffle Icon will assist with your Contact Table/Fields

2020-2021 Eagle Unified School District ▾ Tracey Berry ▾ ?

Contacts (New) [Flags] [Print] [Star] [Menu]

Robert Aadasian ▾ [Back] [Forward]

General Contact Add'l Info Flags 1 Programs 0 User Codes ^

	School	Golden Eagle Elementary School	Grade	6	Teacher	Haley
	Student ID	99000001	Age	12	Language Fluency	English Only
	State Student ID	0099000001	Gender	Male	CorrLng / RptgLng	English / English
	Status Tag	Active	Birthdate	5/17/2008	Interdistrict Status	

Edit Contact [Grid Icon] CON.LK

Prefix	Last Name	First Name	Middle Name	Suffix	Mailing Name	Verif Date
CON.PF	CON.LN	CON.FN	CON.MN	CON.SF	CON.NM	CON.VDT
Lives With?	Address	City	State	Zip Code	ZipExt	Address Type
CON.LW	CON.AD	CON.CY	CON.ST	CON.ZC	CON.ZX	CON.AT
Relationship	★ Primary Contact	Ed Rights Holder?	Code	Notification Preferences	Attendance Notification	Mail Tag
CON.RL	CON.PC	CON.ERH	CON.CD	CON.NP	CON.AN	CON.MT
Telephone	Work Phone	Extn	Mobile Phone	Pager	CorrLng	
CON.TL	CON.WP	CON.WX	CON.CP	CON.PA	CON.CL	
Birthdate	TB Test Status	TB Test Expiration	Fingerprint Status	Fingerprint Date		
CON.BD	CON.TB	CON.TBE	CON.FP	CON.FPD		
Email Address	Portal?	Employer Name	Employer Location	Occupation		
CON.EM	CON.AP	CON.ENM	CON.ELC	CON.OC		
User 1	User 2	User 3	User 4	User 5	User 6	User 7
CON.U1	CON.U2	CON.U3	CON.U4	CON.U5	CON.U6	CON.U7
Additional Contact 1			Additional Contact 2			
CON.CT1	CON.CN1		CON.CT2		CON.CN2	
Additional Contact 3			Additional Contact 4			
CON.CT3	CON.CN3		CON.CT4		CON.CN4	

Mother/Father Without Email

\*\*\*May need to adjust to your District Relationship codes\*\*\*

LIST STU CON STU.ID STU.LN STU.FN CON.LN CON.FN CON.EM CON.RL  
CON.RL? IF CON.EM = " " AND ( CON.RL = 10 OR CON.RL = 11 )

LIST STU CON STU.ID STU.LN STU.FN CON.LN CON.FN CON.EM CON.RL  
CON.RL? CON.LW CON.ERH CON.PC IF CON.ERH = "N" AND ( CON.RL = 10  
OR CON.RL = 11 )

LIST STU CON STU.NM STU.ID CON.FN CON.LN CON.NM CON.CD  
CON.ERH CON.PC CON.LW CON.AP CON.ELV

Remember to check our Knowledge Base Website for more helpful Queries

[Aeries Documentation – Query Bank](#)



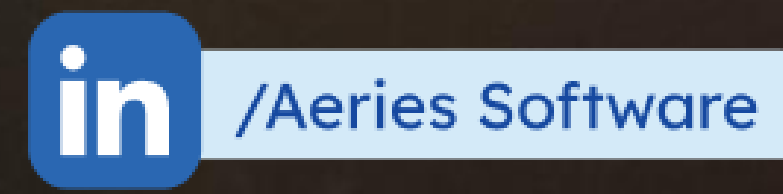
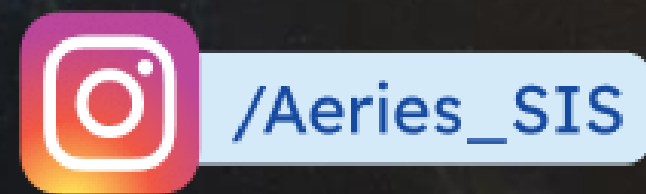
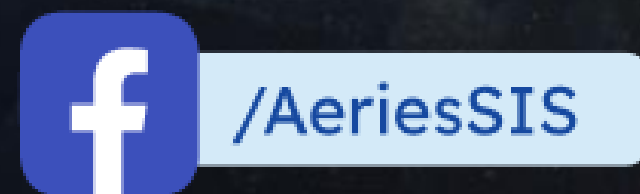
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# THANK YOU!

Please take a moment to complete our session survey.

<http://surveys.aeries.com/s3/AeriesCon-Session-Feedback-Survey-Spring-2024>



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