**Data Entry Protocol – Student Record Entry and Maintenance in Lumens June 2021**

**Duplicate Records**

When creating a new record, it is ***very important*** to check for an existing record before proceeding with the creation of a new record. Try several times using different options to make sure the record does not exist in any form, ie:

1. Enter the student’s first and last name as provided by the student, or name with one initial
2. Enter the student’s preferred name, if provided with the last name or last name initial
3. Reverse the first and last name fields
4. Enter only part of the first and last names, or only one of the names provided

If at this point you still cannot find another record, proceed with the creation of a new one.

We have a procedure for finding and correcting duplicate records. If you find one, use the most recent record for registration, if applicable.

**Creating/Updating Records**

Use the guidelines below when creating or looking at a record. As many of the records are created by the students themselves, they may need to be edited to conform to the protocols below.

**Demographics Tab**

Make sure all the fields (name, gender, DOB, Country of Birth, language at home, status, grade level, pupil number etc. are populated correctly. *NOTE*: for school aged students, the Status field holds the status of the ***parent***, not the student.

Ensure all names are capitalized (i.e. Mary Smith). Some prefixes may not be capitalized, but the main name will be – i.e. van Houte).

**Phone and Address Tab**

Enter all phone numbers available and specify type of number (day, mobile etc.)

For addresses, make sure street and city names are capitalized. If there is an apartment or unit number, use the following format: 310–2456 Montgomery Street, with the unit number, a dash, and then the street number and name. The street type can be abbreviated (Avenue-Ave, Boulevard-Blvd, Circle-Cir, Crescent-Cres, Drive-Dr, Highway-Hwy, Road-Rd, Street-St etc. (see Canada Post website for additional short forms)).

Postal codes should have all capitals with a space between the two parts: i.e. V3K 6X5

Internal Comments – any time you add a new comment to an existing profile, add it to the TOP of the box, above any comments that are already there. Use the following format: date, your initials, DVB initials of viewer and either “Approved” or “Pending”. If Approved, click the radio dial beside Yes for “Has staff approved the student profile?”

**Parent or Guardian Information, if applicable**

This tab only needs to be populated for 10-12 students.