

## **Contact Management**

<b>Reviewed Date</b>		<b>Number</b>	<i>IM0111</i>
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### **Introduction**

Contact information on a variety of professionals, agencies and groups is required for effective program delivery. A centralized database of contact information is maintained for use by all health unit programs and services. Programs and services rely upon this database for accurate and complete information.

### **Outlook Folders**

Maintenance of the database is shared by support staff across programs and services. Where possible, responsibilities for maintenance are aligned with program mandates and priority contacts.

A core set of information is maintained for each contact. Programs and services may request additional information be maintained that is unique to a category or group of contacts. Contact information is made available to all staff in a variety of formats to support the use of the information for programming.

### **Right Fax**

A centralized system for faxing contact groups is maintained in RightFax. Data entry into these systems is separate from the Outlook Folders.

### **Distribution Lists**

A centralized system for emailing groups of contacts is maintained through Outlook. Distribution lists are maintained by a designated Program Assistants in each service.

### **List Serve**

The agency has the capacity to create list serves as a way to support communication between groups of contacts. List serves are created centrally but managed by a program designate who is also a member of the list serve.

### **Purpose**

### **Legislative Authority**

### **Policy Definitions and Interpretation**

## **Policy**

### **Outlook Folder Contacts**

A centralized database of contact information will be maintained to support the delivery of agency programs and services. The database will include consistent and relevant information for each contact group or sector.

### **Access**

Contact information will be accessible to all staff.

Contact information will be shared with external parties in accordance with policy C1.010 *Sharing of Agency Contact Information*.

### **Management**

The Director of Corporate Service through the Administrative Assistant will ensure systems are in place to establish, update, maintain and share a current and complete database of agency contacts for use by all programs and services.

### **Maintenance**

For each set of contacts, a Program Assistant/Data Management Assistant is assigned primary responsibility for contact maintenance and updating. The designated Program Assistant/Data Management Assistant will establish and maintain a data dictionary for each contact group. The Program Assistant/Data Management Assistant will:

- update contact information as changes are identified
- maintain a data dictionary for each contact group
- audit the products generated from the contact folders for accuracy
- conduct a comprehensive review and updating of their respective contact groups a minimum of once per year and prior to a major mail out.

The webmaster is responsible for developing and maintaining systems for staff to access contact information in a variety of formats.

## **Procedures**

### **A. Contact Management**

1. The Administrative Assistant - Corporate Service will maintain and update a listing of Program Assistant/Data Management Assistant staff responsible for updating contact information.
2. The Administrative Assistant - Corporate Service will forward this document to the webmaster for posting to the intranet.

### **B. Contact Maintenance**

#### **Notification of errors**

A listing of the Program Assistants/Data Management Assistants responsible for contact updates is maintained by Administrative Assistant - Corporate Service and available as a link from the contact directories section of the agency intranet (see appendix 1). Staff will identify gaps, errors or changes to the information in the contact database by contacting the Program

Assistant/Data Management Assistant responsible for that group of contacts according to the following procedure:

1. Identify the individual responsible for the group of contacts.
2. Email the changes directly to that Program Assistant/Data Management Assistant
3. The Program Assistant/Data Management Assistant will confirm the requests for change are accurate and update the record as the information is received.

### **C. Contact Data Input**

1. Program Assistants/Data Management Assistants will input data into Outlook within the following folder structure: public folders/all public folders/SMDHU contacts
2. When collecting data Program Assistants/Data Management Assistants will work with community partners providing the contact information to determine if there is any confidential data that cannot to be shared outside of the health unit. The Program Assistant/Data Management Assistant will clearly flag these pieces of information in the data dictionary and the notes section of the contact.
3. Data will be entered in accordance with the data dictionary for the specific contact group. This dictionary is retained in S/Health Unit/databases/contact database/data dictionaries.
4. A minimum of once per year, the Program Assistants/Data Management Assistants will review the contact information for which she/he is responsible.
5. Records will be compared against directory listings that are maintained for other purposes by individuals outside the organization.
6. Inconsistencies will be flagged, checked and if confirmed the database will be updated accordingly.
7. Following major updates of the contact data, secretaries responsible for contact information will update the Who's Responsible document in S/health unit/databases/contact database/ Who's Responsible and notify the webmaster of a change to the document for posting to the Intranet.

### **D. Contact Use**

#### ***Reference***

1. Access to contact information is available to all staff via the intranet under directories.

#### ***Mailings, Contact Lists and More***

1. The Outlook Contacts maintained within the Public Folders can be queried directly to create mail merges, contact listings etc.
2. Prior to undertaking a mass communication, staff should:
  - Link with the Program Assistant/Data Management Assistant responsible for the contacts to determine the date of the last comprehensive review and update.
  - Determine in conjunction with the Program Assistant/Data Management Assistant if an update is warranted prior to undertaking the mass mailing or communication.
  - Plan mailing timelines in conjunction with the Program Assistant/Data Management Assistant responsible for the contact category to ensure the most up-to-date information is available.

***Related Forms***

***Related Policies***

***Final Approval Signature:*** \_\_\_\_\_

Review/Revision History:

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