

admin, student records, contact manager, video, webinar wednesday

Contact Manager

[2017-03-01_14.03_webinar_-_contact_manager_ls_gtm_.mp4](#)

Contact Manager is a tool all staff can use to track comments/contacts with students and their families. Contact lists are automatically created for teachers that have an association with the students through homeroom or as independent study supervising teachers. Quickly allows staff to note time, focus, and outcomes of any meeting with any student. In addition, there is an option to send notifications to specific individuals, regarding the specific contacts.

The **Student Engagement** feature integrated into **Contact Manager** allows a school to track any instructional sessions for any student across time. Any staff member who deals with any student can leave brief information regarding:

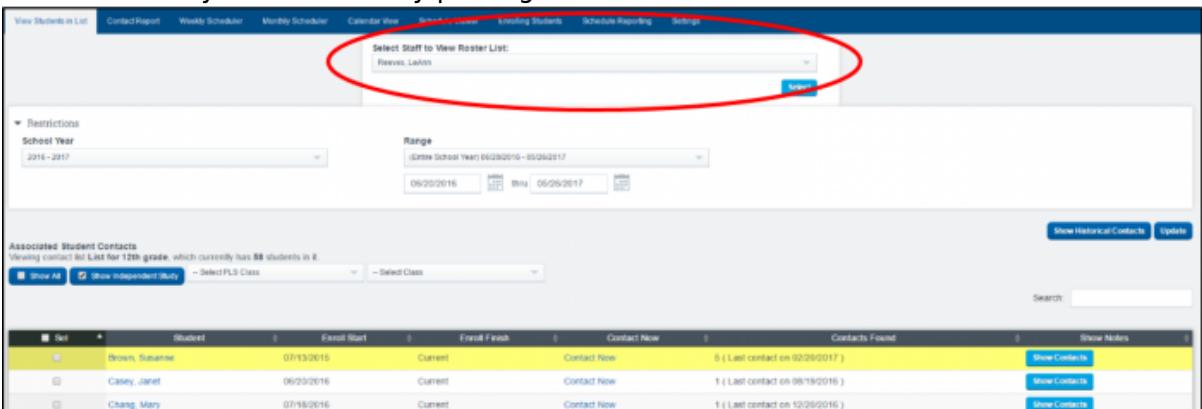
- Time spent with the student (minutes, hours). This can be documented in the past or automatically in the present.
- Any type of educational activity can be tracked: phone, in-person, class time, small group instruction, tutoring, email, etc.
- Time and subject matter information can be left for every student in a class or for an individual student.

Depending on permissions set, some users will be able to view all contact lists while others will be able to only view the homeroom teacher's/independent study teacher's contacts if they too teach the student.

Access to Contact Manager

- Contact Manager can be accessed from four vantage points:

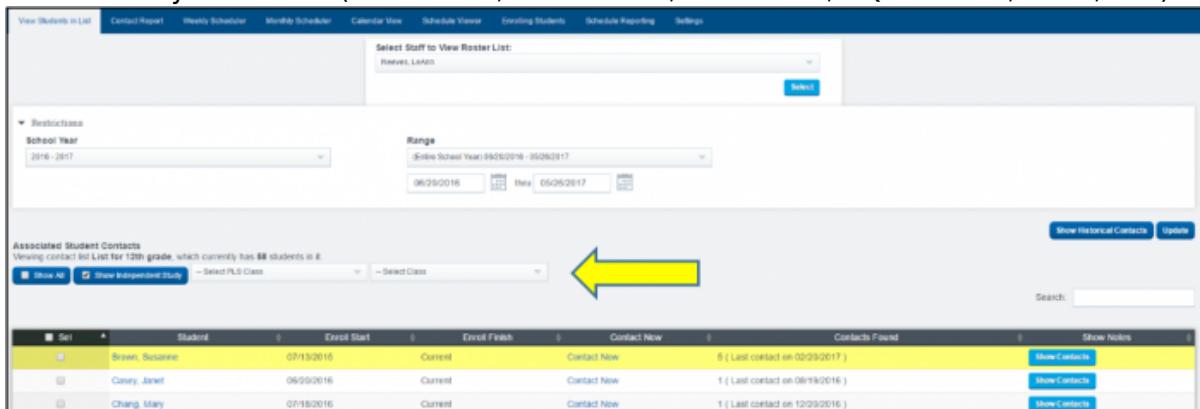
1. Administration > Student Info > Contact Manager
 1. If you enter Contact Manager via this route, you have the ability to select and view contacts for any Staff if Security privileges allow



The screenshot shows the Contact Manager application interface. At the top, there is a navigation bar with links like 'View Students in List', 'Contact Report', 'Weekly Scheduler', 'Monthly Scheduler', 'Calendar View', 'Homeroom', 'Independent Study', 'Scheduling Modules', 'Schedule Reporting', and 'Logout'. Below the navigation bar, there is a dropdown menu labeled 'Select Staff to View Roster List' with an option 'Revere, Leahs'. The main area is titled 'Associated Student Contacts' and displays a table of student contacts. The table has columns for 'Student', 'Enroll Start', 'Enroll Finish', 'Contact Now', 'Contacts Found', and 'Show Notes'. The table shows three rows of data: Brown, Susanne (enrolled from 07/13/2015 to Current, last contact on 02/25/2017); Casey, Janet (enrolled from 06/03/2016 to Current, last contact on 08/19/2016); and Chang, Mary (enrolled from 07/18/2016 to Current, last contact on 12/20/2016). At the bottom of the table, there are buttons for 'Show Contact' and 'Show Contacts'.

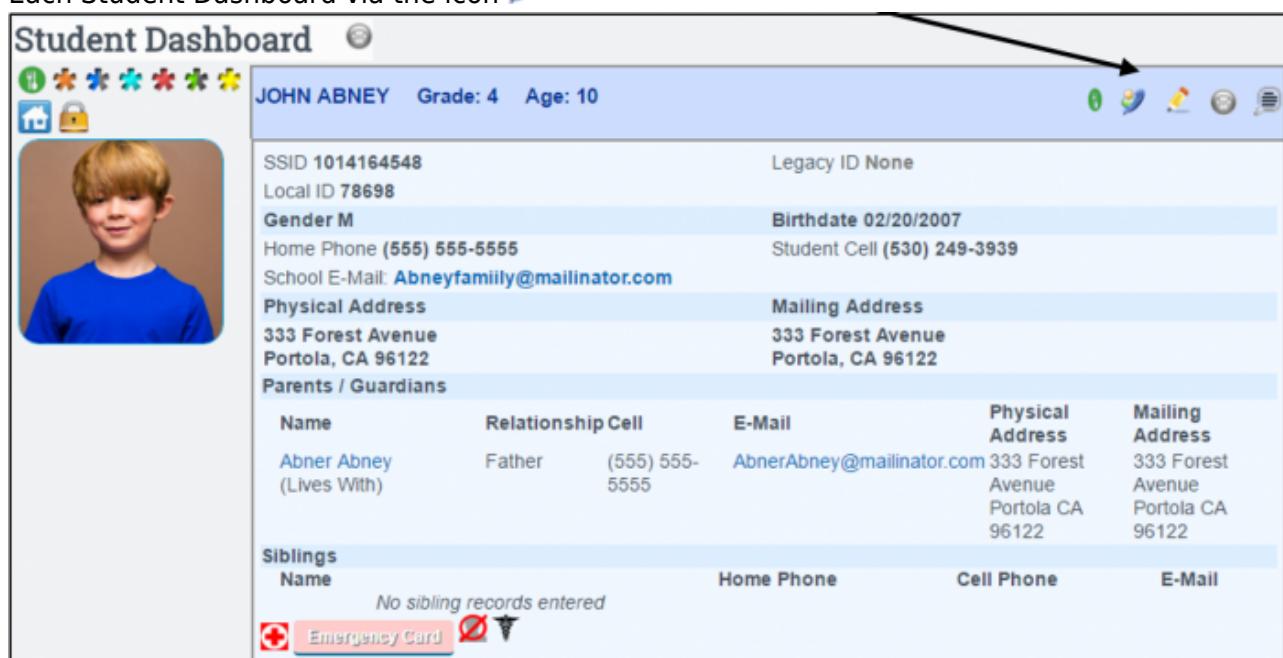
2. Teacher Pages > Contact Manager

1. If you enter Contact Manager via this route, you only have the ability to select and view contacts for your rosters (Homeroom, PLS Classes, LC Classes, HQT Classes, SPED, etc.)



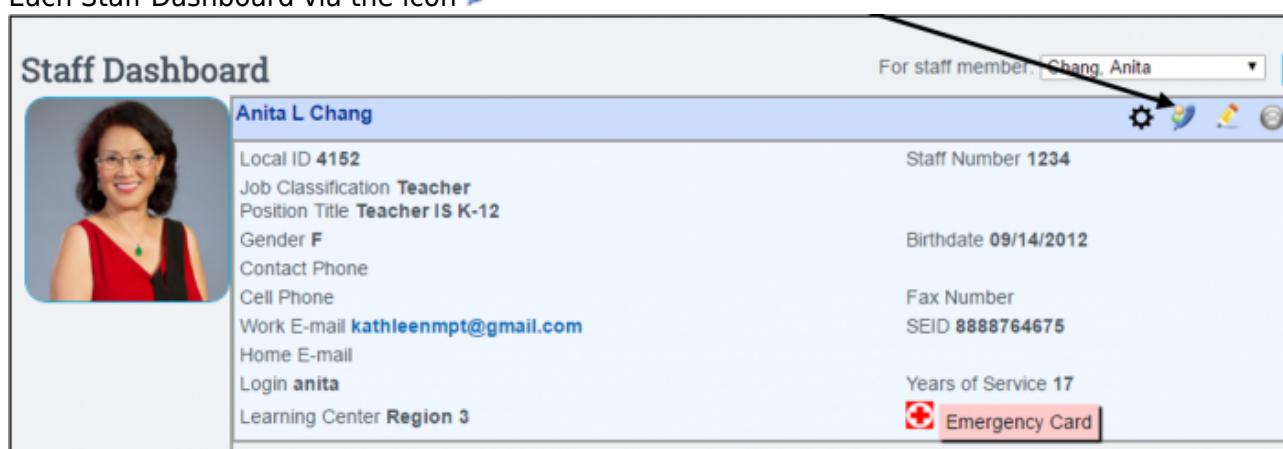
The screenshot shows the 'Contact Manager' interface. At the top, there are tabs for 'View Students in List', 'Contact Report', 'Weekly Scheduler', 'Monthly Scheduler', 'Calendar View', 'Schedule Viewer', 'Enrolling Students', 'Schedule Reporting', and 'Settings'. Below the tabs, there's a search bar labeled 'Select Staff to View Roster List' with a dropdown menu showing 'Recent, Labeled'. A yellow arrow points to a dropdown menu labeled 'Select PLS Class'. The main area displays a table with columns: 'Sel', 'Student', 'Enroll Start', 'Enroll End', 'Contact Now', 'Contacts Found', and 'Show Notes'. The table contains three rows for students: Brown, Susanna (enrolled 07/15/2016, contact now, 8 contacts); Casey, Janet (enrolled 06/20/2016, contact now, 1 contact); and Chang, Mary (enrolled 07/18/2016, contact now, 1 contact). Buttons for 'Show All' and 'Show Independent Study' are also visible.

3. Each Student Dashboard via the icon



The screenshot shows the 'Student Dashboard' for John Abney, Grade 4, Age 10. The page includes a photo of John, his SSID (1014164548), Local ID (78698), Gender (M), Birthdate (02/20/2007), Home Phone (555) 555-5555, Student Cell (530) 249-3939, School E-Mail (Abneyfamily@mailinator.com), Physical Address (333 Forest Avenue, Portola, CA 96122), Mailing Address (333 Forest Avenue, Portola, CA 96122), Parents/Guardians (Abner Abney, Father, (555) 555-5555, E-Mail: AbnerAbney@mailinator.com), and a section for Siblings (No sibling records entered). There are also buttons for 'Emergency Card' and a red 'X' icon.

4. Each Staff Dashboard via the icon



The screenshot shows the 'Staff Dashboard' for Anita L Chang. The page includes a photo of Anita, her Local ID (4152), Job Classification (Teacher), Position Title (Teacher IS K-12), Gender (F), Contact Phone, Cell Phone, Work E-mail (kathleenmpt@gmail.com), Home E-mail, Login (anita), Learning Center (Region 3), Staff Number (1234), Birthdate (09/14/2012), Fax Number, SEID (8888764675), Years of Service (17), and an 'Emergency Card' button.

Create Contacts for Selected Students

- Click “Contact Now” to create contact for individual student. Or select a group students and click the “Create Contacts for Selected Students” button.

Associated Student Contacts
Viewing contact list Childers, Cheree (Roster), which currently has 25 students in it.

Show All Show Independent Study -- Select Class

Sel	Student	Enroll Start	Enroll Finish	Contact Now	Contacts For
<input type="checkbox"/>	Bladeck, Scott	07/18/2016	Current	Contact Now	4 (Last contact on 02/28/2017)
<input type="checkbox"/>	Child, Daisy	07/18/2016	Current	Contact Now	5 (Last contact on 02/28/2017)
<input type="checkbox"/>	Howard, Bill	07/18/2016	Current	Contact Now	1 (Last contact on 02/16/2017)
<input type="checkbox"/>	Howe, Anna	07/18/2016	Current	Contact Now	
<input type="checkbox"/>	Lee, Carroll	07/18/2016	Current	Contact Now	
<input type="checkbox"/>	Lloyd, Dan	07/01/2014	06/17/2016	Contact Now	
<input type="checkbox"/>	Lloyd, Garren	07/18/2016	Current	Contact Now	
<input type="checkbox"/>	Mo, Bill	07/18/2016	Current	Contact Now	

Click “Contact Now” to create contact for individual student

Put a check mark next to student(s) name to create contact for a specific group

Create Contacts for Selected Students

- Enter all relevant information to the contact and “SAVE CONTACT”

Contact Student

Student Name: Bladeck, Scott

Add additional students:

Note: Adding additional students will create a copy of this contact per student selected. Further changes will need to be done to each contact separately.

Contacted By: Mann

Contacted For: Childers, Cheree (Roster)

If Vendor Session: Name of Vendor (optional)

Specialist Type: Administrator

Area/Subject of Focus:

Date Contacted: 02/28/2017

Beginning Time: 3:18 AM PM

End Time: AM PM

Note: If left blank when creating a new contact, the finish time is automatically set when saving the contact.

Total Time: Total time in minutes.

Contact Method?

Successfully Made Contact? Yes No

Follow up Required? Yes

Notes:

Save Contact

Send Notification Flag: -- SELECT --



NOTE: Information relevant to the student is available by expanding the blue arrow

Contact Student			
Student Name: Bladeck, Scott		Student Information Household Information Bladeck, Pearl (Mother) 234 Bend Ave Blairsden, CA 96103 Home Phone: Work Phone: Cell Phone: Email: pbladeck@mailinator.com	
Add additional students:		<input type="text"/> Add Student	
<p>Note: Adding additional students will create a copy of this contact per student selected. Further changes will need to be done to each contact separately.</p>			
Contacted By: leann			
Contacted For: Childers, Cheree (Roster)			
If Vendor Session: Name of Vendor (optional)		<input type="button" value="Choose"/>	
Specialist Type: Administrator			
		Class Information	

- After your contact is saved, you can return to your roster to view all contacts. Click the "Show Contacts" box to expand and view/read any contacts made for any student. Contacts may be printed for individual student or a group of selected students.

Associated Student Contacts
Viewing contact for Childers, Cheree (Roster), which currently has 25 students in it.

Range: Manually Specified
06/20/2016 thru 05/26/2017

Student	Enroll Start	Enroll Finish	Contact Now	Contacts Found	Show Notes
Bladeck, Scott	07/18/2016	Current	Contact Now	4 Last contact on 02/28/2017	Show Contact
Child, Darsy	07/18/2016	Current	Contact Now	5 Last contact on 02/28/2017	Show Contact
Howard, Bill	07/18/2016	Current	Contact Now	1 Last contact on 02/16/2017	Show Contact
Howe, Anna	07/18/2016	Current	Contact Now		Show Contact
Lee, Carroll	07/18/2016	Current	Contact Now		Show Contact
Lloyd, Dan	07/01/2014	06/17/2016	Contact Now		Show Contact
Lloyd, Garen	07/18/2016	Current	Contact Now		Show Contact
Mo, Bill	07/18/2016	Current	Contact Now		Show Contact

[Create Contacts for Selected Students](#) [Print Contacts for Selected Students](#) [Export CSV for Selected Students](#)

Showing 5 contacts for Child, Darsy made between 06/20/2016 and 05/25/2017

#	Creator	Met With	Contact Method	Date	Start	Finish	Duration	Flag	Edit	Note
1	Reeves, LeAnn (team)	LeAnn	Yellow Phone	02/28/2017	12:07 pm	-		Yellow	Edit	Student did not attend monthly meeting. Please call teacher to discuss.
2	Reeves, LeAnn (team)	LeAnn	Yellow Phone	02/27/2017	2:09 pm	-		Yellow	Edit	Student did not attend English tutoring today. Missing several assignments. Please call teacher to schedule a meeting to discuss class attendance issues.
3	Reeves, LeAnn (team)	LeAnn	Green Phone	02/23/2017	8:40 am	8:41 am	1 minutes	Green	Edit	Test
4	Reeves, LeAnn (team)	LeAnn	Yellow Phone	02/23/2017	3:31 pm	-		Yellow	Edit	Missing classes
5	Reeves, LeAnn (team)	LeAnn	Yellow Phone	02/23/2017	8:56 am	-		Red	Edit	TEST

[Edit contact information](#) [Print contacts per student](#)

GREEN: successful contact
RED: unsuccessful contact
YELLOW: needs follow-up

Administrative Contact Report

- This report is used to view contacts for a specific date range, Teacher, Student, and Vendor Staff, and more. Various filters are available to pull a report of contacts that have been logged within Contact Manager.
- To access, click the gray Contact Report tab > Select dates & filters > Show Report

View Students in List Contact Report Weekly Scheduler Monthly Scheduler Calendar View Schedule Viewer Enrolling Students Schedule Reporting Settings

Contact Manager Report

▼ Restrictions

Learning Center
0 Selected (defaults to all)

School Year
2016 - 2017

Range
– Manually Specified –
06/20/2016 thru 02/28/2017

▼ Other Options

Export
CSV

Show Zero Duration
Show contacts with zero duration and/or contacts failed to be made

Display Type
All Students

Teacher Student Met With
-- All --

Assigned Teacher
-- All --

Student
-- All --

Vendor Staff
1 Selected

Subject or Area of Focus
-- All --

Contact Method
-- All --

Note Search

View Report								
Student Name	Contact Date	Contact Time	Total Time	Contact Method	Met with	Type	Area/Subject	Notes
Abney, John	07/19/2016	9:16 am	1 minutes	Online Meeting/Digital Contact	Reeves, LeAnn	9-12 English Tutor	Mathematics	Student needs to attend weekly tutoring session to get help with math work. Student is falling behind.
	07/19/2016	10:18 am	12 minutes	In-Person	Reeves, LeAnn	9-12 English Tutor	Mathematics	Met to discuss math class.
	07/19/2016	10:35 am	40 minutes	In-Person	Reeves, LeAnn	9-12 English Tutor	Mathematics	John needs to attending tutoring sessions regarding math. Please schedule time with tutor.
	07/19/2016	10:46 am	1 hour and 0 minutes	Online Meeting/Digital Contact	Reeves, LeAnn	9-12 English Tutor	Mathematics	Student needs to attend tutoring session.
Abney, Kristen	11/05/2016	1:14 pm	55 minutes		Reeves, LeAnn	9-12 English Tutor		
Abney, Tamara	02/20/2017	2:55 pm	5 minutes		Reeves, LeAnn	9-12 English Tutor		test/test/test
Alton, Christian	11/10/2016	9:12 am	—		Schlegel, Lindsey	9-12 English Tutor		Test for email
Atoca, Jessica	02/20/2017	2:55 pm	5 minutes		Reeves, LeAnn	9-12 English Tutor		test/test/test
Ashcroft, August	07/22/2016	9:09 am	1 hour and 0 minutes	In-Person	Reeves, LeAnn	Math Tutor	Mathematics	
Ayers, Ashton	11/04/2016	11:51 am	1 hour and 0 minutes	At School Site	Reeves, LeAnn	9-12 English Tutor	Monthly Mtg #2	Student is turning in minimal work. Struggling with several of his classes. In danger of academic failure.
Baily, George	10/11/2016	8:24 am	1 hour and 0 minutes	In-Person	Chang, Anita	9-12 English Tutor	Monthly Mtg #1	Met to discuss LP 4 work. Student turned in work for LP 3. Review math work and discussed setting up regular weekly tutor sessions. Gave student updated APR.
	10/21/2016	8:27 pm	—	Phone	Chang, Anita	9-12 English Tutor	Mathematics	Called parent to discuss math progress and setting up weekly tutoring sessions. Left a VM.
	10/24/2016	8:28 pm	—	At School Site	Chang, Anita	9-12 English Tutor	Mathematics	Student did not attend on site math class.
	11/03/2016	9:20 am	1 hour and 0 minutes	At School Site	Chang, Anita	9-12 English Tutor	Mathematics	Met to go-over math concepts. Will be meeting with me weekly to do math tutoring.

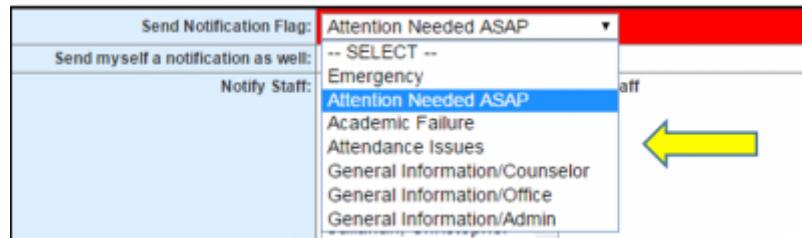
How Do I Send Contact Manager Notifications?

- When creating a contact in Contact Manager, you may send a notification to selected staff members and/or parents of the student, regarding the nature of the contact that is being created.

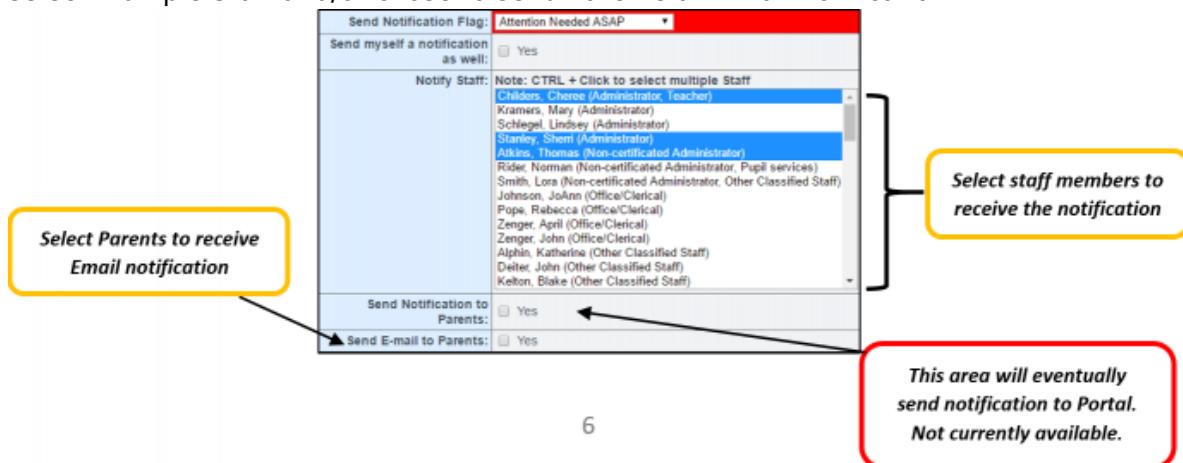
Recent Pages ▾ Enter search text Students

59

- Staff members will have notification flags appear next to the profile picture at the top of right of the SIS
 - Color of the flag indicates level of importance or priority of notification (Emergency, Attention Needed, Academic Failure, General Information)
- Sending a notification
 1. Create contact as described in steps above and enter all relevant information
 2. Prior to saving contact, select type of "Notification Flag" from the drop-down box. Once the flag is selected the color of flag will be displayed (Example: "Attention Needed ASAP" is highlighted red)



3. Select staff members to notify. Multiple staff may be selected by holding CTRL + Click to select multiple Staff and/or chose to send Parents an Email notification.



4. SAVE Contact

5. Once the contact is saved and you "Show Contacts" for a specific student "Notification Flag Information" the flag notification sent will be noted. You can also clicking on "Edit" of contact saved

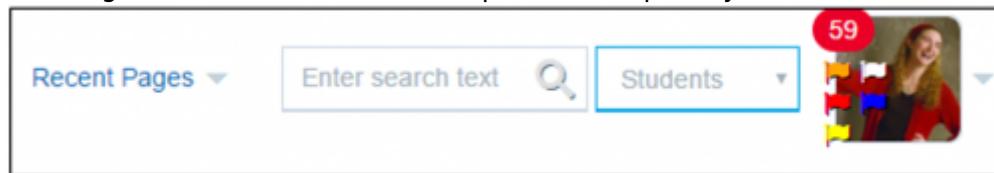
#	Creator	Met With	Contact Method	Date	Start	Finish	Duration	Flag	Edit
1	Reeves, LeAnn (leann)	leann	●	02/28/2017	12:07 pm	-	-	■	[Edit] Student did not attend monthly meeting. Please call teacher to discuss.
2	Reeves, LeAnn (leann)	leann	● At School Site	02/27/2017	2:09 pm	-	-	■	[Edit] Student did not attend English tutoring today. Missing several assignments.
3	Reeves, LeAnn (leann)	leann	● Phone	02/23/2017	8:40 am	8:41 am	1 minutes	■	[Edit] Test
4	Reeves, LeAnn (leann)	leann	● Phone	02/23/2017	3:31 pm	-	-	■	[Edit] Missing classes
5	Reeves, LeAnn (leann)	leann	● Phone	02/23/2017	8:56 am	-	-	■	[Edit] TEST

Details of notifications sent are included within the specific contact for which it was attached

Notification Flag Information			
Flag	Description	Notification Recipient	Date Sent
■	Attention Needed ASAP	Staff: Ashton, Taryn	Mon Jul 13, 2015 - 2:02 pm
■	Attention Needed ASAP	Staff: Boyd, Danice	Mon Jul 13, 2015 - 2:02 pm
■	Attention Needed ASAP	Staff: Brenneman, Kathleen	Mon Jul 13, 2015 - 2:02 pm
■	Attention Needed ASAP	Staff: Childers, Cheree	Mon Jul 13, 2015 - 2:02 pm

- Where will staff see the notifications they have received?

1. Staff members will have flags next to the notifications envelope count in the blue header of the SIS to show nature of notification
2. Color of the flag will indicate level of the importance or priority of notification

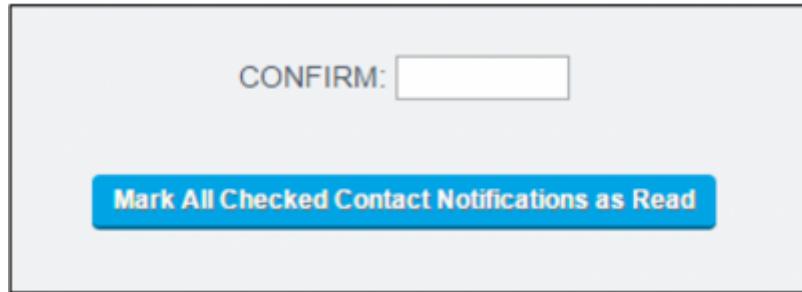


- Hover over the flag for a brief description

3. Click directly on the flag to read notification

From	Sent By	Subject	Message	Flag	Student
02/27/2017 11:28 am	Reeves, LeAnn (deann)	Contact Notification: Attendance Issues	A Contact was created with the following note: TEST AGAIN 2/28/17		Bladock, Scott
02/27/2017 2:10 pm	Reeves, LeAnn (deann)	Contact Notification: Attendance Issues	A Contact was created with the following note: Student did not attend English tutoring today. Missing several assignments. Please call teacher to schedule a meeting to discuss class attendance issues. Message sent by Reeves, LeAnn For student: Daily Child		Child, Daily

4. To mark the notification as Read, click the box to the left of the notification, typing CONFIRM, and clicking "Mark All Checked Contact Notifications as Read". The Date and time read will be noted.



Administration: Set Up Notification Flags

1. To set-up notification flags go to Administration > Settings > Trigger Emails
2. Click on the "Notification Flags" tab

Email Notifications		Notification Flags		Event Triggers	
Icon	Description	Color	Edit		
	Emergency	Pink	Edit		
	Attention Needed ASAP	Red	Edit		
	Academic Failure	Orange	Edit		
	Attendance Issues	Yellow	Edit		
	General Information/Counselor	White	Edit		
	General Information/Office	Blue	Edit		
	General Information/Admin	Lime	Edit		

[Add New Flag](#)



3. You may "Edit" the default flags that are available or.....
4. Click "New Flag", enter flag description, select color, and "Save Flag Settings"

Notifications & Flagging - Create New Flag

Flag Description:	<input type="text"/>
Flag Color:	<input type="button" value="Aqua"/>
<input type="button" value="Back"/>	<input type="button" value="Save Flag Settings"/>

Administration: Set Up Vendors

- Go to Administration > Portal Management > Vendors
- You can set-up vendors that will be providing services to students, so that staff that have access to Contact Manager for student can enter information related to the Vendor Session with the student(s). Once vendor names are entered, they will be available for selection from a drop down box when entering contact information.

Contact Student	
Student Name:	Brown, Susanne
Add additional students:	<input type="text"/> <input type="button" value="Add Student"/> <p>Note: Adding additional students will create a copy of this contact. Changes need to be done to each contact separately.</p>
Contacted By:	leann
Contacted For:	List for 12th grade
If Vendor Session: Name of Vendor (optional)	<input type="text" value="-- Choose --"/> <input type="text" value="-- Choose --"/> Caswell, James (Math Tutor) 
Specialist Type	Atkins, Thomas (Driving Instructor)
Area/Subject of Focus:	Howard, Bill (Driving Instructor)
Date Contacted:	Schwartz, George (Occupational Therapist)
Beginning Time:	Howard, Sue (Tutors 6-8 Students)
	Howard, Bill (9-12 English Tutor)
	Jones, Sue (Math Tutor)

1. Click "Add New Vendor" and enter all necessary information and click "SAVE"

List of Vendors							
Vendor Name	Category	Vendor Type	State	County	Edit	View Staff	
Almond Country Famrs		External	CA	Butte	<input type="button" value="Edit"/>	Show Staff: <input type="checkbox"/>	
English Tutor ABC	English Tutor	External	CA	Sierra	<input type="button" value="Edit"/>	Show Staff: <input type="checkbox"/>	
Math Tutors, Inc.	Tutor	External	CA	Plumas	<input type="button" value="Edit"/>	Show Staff: <input type="checkbox"/>	
Milestone Academy		School	CA		<input type="button" value="Edit"/>	Show Staff: <input type="checkbox"/>	
Occupational Speech Services	Speach Services	External	CA	Plumas	<input type="button" value="Edit"/>	Show Staff: <input type="checkbox"/>	
XYZ Driving School	Vendor Classes	External	CA	Plumas	<input type="button" value="Edit"/>	Show Staff: <input type="checkbox"/>	

After you have edited your Vendor List, you should send them to ReportWriter.
 (so that the vendors can appear on the Master Agreement)

2. Click to "Show Staff" and then click "Add New Staff" to add name of staff providing the vendor services

Vendor Name	Category	Vendor Type	State	County	Edit	View Staff	
Almond Country Famrs		External	CA	Butte	<input type="button" value="Edit"/>	Show Staff: <input type="checkbox"/>	
English Tutor ABC	English Tutor	External	CA	Sierra	<input type="button" value="Edit"/>	Show Staff: <input checked="" type="checkbox"/>	
	Staff Name	Specialist Type	Contacts	Edit			
	Howard, Bill	9-12 English Tutor	1	<input type="button" value="Edit"/>			
	Howard, Sue	Tutors 6-8 Students	0	<input type="button" value="Edit"/>			
				<input type="button" value="Add New Staff"/>			

Administration: Contact Manager School Policies

- Schools have the ability to customize the options in the drop downs for "Area/Subject of Focus" and "Contact Method"

Student Name:	Bladeck, Scott	<input type="button" value="Add Student"/>
Add additional students:		
<p>Note: Adding additional students will create a copy need to be done to each contact separately.</p>		
Contacted By:	leann	
Contacted For:	Childers, Cheree (Roster)	
If Vendor Session: Name of Vendor (optional)	-- Choose --	
Specialist Type	Administrator	
Area/Subject of Focus:	-- Choose --	
Date Contacted:	03/01/2017	<input type="button" value=""/>
Beginning Time:	1:01	<input type="radio"/> AM <input checked="" type="radio"/> PM
End Time:		<input type="radio"/> AM <input type="radio"/> PM
<p>Note: If left blank when creating a new contact, the</p>		
Total Time:	Total time in minutes.	
Contact Method?	-- Choose --	

- Access School Policies via Admin > Settings > Policies > Contact Manager – click to show policies
- See policies #8 and #9. Enter custom list with no commas or spaces. Then “Set Preferences”

8. What options can be selected for Contact Method? (contactmethodoptions)	Please set which options can be set for Contact Method in the text field. They must be comma delimited.	
<input type="checkbox"/> All <input type="checkbox"/> Phone E-mail In-Person At S		
9. What options can be selected for Area/Subject of Focus? (contactareasubjectoptions)	Please set which options can be set for Area/Subject of Focus in the text field. They must be comma delimited.	
<input type="checkbox"/> All <input type="checkbox"/> Monthly Mtg #1 Monthly Mtg		



Contact Manager Upload

Schools now have the ability to do an upload of data into Contact Manager by uploading a CSV file containing contact log information.

The Contact Manager upload tool can be found at **Reports > Students > Contact Manager Upload**

Admin	Reports	Sites	Teachers	Portal	Help
Create-A-Report					
Finder			Class Rank Errors		Comprehensive Student List
Attendance	▶		Contact Manager Schedule Report		Contact Manager Upload
Barcode	▶		Counseling Session Report		Dropouts
Crossed Records	▶		Enrollments in AP Classes		Enrollments in Advanced Math/Science
Enrollment	▶		Golden State Seal Merit Diploma		HS Graduates
Export	▶		Immunization Compliance		Immunizations Report
External Bridging	▶		Public Registration		Referral Report
Scheduler	▶		Student Summary		Students w/o Parent/Guardians
School	▶		Withdrawals		
Staff	▶		▼ Special Programs		
State/Federal	▶				
Students	▶				

You will need to create a CSV file with the column headers pictured below. The **Red** fields are required for a successful load, while the others are optional. Once you have the file ready to upload, click on the Choose File button, browse for the file on your computer, select the file, then click the blue Import button.

• **General Header Notes:**

- **Student ID:** Local ID or **Student Number** - Legacy/External ID
- **Contacted By:** Username of the person that is doing the upload and pushing the upload button Example: jdoe
- **Contacted For:** The staff member for which you are loading contacts. It could be the Homeschool Teacher, Counselor, yourself, etc. Spell out the staff name in the following format: Last Name, First Name. This will tag the Staff Name in the log for the student under “Contacted For”.
- If there is a **Duration** entered, there is no need to enter **Finish Time**. Only **Start Time** is required.
- IF there is **NO Duration** entered then you would need to have both a **Start Time** and **Finish Time**. The Duration will then be populated on load.



Contact Manager Upload

Example data (red fields are required):

Student ID *	Scope	Contacted By	Contacted For	Date	Start Time	Made Contact?	Subject	Finish Time	Duration (in minutes)	Contact Method	Contact Method Other	Follow Up Required?	Note	Vendor Name	Specialist
123456	milestone	jdoe	Doe, John	1/02/2003	2:00 PM	Yes	Spelling and Handwriting	3:00 PM		Phone			Student was doing fine		
123456	milestone	jdoe	Smith, Sally	1/02/2003	1300	Yes	Electives		30	Other	Ran into student at the grocery store	Yes			

* If this header is instead "Student Number", you can use the student's number instead of their ID.

Once the import is complete you will receive a Results page indicating the status of the load, indicating successfully loaded records as well as any errors encountered during the load.

Contact Manager Upload Results

Color Key
Successfully loaded
Unrecognized column name
Duplicate column name
Error

Load completed

Student ID	Scope	Contacted By	Contacted For	Date	Start Time	Made Contact?	Subject	Finish Time	Duration (in minutes)	Contact Method	Contact Method Other	Follow Up Required?	Note	Vendor Name	Specialist	Completion Status
78897	milestone	leann	Childers, Cheeze	4/25/2018	3:00 PM	Yes	English	60	Phone				Discussed progress on English essay			Success
79009	milestone	leann	Childers, Cheeze	4/25/2018	2:00 AM	Yes	Electives	00	Email		Yes		Shared a list of CTE Class options			For line #3, contact method 'Email' does not match any existing methods, and no method 'other' was sent. skipping
79081	milestone	leann	Childers, Cheeze	4/25/2018	10:00 AM	Yes	Math	60	Phone				Student will be attending tutoring weekly			Success

Sample Upload:

Student ID	Scope	Contacted By	Contacted For	Date	Start Time	Made Contact?	Subject	Finish Time	Duration (in minutes)	Contact Method	Contact Method Other	Follow Up Required?	Note
78897	milestone	leann	Childers, Cheeze	4/25/2018	3:00 PM	Yes	English		60	Phone			Discussed progress on English essay
79009	milestone	leann	Childers, Cheeze	4/25/2018	9:00 AM	Yes	Electives		30	Email		Yes	Shared a list of CTE Class options
79081	milestone	leann	Childers, Cheeze	4/25/2018	10:00 AM	Yes	Math		60	Phone			Student will be attending tutoring weekly

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