

[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.

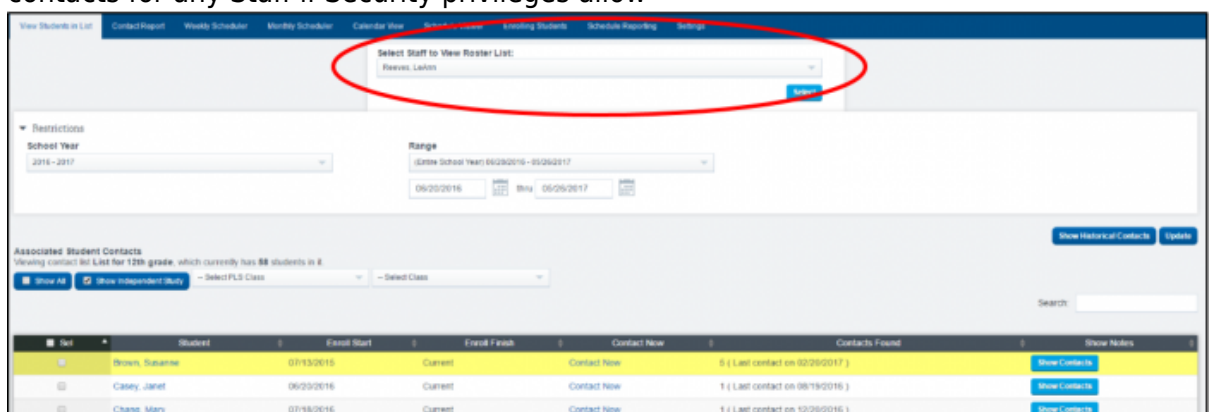
Depending on permissions set, some users will be able to view all contact lists while others will be able to only view the homeroom teacher's/independent study teacher's contacts if they too teach the student.

## Access to Contact Manager

- Contact Manager can be accessed from four vantage points:

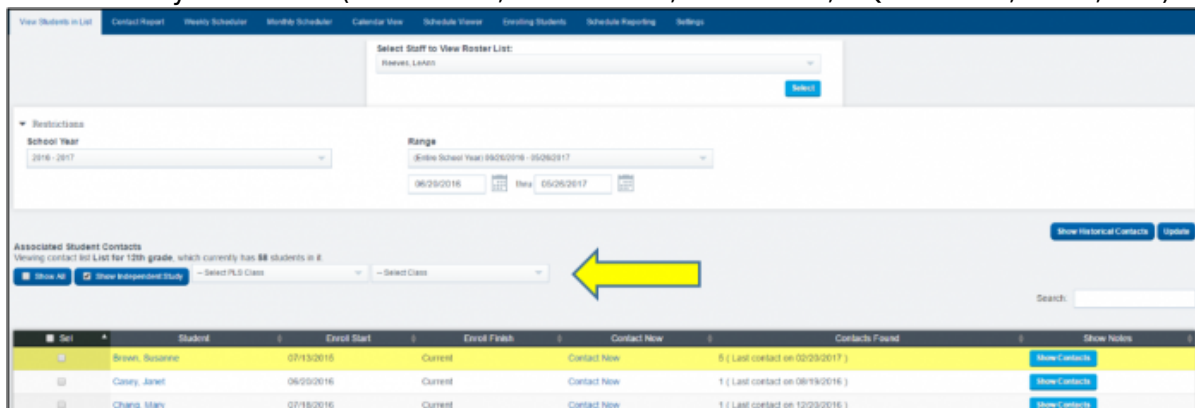
### 1. Administration > Student Info > Contact Manager

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

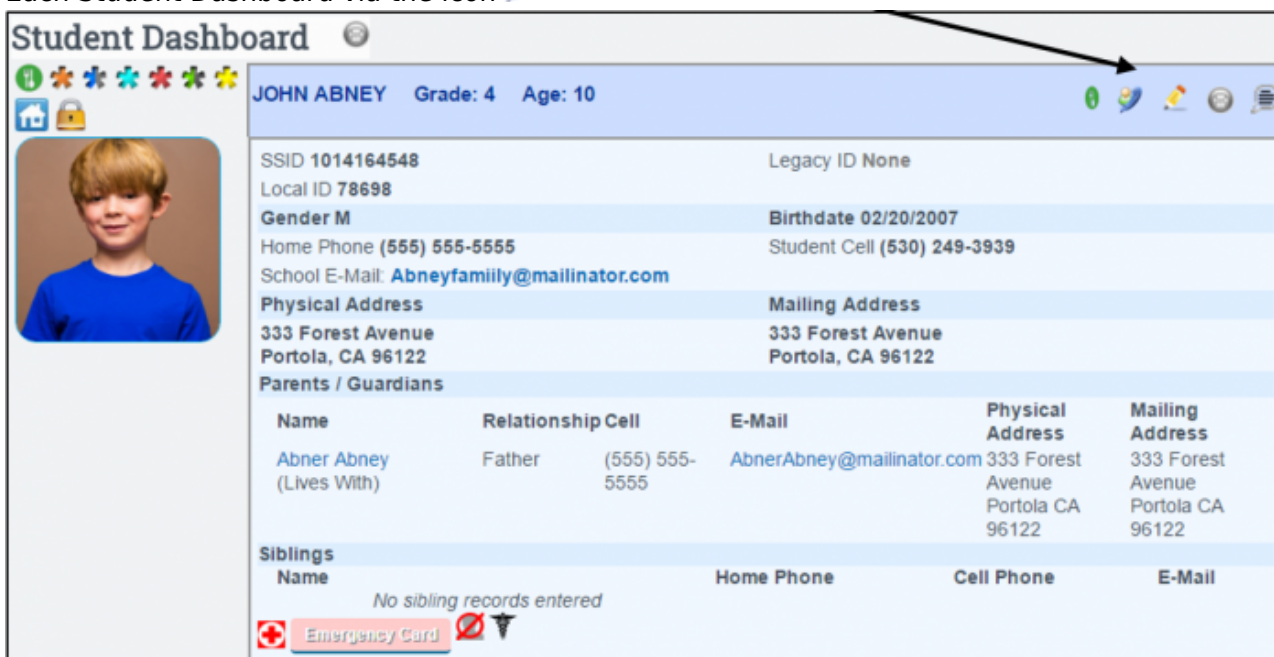


2. Teacher Pages > Contact Manager

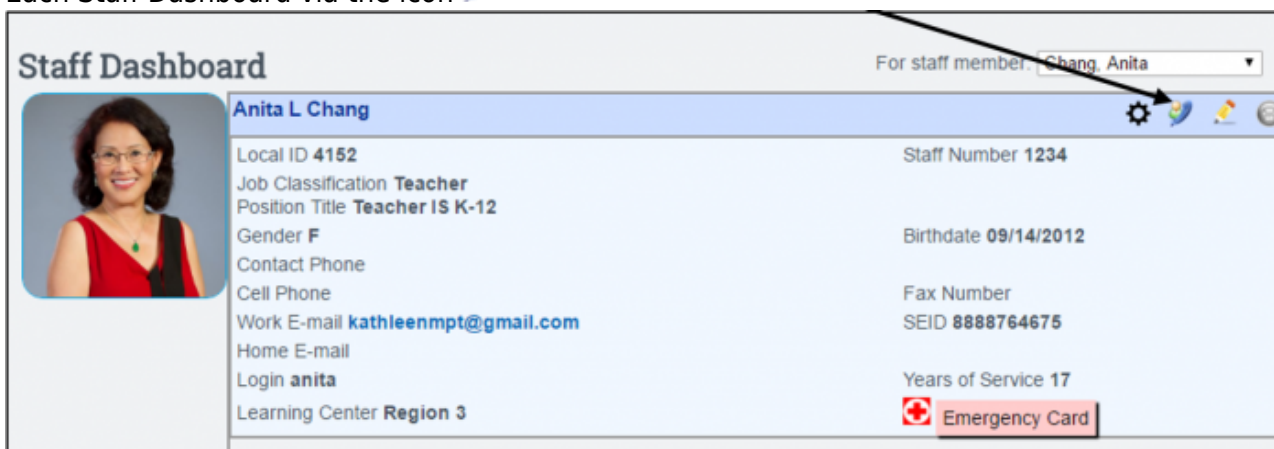
1. If you enter Contact Manager via this route, you only have the ability to select and view contacts for your rosters (Homeroom, PLS Classes, LC Classes, HQT Classes, SPED, etc.)



3. Each Student Dashboard via the icon



4. Each Staff Dashboard via the icon



# 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

Set	Student	Enroll Start	Enroll Finish	Contact Now	Contacts Found
<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, Carol	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	

Create Contacts for Selected Students

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

- Enter all relevant information to the contact and "SAVE CONTACT"

Contact Student

Student Name: Bladeck, Scott

Add additional students: Add Student

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: leann

Contacted For: Childers, Cheree (Roster)

If Vendor Session: Name of Vendor (optional): -- Choose --

Specialist Type: Administrator

Area/Subject of Focus: -- Choose --

Date Contacted: 02/28/2017

Beginning Time: 3:18 AM

End Time: AM

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?: -- Choose --


Successfully Made Contact? Yes No

Follow up Required? Yes

Notes:

Send Notification Flag: -- SELECT --

Save Contact

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

- 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.

Student	Enroll Start	Enroll Finish	Contact Now	Contacts Found
Bladeck, Scott	07/18/2016	Current	Contact Now	4 ( Last contact on 02/28/2017 )
Chae, Daisy	07/18/2016	Current	Contact Now	5 ( Last contact on 02/28/2017 )
Howard, Bill	07/18/2016	Current	Contact Now	1 ( Last contact on 02/16/2017 )
Hove, Anna	07/18/2016	Current	Contact Now	
Lee, Candis	07/18/2016	Current	Contact Now	
Lloyd, Dan	07/01/2014	06/17/2016	Contact Now	
Lloyd, Garnet	07/18/2016	Current	Contact Now	
Mo, Bill	07/18/2016	Current	Contact Now	

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

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

**Edit contact information**

**Print contacts per student**

## 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

### Contact Manager Report

▼ Restrictions

**Learning Center**  
0 Selected (defaults to all) ▼

**School Year**  
2016 - 2017 ▼

**Range**  
-- Manually Specified --  
06/20/2016 [calendar icon] thru 02/28/2017 [calendar icon]

▼ 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**

Student Name	Contact Date	Contact Time	Total Time	Contact Method	Met with	Type	Area/Subject	Notes
Aboey, 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 attend tutoring sessions regarding math. Please schedule time with tutor.
	07/19/2016	10:45 am	1 hour and 0 minutes	Online Meeting/Digital Contact	Reeves, LeAnn	9-12 English Tutor	Mathematics	Student needs to attend tutoring session.
Aboey, Kristen	11/09/2016	1:14 pm	35 minutes		Reeves, LeAnn	9-12 English Tutor		
Aboey, Tamara	02/20/2017	2:35 pm	5 minutes		Reeves, LeAnn	9-12 English Tutor		test/tester
Alum, Christian	11/10/2016	9:12 am	--		Schwartz, Lindsey	9-12 English Tutor		Test for email
Alcala, Jessica	02/20/2017	2:55 pm	5 minutes		Reeves, LeAnn	9-12 English Tutor		test/tester
Auhoff, 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.
Baty, 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 AWR.
	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 vtr.
	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 the 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.

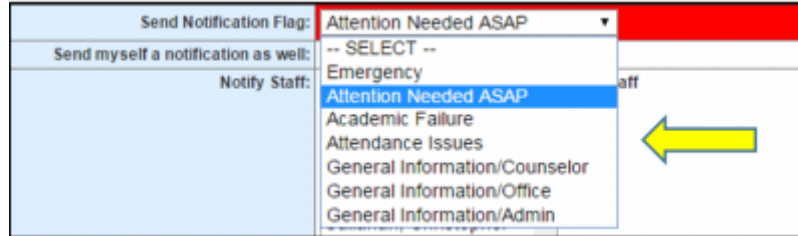
Recent Pages ▼

Enter search text 🔍

Students ▼

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- 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.

**Select Parents to receive Email notification**

**Select staff members to receive the notification**

**This area will eventually send notification to Portal. Not currently available.**

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

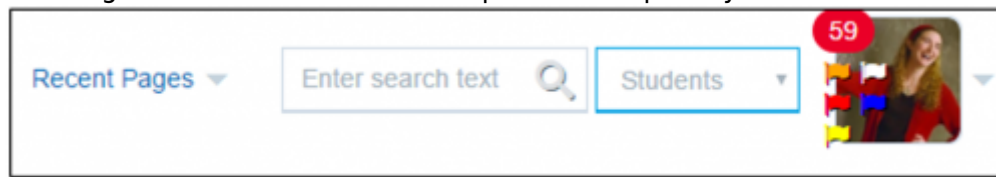
#	Creator	Met With	Contact Method	Date	Start	Finish	Duration	Flag	Edit	Description
1	Reeves, LeAnn (leann)	leann		02/28/2017	12:07 pm	-	-		[Edit]	Student did not attend monthly meeting. Please call teacher to discuss.
2	Reeves, LeAnn (leann)	leann	At School Site	02/27/2017	2:09 pm	-	-		[Edit]	Student 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**

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?

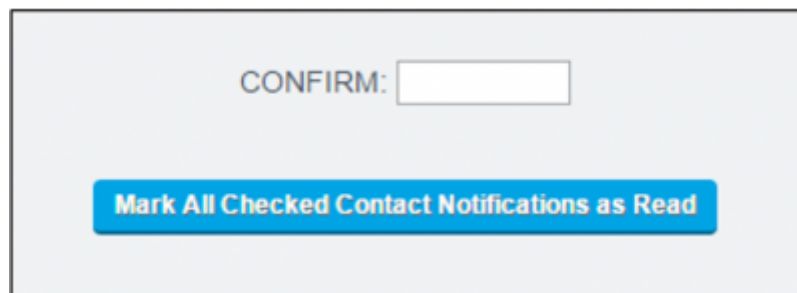
1. Staff members will have flags next to the notifications envelope count in the blue header of the SIS to show nature of notification
2. Color of the flag will indicate level of the importance or priority of notification



- Hover over the flag for a brief description
3. Click directly on the flag to read notification









Send	Sent By	Subject	Message	Flag	Student
02/27/2017 11:28 am	Reeves, LeAnn (Joanne)	Contact Notification: Attendance Issues	A Contact was created with the following note: TEST AGAIN 2/28/17 Message sent by Reeves, LeAnn For student: Scott Blackbeck	🚩	Blackbeck, Scott
02/27/2017 2:10 pm	Reeves, LeAnn (Joanne)	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: Daisy Child	🚩	Child, Daisy

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	<a href="#">Edit</a>		
	Attention Needed ASAP	Red	<a href="#">Edit</a>		
	Academic Failure	Orange	<a href="#">Edit</a>		
	Attendance Issues	Yellow	<a href="#">Edit</a>		
	General Information/Counselor	White	<a href="#">Edit</a>		
	General Information/Office	Blue	<a href="#">Edit</a>		
	General Information/Admin	Lime	<a href="#">Edit</a>		
<a href="#">Add New Flag</a>					

- 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="text" value="Aqua"/>



[Back](#) [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.





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

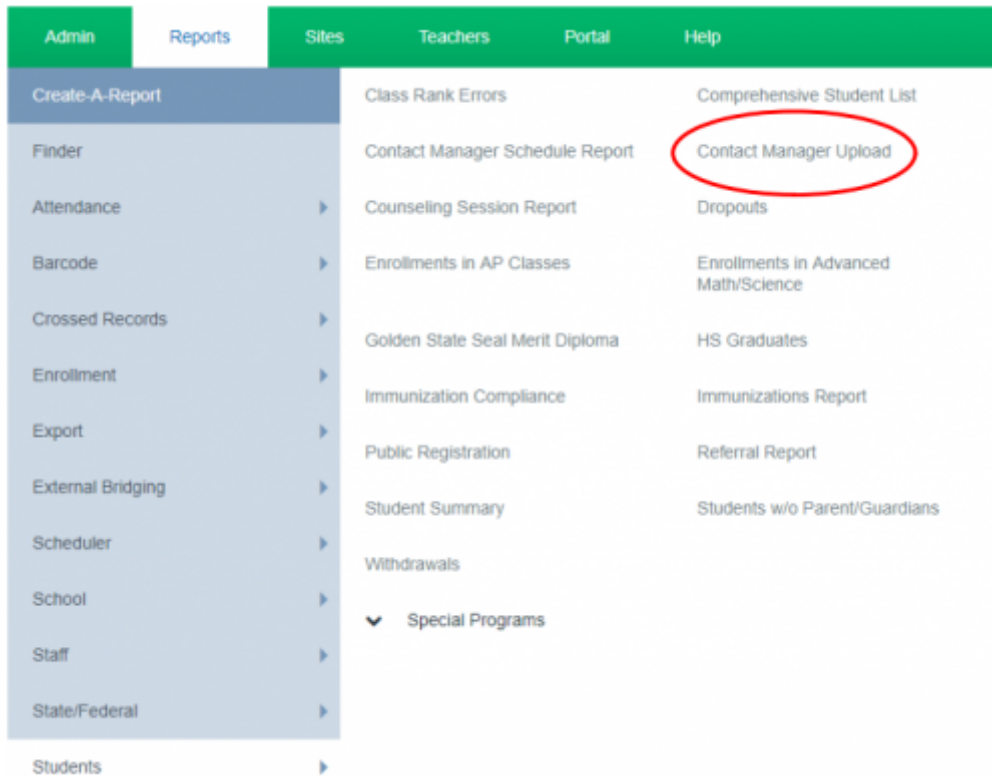
8. What options can be selected for Contact Method? (contactmethodoptions)	Please set which options can be set for Contact Method in the text field. They must be comma delimited	All Phone, Email, In Person, All S
9. What options can be selected for Area/Subject of Focus? (contactareasubjectoptions)	Please set which options can be set for Area/Subject of Focus in the text field. They must be comma delimited	All 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**



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	jdjoe	Doe, John	1/02/2003	2:00 PM	Yes	Spelling and Handwriting	3:00 PM		Phone			Student was doing fine		
123456	milestone	jdjoe	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.

Choose File No file chosen Import

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, Cheree	4/25/2018	3:00 PM	Yes	English		60	Phone			Discussed progress on English essay			Success
79009	milestone	leann	Childers, Cheree	4/25/2018	9:00 AM	Yes	Electives		30	Email		Yes	Shared a list of CTC Class options			For line #03 contact method 'Email' does not match any existing methods, and no method other was sent. Skipping.
79081	milestone	leann	Childers, Cheree	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	Note
78897	milestone	leann	Childers, Cheree	4/25/2018	3:00 PM	Yes	English		60	Phone			Discussed progress on English essay
79009	milestone	leann	Childers, Cheree	4/25/2018	9:00 AM	Yes	Electives		30	Email		Yes	Shared a list of CTC Class options
79081	milestone	leann	Childers, Cheree	4/25/2018	10:00 AM	Yes	Math		60	Phone			Student will be attending tutoring weekly

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Permanent link: [https://schoolpathways.com/knowledgebase/doku.php?id=plsis:contact\\_manager](https://schoolpathways.com/knowledgebase/doku.php?id=plsis:contact_manager)

Last update: **2019/04/01 22:01**