

Contact Manager 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 homerooms or as independent study supervising teachers. But any staff member at the school can create their own contact list. 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. Permissions: To have the system automatically create a Contact List for each teachers supervised students, go to Administration>Settings>Policies»>Contact Manager. In this area you will see two policies. 1. Allow the system to create a contact list for each supervising/homeroom teacher 2. Allow instructors of students, other than the supervising /homeroom teachers, to have access to students A. Access to Contact Manager Contact Manager can be accessed from three vantage points. 1. Administration>Student Info>Contact Manager 3. Teacher Pages>Contact Manager 2. Each student's dashboard If you enter Contact Manager via Admin>Student Info>Contact Manager, you will see a Contact List of other users depending on your permissions. The view below shows two lists; one that was created manually and one that was created by the system. Remember, only teachers set as supervising teachers will have contacts (Student Roster) automatically created for them. If you enter through a student's dashboard, you will only see that student's contact Your login to the system will ultimately direct what you will see. If you log in as a teacher, you will see your contact list and any other teacher's contact list for students you also have in classes. If you enter as an Admin you will see all lists. B. Make a contact for a student on your list Click on View to open up your list of students Currently there are no contact made. Click on Contact Now to make a contact. Enter information about your contact. Check the box if the contact was successfully made. This will turn the contact initial view green. SAVE the contact. Successful contacts shows in green while unsuccessful contacts show in red. Click Contact Now to enter another contact for this student. The name of the person making the contact will always show with the contact. You can edit contacts by clicking on Edit next to your name. C. Create a list. Click on "Add New List" 2. You will start by naming your contact list. I named this one 'Principal 2010/2011.' It would be best to name yours as specifically as possible. If you want to pull a list from a Create-a-Report already in the system, choose the report name. Or you can add students one-by-one as you need to (next picture). Press SAVE for either option. 3. You can search for one of your students by entering some basic information and Searching. Enter a check to the left of the student name you want to add to your list. Click Add Selected at bottom right. The student will be added to your contact list and ready to make contact. D. Printing a Contact 1. In Contact Manager, find your list and click VIEW. Click [Print] to the right of any student's name. 2. Your list will populate in a pdf. Go to File and print to actually print the document. E. Move Student to Historical Contacts Check to the left of any student's name then click the Move Selected Students to Historical You can bring students back to the current list by clicking on show all contact information box, clicking a hidden contact list check box to the left of the list, and clicking on the Back to Main button.

From:

<https://schoolpathways.com/knowledgebase/> - **School Pathways Knowledge Base**

Permanent link:

[https://schoolpathways.com/knowledgebase/doku.php?id=plsis:contact\\_manager&rev=1457035085](https://schoolpathways.com/knowledgebase/doku.php?id=plsis:contact_manager&rev=1457035085)

Last update: **2016/03/03 19:58**