Contact Manager

Contact Manager is a tool all staff can use to:

- track comments/contacts with students and their families.
- note time, focus, and outcomes of any meeting with any student.
- send notifications to specific individuals, regarding specific contacts.

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.

I. Accessing the Contact Manager

There are 4 ways to access the Contact Manager:

- Method 1. Go to Admin>Student Info>Contact Manager
  -From here, you can see existing Contact Lists and create new ones

- Method 2. Go to Teachers>Contact Manager>Contact Manager
  -From here you will be able to select and view contacts for your rosters (Homeroom, PLS Classes, LC Classes, HQT Classes, SPED, etc.)
- Method 3. From Student Dashboard by clicking on the icon.

- Method 4. From Staff Dashboard by clicking on the icon.

II. Setting Up Vendors

- Step 1. Go to Admin>Website Management> Vendors
  -This is where you will set up vendors so staff that has access to Contact Manager for students can enter information related to the Vendor session with the student(s)
- Step 2. Click Add New Vendor and enter all necessary information. Click save.
- Step 3. Check Show Staff box and click Add New Staff to add names of staff providing the vendor services.

III. Create Contacts for Students

This can be done for individual students, or you can mass create.

- Step 1. Click on Contact Now to create an individual contact.
  -To assign a contact to multiple students, check the box to the left of the students' names and click Create Contact for Selected Students
- Step 2. Fill in all relevant information and click Save Contact.
  -After the contact is saved, you can return to your roster to view all contacts
  -Click the Show Contact Information box to expand and view any contacts made for any student
  -Green is a successful contact, blue is a contact that needs follow-up, and pink/red means the contact was unsuccessful
  -Contacts may be printed for individual students or a group of selected students

IV. Contact Report

This report is used to view contacts for a specific date range, teacher, student, or vendor staff

- Step 1. Click on the Contact Report tab
- Step 2. Fill in the fields you wish to filter by and click Show Report

V. How to 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.

- Staff notifications will appear on their staff icon in the top right corner of the page
  -The color of the flag indicates the level of importance or priority of notification.

Sending a Notification

- Step 1. Create a contact as described in the steps above
- Step 2. Before saving contact, select type of Notification Flag from the drop down menu. Once the flag is selected, the box will change to the color of the notification flag
- Step 3. Choose staff to send notification to. Click Save

Staff can open their notifications by clicking on the red circle on their staff picture in the top right corner of the page.
-To clear a notification, click the box to the left of the notification and click Mark All Checked Contact Notifications as Read

— Last Updated by Max Williams on 2016/03/07 23:35