

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

Name	Creator	Report	View	Edit
<input type="checkbox"/> Charmaine	78904	(Students Manually Specified)	View	Edit
<input type="checkbox"/> Cheree	learn	NCLB Part A Title I - Targeted Assistance	View	Edit
<input type="checkbox"/> Counseling	learn	(Students Manually Specified)	View	Edit
<input type="checkbox"/> Craig, Arsh	learn	Staff to Students (current) - Craig	View	Edit
<input type="checkbox"/> Gruber, Amy	learn	(Students Manually Specified)	View	Edit
<input type="checkbox"/> Schlegel, Lindsey	learn	Current Students for Contact Manager	View	Edit

Buttons: Move to Historical, Add New List, Delete Lists and Contacts

- 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.)

Select Staff to View Roster List: Barbato, Alexandra Select

Show Contacts for: 2015 - 2016

Show all contacts for selected Schoolyear: ☐

Print each student's contacts on their own page: ☐

Print Contacts within selected schoolyear: *

Print contacts within date range: 02/25/2016 thru 02/25/2016 [Reset to today](#)

[CSV Download of Selected Students Contacts](#) [Print Selected Students Contacts](#)

☒ Student Roster ☐ PLS Classes


Viewing contact list Barbato, Alexandra (Roster), which currently has 7 students in it.

Student	Enroll Start	Enroll Exit	Previous	Contact	Show
<input type="checkbox"/> Campos, Jordan Print	02/12/2016	Current	Previous Contacts: 1	Contact Now	Show contact information: <input type="checkbox"/>
<input type="checkbox"/> Doty, Adrienne Print	02/12/2016	Current	Previous Contacts: 1	Contact Now	Show contact information: <input type="checkbox"/>
<input type="checkbox"/> Holmes, Spencer Print	02/12/2016	Current	Previous Contacts: 1	Contact Now	Show contact information: <input type="checkbox"/>
<input type="checkbox"/> Howard, Christine Print	02/15/2016	Current	Previous Contacts: 1	Contact Now	Show contact information: <input type="checkbox"/>


[Create Contacts For Selected Students](#)

- Method 3. From Student Dashboard by clicking on the icon.

Student Dashboard



JORDAN CAMPOS Grade: 9 Age: 14

SSID		Legacy ID None	
Local ID 78952			
Gender F	Birthdate 02/11/2002		
Home Phone	Student Cell		
E-Mail:			
Physical Address		Mailing Address	
566 Anywhere St		CA	
Portola, CA 96122			
Parents / Guardians			
Name	Relationship		Cell
No parent or guardian records entered			
Siblings			
Name	Gender	Home Phone	Cell Phone
E-Mail			
No sibling records entered			
 Emergency Card			

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

Staff Dashboard



Alexandria Barbato

For staff member: Barbato, Alexandria

Local ID 4219	Staff Number 60065
Staff Type Teacher	
Gender F	Birthdate 04/06/1994
Contact Phone	
Cell Phone	Fax Number
Work E-mail	SEID
Home E-mail	
Login alexandria	Years of Service 0
LC Univ Prep - 9-12	 Emergency Card

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)

Vendor List Administration

List of Vendors



Vendor Name	Category	County	Edit	View Staff
Math Tutors, Inc.	Tutor	Plumas	Edit	Show Staff: <input type="checkbox"/>
XYZ Driving School	Vendor Classes	Plumas	Edit	Show Staff: <input type="checkbox"/>
Occupational Speech Services	Speech Services	Plumas	Edit	Show Staff: <input type="checkbox"/>
English Tutor ABC	English Tutor	Sierra	Edit	Show Staff: <input type="checkbox"/>

[Add New Vendor](#)
[Send Vendors to ReportWriter](#)
[Export Vendor List as CSV](#)
 After you have edited your Vendor List, you should send them to ReportWriter.
 (so that the vendors can appear on the Master Agreement)

- 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.

Vendor Name	Category	County	Edit	View Staff
Math Tutors, Inc.	Tutor	Plumas	Edit	Show Staff: <input checked="" type="checkbox"/>
	Staff Name	Specialist Type	Edit	
	Caswell, James	Math Tutor	Edit	Add New Staff

III. Create Contacts for Students

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

Viewing contact list **Barbato, Alexandria (Roster)**, which currently has 7 students in it.

<input type="checkbox"/> Student	Enroll Start	Enroll Exit	Previous	Contact	Show
<input type="checkbox"/> Campos, Jordan [Print]	02/12/2016	Current	Previous Contacts: 1	Contact Now	Show contact information: <input type="checkbox"/>
<input type="checkbox"/> Doty, Adrienne [Print]	02/12/2016	Current	Previous Contacts: 1	Contact Now	Show contact information: <input type="checkbox"/>
<input type="checkbox"/> Holmes, Spencer [Print]	02/12/2016	Current	Previous Contacts: 1	Contact Now	Show contact information: <input type="checkbox"/>
<input type="checkbox"/> Howard, Christine [Print]	02/15/2016	Current	Previous Contacts: 1	Contact Now	Show contact information: <input type="checkbox"/>
<input type="checkbox"/> Jackson, Nora [Print]	02/12/2016	Current	Previous Contacts: 1	Contact Now	Show contact information: <input type="checkbox"/>
<input type="checkbox"/> Malaspino, Jessica [Print]	02/15/2016	Current	Previous Contacts: 1	Contact Now	Show contact information: <input type="checkbox"/>
<input type="checkbox"/> Thompson, Katie [Print]	02/15/2016	Current	Previous Contacts: 1	Contact Now	Show contact information: <input type="checkbox"/>

[Create Contacts For Selected Students](#)

- 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

Contact Manager Report

Effective Range	
School Year:	2015 - 2016 ▼
Range:	Track A: LP 8 (02/08/2016 - 03/04/2016) ▼
Start Date:	02/08/2016 <input type="button" value="Set To Week"/>
Finish Date:	03/04/2016
Other Options	
Export:	<input type="checkbox"/> CSV
Show Zero Duration:	<input type="checkbox"/> Show contacts with zero duration and/or contacts failed to be made
Display Type:	<input type="radio"/> Assigned Students <input type="radio"/> Contacts I made
Student:	-- All -- ▼
Vendor Staff:	-- All -- ▼
Subject or Area of Focus:	-- All -- ▼
Contact Method:	-- All -- ▼
Note Search:	<input type="text"/>
<input type="button" value="Show Report"/>	

- 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

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Send Notification Flag:	Attention Needed ASAP
Send myself a notification as well:	<input type="checkbox"/> Yes
Notify Staff:	<div>Note: CTRL + Click to select multiple Staff</div> <div>Brenneman, Kathleen (Administrator, Teacher) ^ Childers, Cheree (Administrator, Teacher) Kramers, Mary (Administrator) Schlegel, Lindsey (Administrator) Stanley, Sherri (Administrator) Gruber, Amy (Office/Clerical) Johnson, JoAnn (Office/Clerical) Parker, Butch (Office/Clerical) Pope, Rebecca (Office/Clerical) Smith, Susan (Office/Clerical, Teacher) Boyd, Danice (Other Classified Staff) Kelton, Blake (Other Classified Staff) Smith, Lora (Other Classified Staff) Guy, Michael (Pupil services)</div>
<div>Delete</div>	



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

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