

# Contact Manager

Contact Manager is a tool all staff can use to:

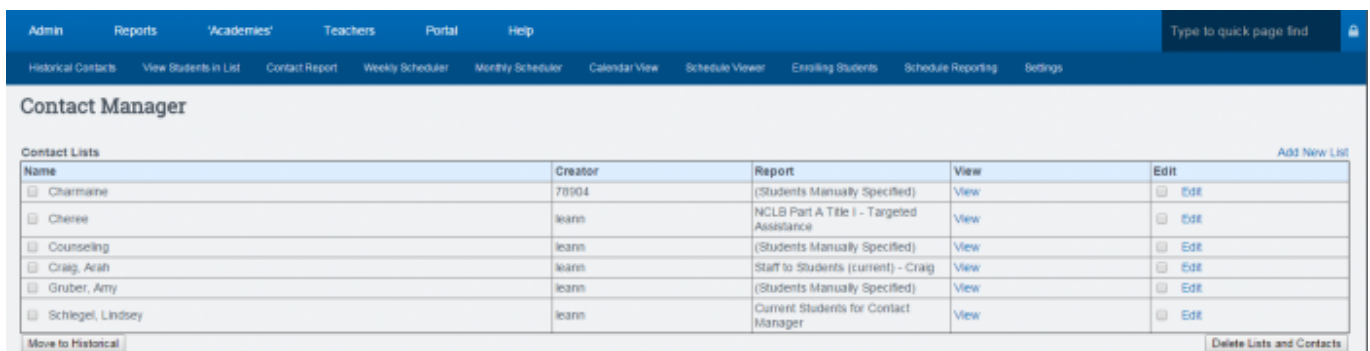
- track comments/contacts with students and their families.
- note time, focus, and outcomes of any meeting with any student.
- send notifications to specific individuals, regarding specific contacts.

**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.**

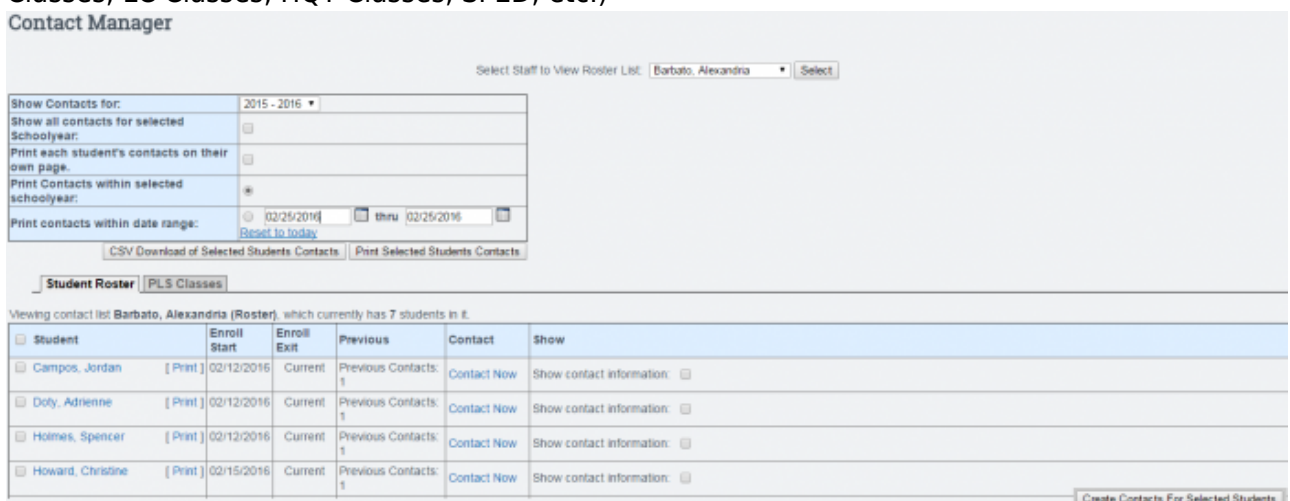
## I. Accessing the Contact Manager

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.

### Student Dashboard



**JORDAN CAMPOS** Grade: 9 Age: 14

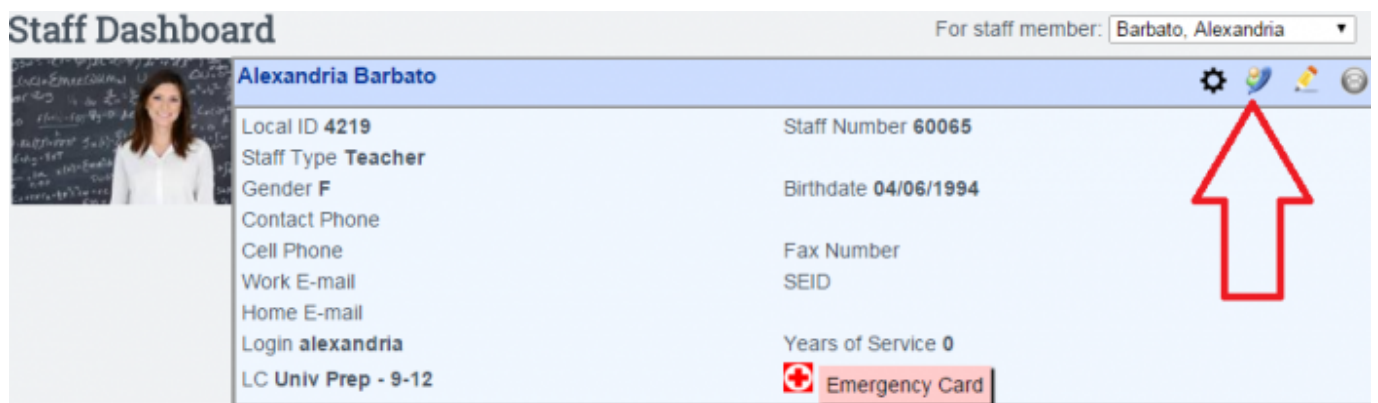
SSID Legacy ID None  
Local ID 78952  
Gender F Birthdate 02/11/2002  
Home Phone Student Cell  
E-Mail:  
Physical Address Mailing Address  
566 Anywhere St CA  
Portola, CA 96122  
Parents / Guardians  
Name Relationship Cell  
*No parent or guardian records entered*  
Siblings  
Name Gender Home Phone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

A red arrow points to the gear icon in the top right corner of the dashboard header.

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

### Staff Dashboard

For staff member: Barbato, Alexandria



**Alexandria Barbato**

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

A red arrow points to the gear icon in the top right corner of the dashboard header.

## 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	<input type="button" value="Edit"/>	Show Staff: <input type="checkbox"/>
XYZ Driving School	Vendor Classes	Plumas	<input type="button" value="Edit"/>	Show Staff: <input type="checkbox"/>
Occupational Speech Services	Speech Services	Plumas	<input type="button" value="Edit"/>	Show Staff: <input type="checkbox"/>
English Tutor ABC	English Tutor	Sierra	<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)*

- 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	<input type="button" value="Edit"/>	Show Staff: <input checked="" type="checkbox"/>
	Staff Name	Specialist Type	Edit	
	Caswell, James	Math Tutor	<input type="button" value="Edit"/>	

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

- 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

Student Name:	Campos, Jordan
Add additional students:	-- Select -- <small>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.</small>
Contacted By:	leann
Contacted For:	Barbato, Alexandria (Roster)
If Vendor Session: Name of Vendor (optional)	-- Choose --
Specialist Type	Administrator
Area/Subject of Focus:	-- Choose --
Date Contacted:	02/25/2016
Beginning Time:	12:15 <input type="radio"/> AM <input checked="" type="radio"/> PM
End Time:	<input type="text"/> <input type="radio"/> AM <input type="radio"/> PM <small>Note: If left blank when creating a new contact, the finish time is automatically set when saving the contact.</small>
Total Time:	<input type="text"/> Total time in minutes.
Contact Method?	-- Choose --
Successfully Made Contact?	<input type="radio"/> Yes <input type="radio"/> No
Follow up Required?	<input type="checkbox"/> Yes
Notes:	<div style="border: 1px solid gray; height: 100px;"></div> <input type="button" value="Save Contact"/>
Send Notification Flag:	-- SELECT --

- Step 2. Fill in all relevant information and click Save Contact.

<input type="checkbox"/> Campos, Jordan	[ Print ]	02/12/2016	Current	Previous Contacts: 3	Contact Now	Show contact information: <input checked="" type="checkbox"/>			
Creator	Met With	Contact Method	Date	Start	Finish	Duration	Flag	Edit	Note
Reeves, LeAnn (leann)	Atkins, Thomas	In-Person	02/25/2016	12:18 pm	-	-		[Edit]	
Reeves, LeAnn (leann)	Howard, Bill	Phone	02/25/2016	12:15 pm	12:17 pm	2 minutes.		[Edit]	
Reeves, LeAnn (leann)	Caswell, James	In-Person	02/25/2016	9:01 am	9:04 am	3 minutes.		[Edit]	

- 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

## 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 [calendar icon] <input type="button" value="Set To Week"/>
Finish Date:	03/04/2016 [calendar icon]

**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"/>

- 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

<b>Send Notification Flag:</b>	Attention Needed ASAP ▾
<b>Send myself a notification as well:</b>	<input type="checkbox"/> Yes
<b>Notify Staff:</b>	<b>Note: CTRL + Click to select multiple Staff</b> 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) ▾

Delete



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

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