

# 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

The screenshot shows the 'Contact Manager' page with a table of contact lists. The table has columns for Name, Creator, Report, View, and Edit. There are 6 rows of data, each with a checkbox in the Name column and an 'Edit' link in the Edit column.

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


- 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.)

The screenshot shows the 'Contact Manager' page with the 'Student Roster' section selected. It displays a table of student contacts for the selected staff member, Barbato, Alexandra. The table has columns for Student, Enroll Start, Enroll Exit, Previous, Contact, and Show. There are 4 rows of data, each with a checkbox in the Student column and a 'Show' link in the Show column.




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

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

### Student Dashboard



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




SSID  
Local ID **78952**  
Gender **F**  
Home Phone  
E-Mail:  
Physical Address  
**566 Anywhere St**  
**Portola, CA 96122**  
Parents / Guardians

Legacy ID **None**  
Birthdate **02/11/2002**  
Student Cell  
Mailing Address  
**CA**  

Name	Relationship	Cell
No parent or guardian records entered		

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 Type **Teacher**  
Gender **F**  
Contact Phone  
Cell Phone  
Work E-mail  
Home E-mail  
Login **alexandria**  
LC Univ Prep - 9-12

Staff Number **60065**  
Birthdate **04/06/1994**  
Fax Number  
SEID  
Years of Service **0**  

 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	<a href="#">Edit</a>	Show Staff: <input type="checkbox"/>
XYZ Driving School	Vendor Classes	Plumas	<a href="#">Edit</a>	Show Staff: <input type="checkbox"/>
Occupational Speech Services	Speech Services	Plumas	<a href="#">Edit</a>	Show Staff: <input type="checkbox"/>
English Tutor ABC	English Tutor	Sierra	<a href="#">Edit</a>	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	<a href="#">Edit</a>	Show Staff: <input checked="" type="checkbox"/>
	Staff Name	Specialist Type	Edit	
	Caswell, James	Math Tutor	<a href="#">Edit</a>	<a href="#">Add New Staff</a>

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

- 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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plsis:contact\_manager [https://schoolpathways.com/knowledgebase/doku.php?id=plsis:contact\\_manager&rev=1480615126](https://schoolpathways.com/knowledgebase/doku.php?id=plsis:contact_manager&rev=1480615126)

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>32 </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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