

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:

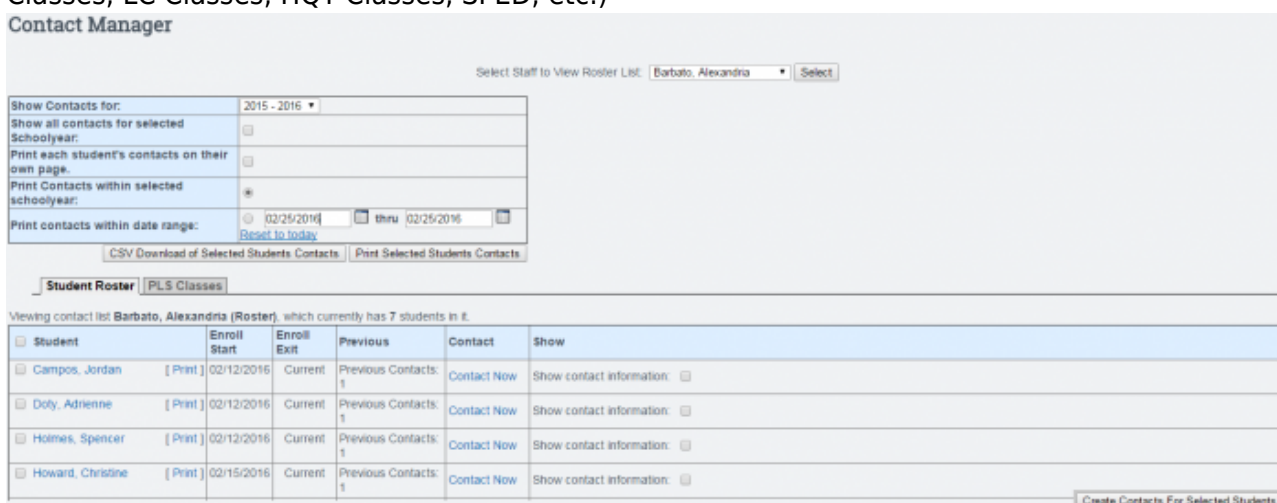
- Method 1. Go to Admin>Student Info>Contact Manager
-From here, you can see existing Contact Lists and create new ones



Name	Creator	Report	View	Edit
<input type="checkbox"/> Charmaine	78904	(Students Manually Specified)	View	Edit
<input type="checkbox"/> Cherree	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.

<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"/>




[Create Contacts For Selected Students](#)

- 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	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

click Create Contact for Selected Students

Student Name:	Campos, Jordan
Add additional students:	<input type="button" value="-- 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)	<input type="button" value="-- Choose --"/>
Specialist Type	Administrator <input type="button" value="v"/>
Area/Subject of Focus:	<input type="button" value="-- Choose --"/>
Date Contacted:	02/25/2016 <input type="button" value="calendar"/>
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"/> <small>Total time in minutes.</small>
Contact Method?	<input type="button" value="-- Choose --"/>
Successfully Made Contact?	<input type="radio"/> Yes <input type="radio"/> No
Follow up Required?	<input type="checkbox"/> Yes
Notes:	<div><div></div></div> <input type="button" value="Save Contact"/>
Send Notification Flag:	<input type="button" value="-- SELECT --"/>

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

Campos, Jordan

[Print]

02/12/2016

Current

Previous Contacts: 3

Contact Now

Show contact information: ☒

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] 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"/>

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

Last update:
2016/12/01
17:58

plsis:contact_manager 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 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></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

— Last Updated by [Max Williams](#) on 2016/03/07 23:35

From:

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

Permanent link:

https://schoolpathways.com/knowledgebase/doku.php?id=plsis:contact_manager&rev=1480615126

Last update: **2016/12/01 17:58**