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Contact Manager

[2017-03-01_14.03_webinar_-_contact_manager_ls_gtm_.mp4](#)

Contact Manager is a tool all staff can use to track comments/contacts with students and their families. Contact lists are automatically created for teachers that have an association with the students through homeroom or as independent study supervising teachers. Quickly allows staff to note time, focus, and outcomes of any meeting with any student. In addition, there is an option to send notifications to specific individuals, regarding the specific contacts.

The **Student Engagement** feature integrated into **Contact Manager** allows a school to track any instructional sessions for any student across time. Any staff member who deals with any student can leave brief information regarding:

- Time spent with the student (minutes, hours). This can be documented in the past or automatically in the present.
- Any type of educational activity can be tracked: phone, in-person, class time, small group instruction, tutoring, email, etc.
- Time and subject matter information can be left for every student in a class or for an individual student.

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.

ACCESS TO CONTACT MANAGER

- Contact Manager can be accessed from four vantage points:

1. Administration > Student Info > Contact Manager

1. If you enter Contact Manager via this route, you have the ability to select and view contacts for any Staff if Security privileges allow

The screenshot shows the Contact Manager interface. At the top, there is a navigation bar with tabs: View Students in List, Contact Request, Weekly Schedule, Monthly Schedule, Calendar View, Student Contact, Meeting Student, Schedule Planning, and Settings. Below the navigation bar, there is a section titled 'Select Staff to View Roster List' with a dropdown menu showing 'Rebecca Larkin' and a 'Select' button. This section is circled in red. Below this, there are filters for 'Restrictions' (School Year: 2016 - 2017) and 'Range' (Entire School Year: 08/28/2016 - 05/26/2017). There are also buttons for 'Show Historical Contacts' and 'Update'. Below the filters, there is a section titled 'Associated Student Contacts' with a dropdown menu showing 'Showing contact list for 12th grade, which currently has 88 students in it' and buttons for 'Show All', 'Show Independent Study', and 'Select PLD Class'. At the bottom, there is a table with columns: Staff, Student, Enroll Start, Enroll End, Contact Now, and Contacts Found. The table lists three students: Brown, Suzanne; Casey, Janet; and Chang, Mary, each with a 'Contact Now' button and a 'Show Contacts' button.

Staff	Student	Enroll Start	Enroll End	Contact Now	Contacts Found	Show Notes
	Brown, Suzanne	07/13/2016	Current	Contact Now	0 (Last contact on 02/26/2017)	Show Contacts
	Casey, Janet	06/23/2016	Current	Contact Now	1 (Last contact on 08/19/2016)	Show Contacts
	Chang, Mary	07/18/2016	Current	Contact Now	1 (Last contact on 12/26/2016)	Show Contacts

2. Teacher Pages > Contact Manager

1. If you enter Contact Manager via this route, you only have the ability to select and view contacts for your rosters (Homeroom, PLS Classes, LC Classes, HQT Classes, SPED, etc.)

The screenshot shows the 'Contact Manager' interface. At the top, there's a 'Select Staff to View Roster List' dropdown with 'Revel, LAMR' selected. Below this, there's a 'Restrictions' section with 'School Year' set to '2016 - 2017' and a 'Range' dropdown set to 'School Year: 09/01/2016 - 09/01/2017'. Under 'Associated Student Contacts', it says 'Viewing contact list for 12th grade, which currently has 88 students in it'. There are buttons for 'Show All' and 'Show Independent Study'. A yellow arrow points to the 'Show All' button. Below this is a table of student contacts.

Student	Enroll Start	Enroll Finish	Contact Now	Contacts Found	Show Notes
Brown, Suzanne	07/13/2016	Current	Contact Now	5 (Last contact on 02/29/2017)	Show Contacts
Covey, Janet	06/29/2016	Current	Contact Now	1 (Last contact on 06/19/2016)	Show Contacts
Chang, Mary	07/13/2016	Current	Contact Now	1 (Last contact on 12/23/2016)	Show Contacts

3. Each Student Dashboard via the icon

The screenshot shows a 'Student Dashboard' for 'JOHN ABNEY', Grade: 4, Age: 10. It includes a profile picture of a young boy. The dashboard displays various information: SSID 1014164548, Local ID 78698, Gender M, Birthdate 02/20/2007, Home Phone (555) 555-5555, Student Cell (530) 249-3939, School E-Mail: Abneyfamily@mailinator.com, Physical Address: 333 Forest Avenue, Portola, CA 96122, and Mailing Address: 333 Forest Avenue, Portola, CA 96122. It also lists Parents / Guardians: Abner Abney (Lives With), Father, (555) 555-5555, E-Mail: AbnerAbney@mailinator.com. There is a section for Siblings with the message 'No sibling records entered'. At the bottom, there is an 'Emergency Card' icon. A black arrow points to the 'Student Dashboard' icon in the top right corner.

4. Each Staff Dashboard via the icon

The screenshot shows a 'Staff Dashboard' for 'Anita L. Chang'. It includes a profile picture of a woman. The dashboard displays various information: Local ID 4152, Staff Number 1234, Job Classification Teacher, Position Title Teacher IS K-12, Gender F, Birthdate 09/14/2012, Contact Phone, Fax Number, Cell Phone, SEID 8888764675, Work E-mail kathleenmpt@gmail.com, Home E-mail, Login anita, Years of Service 17, and Learning Center Region 3. At the bottom, there is an 'Emergency Card' icon. A black arrow points to the 'Staff Dashboard' icon in the top right corner.

CREATE CONTACTS FOR SELECTED STUDENTS

- Click “Contact Now” to create contact for individual student. Or select a group students and click the “Create Contacts for Selected Students” button.

Associated Student Contacts
Viewing contact list Childers, Cheree (Roster), which currently has 25 students in it.

☐ Show All ☒ Show Independent Study

Set	Student	Enroll Start	Enroll Finish	Contact Now	Contacts Fou
<input type="checkbox"/>	Bladeck, Scott	07/18/2016	Current	Contact Now	4 (Last contact on 02/28/2017)
<input type="checkbox"/>	Child, Daisy	07/18/2016	Current	Contact Now	5 (Last contact on 02/28/2017)
<input type="checkbox"/>	Howard, Bill	07/18/2016	Current	Contact Now	1 (Last contact on 02/16/2017)
<input type="checkbox"/>	Howe, Anna	07/18/2016	Current	Contact Now	
<input type="checkbox"/>	Lee, Carol	07/18/2016	Current	Contact Now	
<input type="checkbox"/>	Lloyd, Dan	07/01/2014	06/17/2016	Contact Now	
<input type="checkbox"/>	Lloyd, Garren	07/18/2016	Current	Contact Now	
<input type="checkbox"/>	Mo, Bill	07/18/2016	Current	Contact Now	

Click “Contact Now” to create contact for individual student

Put a check mark next to student(s) name to create contact for a specific group

Create Contacts for Selected Students

- Enter all relevant information to the contact and “SAVE CONTACT”

Contact Student

Student Name: Bladeck, Scott

Add additional students:

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.

Contacted By: leann

Contacted For: Childers, Cheree (Roster)

If Vendor Session: Name of Vendor (optional)

Specialist Type: Administrator

Area/Subject of Focus:

Date Contacted: 02/28/2017

Beginning Time: 3:18 AM ☒ PM

End Time: AM ☐ PM

Note: If left blank when creating a new contact, the finish time is automatically set when saving the contact.

Total Time: Total time in minutes.

Contact Method?

Successfully Made Contact? ☐ Yes ☐ No

Follow up Required? ☐ Yes

Notes:

Send Notification Flag:



NOTE: Information relevant to the student is available by expanding the blue arrow

Contact Student		<div>Student Information</div> <div>Household Information</div> <div>Class Information</div>
Student Name:	Bladeck, Scott	
Add additional students:	<input type="text"/> <input type="button" value="Add Student"/> <p>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.</p>	
Contacted By:	leann	
Contacted For:	Childers, Cheree (Roster)	
If Vendor Session: Name of Vendor (optional)	-- Choose --	
Specialist Type	Administrator	

- After your contact is saved, you can return to your roster to view all contacts. Click the "Show Contacts" box to expand and view/read any contacts made for any student. Contacts may be printed for individual student or a group of selected students.

Restrictions: School Year: 2016 - 2017 Range: -- Manually Specified -- 06/20/2016 05/25/2017

Associated Student Contacts: Viewing contact for Childers, Cheree (Roster), which currently has 25 students in it.

Show All Show Independent Study Select Class

Search:

Set	Student	Enroll Start	Enroll Finish	Contact Now	Contacts Found	Show Notes
1	Bladeck, Scott	07/18/2016	Current	Contact Now	4 (Last contact on 02/28/2017)	Show Contacts
2	Child, Daisy	07/18/2016	Current	Contact Now	5 (Last contact on 02/28/2017)	Show Contacts
3	Howard, Bill	07/18/2016	Current	Contact Now	1 (Last contact on 02/16/2017)	Show Contacts
4	Howe, Anna	07/18/2016	Current	Contact Now		
5	Lee, Carol	07/18/2016	Current	Contact Now		
6	Lloyd, Dan	07/01/2014	06/17/2016	Contact Now		
7	Lloyd, Garin	07/18/2016	Current	Contact Now		
8	Mo, Bill	07/18/2016	Current	Contact Now		

Create Contacts for Selected Students Print Contacts for Selected Students Export CSV for Selected Students

Showing 5 contacts for Child, Daisy made between 06/20/2016 and 05/25/2017

Search:

#	Created	Met With	Contact Method	Date	Start	Finish	Duration	Flag	Note
1	Reeves, LaAnn (leann)	leann	Phone	02/28/2017 12:07 pm	-	-	-	Yellow	Student did not attend monthly meeting. Please call teacher to discuss.
2	Reeves, LaAnn (leann)	leann	Mail School Site	02/27/2017 2:09 pm	-	-	-	Yellow	Student did not attend English tutoring today. Missing several assignments. Please call teacher to schedule a meeting to discuss class attendance issues.
3	Reeves, LaAnn (leann)	leann	Phone	02/23/2017 8:40 am	8:41 am	1 minutes	-	Green	Test
4	Reeves, LaAnn (leann)	leann	Phone	02/23/2017 3:31 pm	-	-	-	Yellow	Missing classes
5	Reeves, LaAnn (leann)	leann	Phone	02/23/2017 8:56 am	-	-	-	Yellow	TEST

Print Contacts for this Student

GREEN: successful contact
RED: unsuccessful contact
YELLOW: needs follow-up

Edit contact information

Print contacts per student

ADMINISTRATIVE CONTACT REPORT

- This report is used to view contacts for a specific date range, Teacher, Student, and Vendor Staff, and more. Various filters are available to pull a report of contacts that have been logged within Contact Manager.
- To access, click the gray Contact Report tab > Select dates & filters > Show Report

View Students in List

Contact Report

Weekly Scheduler

Monthly Scheduler

Calendar View

Schedule Viewer

Enrolling Students

Schedule Reporting

Settings

Contact Manager Report

Contact Manager Report

▼ Restrictions

Learning Center

0 Selected (defaults to all)

School Year

2016 - 2017

Range

-- Manually Specified --

06/20/2016

thru

02/28/2017

▼ Other Options

Export

☐ CSV

Show Zero Duration

☐ Show contacts with zero duration and/or contacts failed to be made

Display Type

All Students

Teacher Student Met With

-- All --

Assigned Teacher

-- All --

Student

-- All --

Vendor Staff

1 Selected

Subject or Area of Focus

-- All --

Contact Method

-- All --

Note Search

Student Name	Contact Date	Contact Time	Total Time	Contact Method	Met with	Type	Area/Subject	Notes
Aloney, John	07/19/2016	9:16 am	1 minutes	Online Meeting/Digital Contact	Reeves, LeAnn	9-12 English Tutor	Mathematics	Student needs to attend weekly tutoring session to get help with math work. Student is falling behind.
	07/19/2016	10:18 am	12 minutes	In-Person	Reeves, LeAnn	9-12 English Tutor	Mathematics	Met to discuss math class.
	07/19/2016	10:35 am	40 minutes	In-Person	Reeves, LeAnn	9-12 English Tutor	Mathematics	John needs to attend tutoring sessions regarding math. Please schedule time with tutor.
	07/19/2016	10:46 am	1 hour and 0 minutes	Online Meeting/Digital Contact	Reeves, LeAnn	9-12 English Tutor	Mathematics	Student needs to attend tutoring session.
Aloney, Kristen	11/05/2016	1:14 pm	55 minutes		Reeves, LeAnn	9-12 English Tutor		
Aloney, Tamara	02/20/2017	2:55 pm	5 minutes		Reeves, LeAnn	9-12 English Tutor		test/test
Alums, Christian	11/10/2016	9:12 am	--		Schiergel, Lindsey	9-12 English Tutor		Test for email
Alcala, Jessica	02/20/2017	2:55 pm	5 minutes		Reeves, LeAnn	9-12 English Tutor		test/test
Auhcraft, August	07/22/2016	9:09 am	1 hour and 0 minutes	In-Person	Reeves, LeAnn	Math Tutor	Mathematics	
Byers, Ashton	11/04/2016	11:51 am	1 hour and 0 minutes	At School Site	Reeves, LeAnn	9-12 English Tutor	Monthly Mtg #2	Student is turning in minimal work. Struggling with several of his classes. In danger of academic failure.
Baty, George	10/11/2016	8:24 am	1 hour and 0 minutes	In-Person	Chang, Anita	9-12 English Tutor	Monthly Mtg #1	Met to discuss LP 4 work. Student turned in work for LP 3. Review math work and discussed setting up regular weekly tutor sessions. Gave student updated AWR.
	10/21/2016	8:27 pm	--	Phone	Chang, Anita	9-12 English Tutor	Mathematics	Called parent to discuss math progress and setting up weekly tutoring sessions. Left a viber.
	10/24/2016	8:28 pm	--	At School Site	Chang, Anita	9-12 English Tutor	Mathematics	Student did not attend on site math class.
	11/03/2016	9:20 am	1 hour and 0 minutes	At School Site	Chang, Anita	9-12 English Tutor	Mathematics	Met to go over math concepts. Will be meeting with me weekly to do math tutoring.

HOW DO I 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.

Recent Pages

Enter search text

Students

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- Staff members will have notification flags appear next to the profile picture at the top of right of the SIS
 - Color of the flag indicates level of importance or priority of notification (Emergency, Attention Needed, Academic Failure, General Information)
- Sending a notification
 1. Create contact as described in steps above and enter all relevant information
 2. Prior to saving contact, select type of "Notification Flag" from the drop-down box. Once the flag is selected the color of flag will be displayed (Example: "Attention Needed ASAP" is highlighted red)

3. Select staff members to notify. Multiple staff may be selected by holding CTRL + Click to select multiple Staff and/or chose to send Parents an Email notification.

Select Parents to receive Email notification

Select staff members to receive the notification

This area will eventually send notification to Portal. Not currently available.

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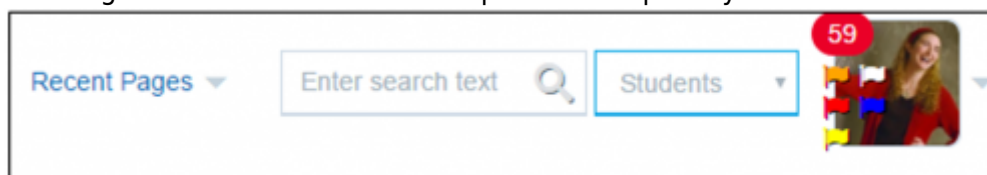
4. SAVE Contact
5. Once the contact is saved and you "Show Contacts" for a specific student "Notification Flag Information" the flag notification sent will be noted. You can also clicking on "Edit" of contact saved

#	Creator	Met With	Contact Method	Date	Start	Finish	Duration	Flag	Edit	
1	Reeves, LeAnn (leann)	leann	Phone	02/28/2017	12:07 pm	-	-	Attention Needed ASAP	[Edit]	Student did not attend monthly meeting. Please call teacher to discuss.
2	Reeves, LeAnn (leann)	leann	At School Site	02/27/2017	2:09 pm	-	-	Attention Needed ASAP	[Edit]	Student did not attend English tutoring today. Missing several assignments.
3	Reeves, LeAnn (leann)	leann	Phone	02/23/2017	8:40 am	8:41 am	1 minutes	Attention Needed ASAP	[Edit]	Test
4	Reeves, LeAnn (leann)	leann	Phone	02/23/2017	3:31 pm	-	-	Attention Needed ASAP	[Edit]	Missing classes
5	Reeves, LeAnn (leann)	leann	Phone	02/23/2017	8:56 am	-	-	Attention Needed ASAP	[Edit]	TEST

Details of notifications sent are included within the specific contact for which it was attached

Student Information			
Parent Information			
Class Information			
Notification Flag Information			
Flag	Description	Notification Recipient	Date Sent
Attention Needed ASAP	Staff: Ashton, Taryn	Mon Jul 13, 2015 - 2:02 pm	
Attention Needed ASAP	Staff: Boyd, Danice	Mon Jul 13, 2015 - 2:02 pm	
Attention Needed ASAP	Staff: Brennenman, Kathleen	Mon Jul 13, 2015 - 2:02 pm	
Attention Needed ASAP	Staff: Childers, Chere	Mon Jul 13, 2015 - 2:02 pm	

- Where will staff see the notifications they have received?
 - Staff members will have flags next to the notifications envelope count in the blue header of the SIS to show nature of notification
 - Color of the flag will indicate level of the importance or priority of notification



- Hover over the flag for a brief description
- Click directly on the flag to read notification

Show old/inad messages? ☐ Yes

Show notifications for: Reeves, LeAnn

Administrative: (Manage Banner Notifications)

Contact Manager Notifications

Notifications sent out with contacts will be shown below:

Event	Sent By	Subject	Message	Flag	Student
<input type="checkbox"/> 02/27/2017 11:28 am	Reeves, LeAnn (jeanne)	Contact Notification: Attendance Issues	A Contact was created with the following note: TEST AGAIN 2/28/17 ----- Message sent by Reeves, LeAnn For student: Scott Stadelock		Stadelock, Scott
<input type="checkbox"/> 02/27/2017 2:10 pm	Reeves, LeAnn (jeanne)	Contact Notification: Attendance Issues	A Contact was created with the following note: Student did not attend English tutoring today. Missing several assignments. Please call teacher to schedule a meeting to discuss class attendance issues. ----- Message sent by Reeves, LeAnn For student: Daisy Child		Child, Daisy








- To mark the notification as Read, click the box to the left of the notification, typing CONFIRM, and clicking "Mark All Checked Contact Notifications as Read". The Date and time read will be noted.

CONFIRM:

Mark All Checked Contact Notifications as Read

ADMINISTRATION: SET-UP NOTIFICATION FLAGS

- To set-up notification flags go to Administration > Settings > Trigger Emails
- Click on the "Notification Flags" tab

Email Notifications Notification Flags Event Triggers			
Icon	Description	Color	Edit
	Emergency	Pink	Edit
	Attention Needed ASAP	Red	Edit
	Academic Failure	Orange	Edit
	Attendance Issues	Yellow	Edit
	General Information/Counselor	White	Edit
	General Information/Office	Blue	Edit
	General Information/Admin	Lime	Edit
Add New Flag			

3. You may "Edit" the default flags that are available or.....
4. Click "New Flag", enter flag description, select color, and "Save Flag Settings"

Notifications & Flagging - Create New Flag

Flag Description:	<input type="text"/>
Flag Color:	<input type="text" value="Aqua"/>

[Back](#) [Save Flag Settings](#)

ADMINISTRATION: SET-UP VENDORS

- Go to Administration > Portal Management > Vendors
- You can set-up vendors that will be providing services to students, so that staff that have access to Contact Manager for student can enter information related to the Vendor Session with the student(s). Once vendor names are entered, they will be available for selection from a drop down box when entering contact information.

Contact Student

Student Name:

Brown, Susanne

Add additional students:

Add Student

Note: Adding additional students will create a copy of this contact. You will need to be done to each contact separately.

Contacted By:

leann

Contacted For:

List for 12th grade

If Vendor Session: Name of Vendor (optional)

-- Choose --

Specialist Type

Caswell, James (Math Tutor)

Area/Subject of Focus:

Atkins, Thomas (Driving Instructor)
Howard, Bill (Driving Instructor)
Schwartz, George (Occupational Therapist)
Howard, Sue (Tutors 6-8 Students)
Howard, Bill (9-12 English Tutor)
Jones, Sue (Math Tutor)

Date Contacted:

Beginning Time:

1. Click “Add New Vendor” and enter all necessary information and click “SAVE”

List of Vendors

Vendor Name	Category	Vendor Type	State	County	Edit	View Staff <input type="checkbox"/>
Almond Country Famrs		External	CA	Butte	Edit	Show Staff: <input type="checkbox"/>
English Tutor ABC	English Tutor	External	CA	Sierra	Edit	Show Staff: <input type="checkbox"/>
Math Tutors, Inc.	Tutor	External	CA	Plumas	Edit	Show Staff: <input type="checkbox"/>
Milestone Academy		School	CA		Edit	Show Staff: <input type="checkbox"/>
Occupational Speech Services	Speech Services	External	CA	Plumas	Edit	Show Staff: <input type="checkbox"/>
XYZ Driving School	Vendor Classes	External	CA	Plumas	Edit	Show Staff: <input type="checkbox"/>

Add New Vendor

Export Vendor List as CSV

Send Vendors to ReportWriter

After you have edited your Vendor List, you should send them to ReportWriter.
(so that the vendors can appear on the Master Agreement)

2. Click to “Show Staff” and then click “Add New Staff” to add name of staff providing the vendor services

Vendor Name	Category	Vendor Type	State	County	Edit	View Staff <input type="checkbox"/>
Almond Country Famrs		External	CA	Butte	Edit	Show Staff: <input type="checkbox"/>
English Tutor ABC	English Tutor	External	CA	Sierra	Edit	Show Staff: <input checked="" type="checkbox"/>
	Staff Name	Specialist Type		Contacts	Edit	
	Howard, Bill	9-12 English Tutor		1	Edit	
	Howard, Sue	Tutors 6-8 Students		0	Edit	
	Add New Staff					

ADMINISTRATION: CONTACT MANAGER SCHOOL POLICIES

- Schools have the ability to customize the options in the drop downs for “Area/Subject of Focus” and “Contact Method”

Student Name:	Bladeck, Scott
Add additional students:	<input type="text"/> <input type="button" value="Add Student"/>
	Note: Adding additional students will create a copy, need to be done to each contact separately.
Contacted By:	leann
Contacted For:	Childers, Cheree (Roster)
If Vendor Session: Name of Vendor (optional)	-- Choose --
Specialist Type	Administrator
Area/Subject of Focus:	-- Choose --
Date Contacted:	03/01/2017
Beginning Time:	1:01 <input type="radio"/> AM <input checked="" type="radio"/> PM
End Time:	<input type="text"/> <input type="radio"/> AM <input type="radio"/> PM
	Note: If left blank when creating a new contact, the
Total Time:	<input type="text"/>
	Total time in minutes.
Contact Method?	-- Choose --

- Access School Policies via Admin > Settings > Policies > Contact Manager - click to show policies
- See policies #8 and #9. Enter custom list with no commas or spaces. Then "Set Preferences"

8. What options can be selected for Contact Method? (contactmethodoptions)	All
Please set which options can be set for Contact Method in the text field. They must be comma delimited	
Phone, Email, In Person, At S	
9. What options can be selected for Area/Subject of Focus? (contactareasubjectoptions)	All
Please set which options can be set for Area/Subject of Focus in the text field. They must be comma delimited	
Monthly Mtg #1, Monthly Mtg	

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