

admin, student records, contact manager, video, webinar wednesday

# 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.

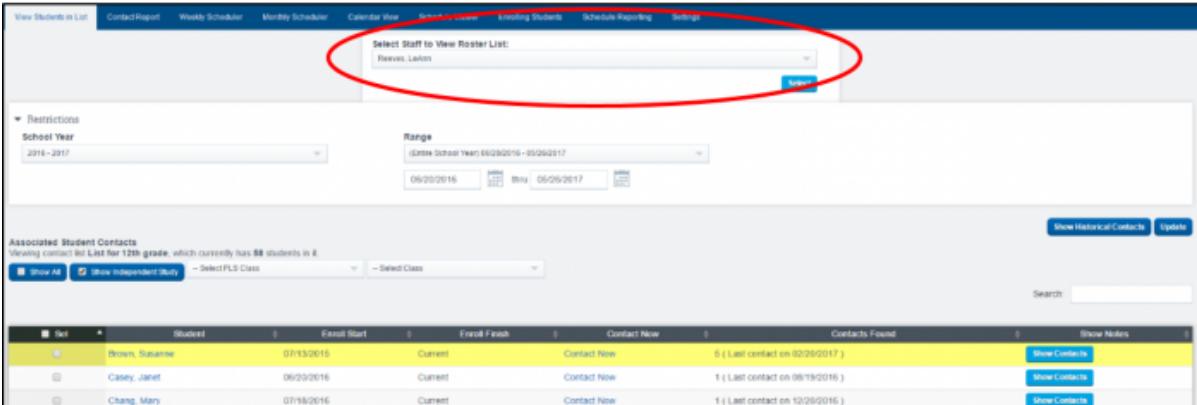
Depending on permissions set, some users will be able to view all contact lists while others will be able to only view the homeroom teacher's/independent study teacher's contacts if they too teach the student.

## ACCESS TO CONTACT MANAGER

- Contact Manager can be accessed from four vantage points:

1. Administration > Student Info > Contact Manager

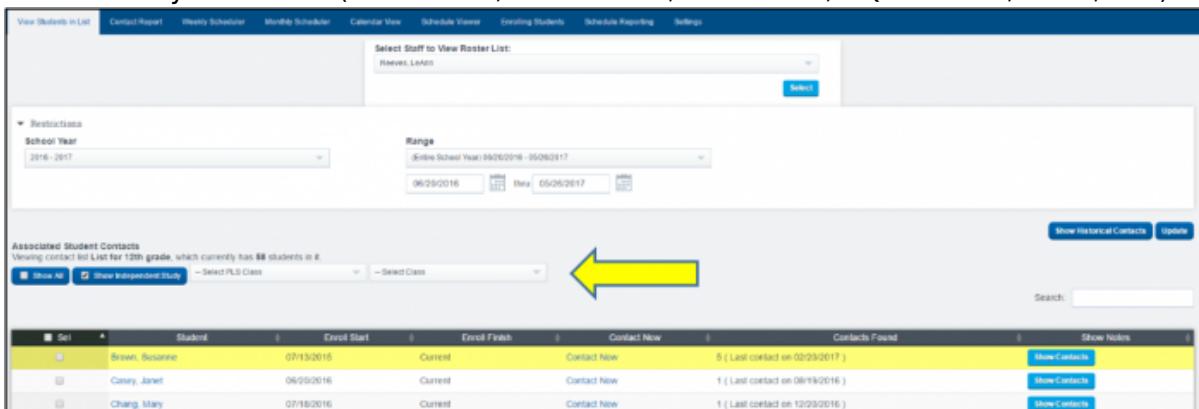
1. If you enter Contact Manager via this route, you have the ability to select and view contacts for any Staff if Security privileges allow



The screenshot shows the 'Contact Manager' page. At the top, there is a navigation bar with links: 'View Students in List', 'Contact Report', 'Weekly Scheduler', 'Monthly Scheduler', 'Calendar View', 'Homeroom', 'Independent Study', 'Scheduling Modules', 'Schedule Reporting', and 'Logout'. Below the navigation bar, there is a dropdown menu labeled 'Select Staff to View Roster List' with an option 'Revised, Labeled'. Underneath this, there are sections for 'Restrictions' (School Year: 2016-2017) and 'Range' (Date School Year: 06/26/2016 - 03/26/2017, Start: 06/20/2016, End: 06/26/2017). A red circle highlights the 'Select Staff to View Roster List' dropdown. Below these sections, there is a table titled 'Associated Student Contacts' with columns: 'Red', 'Student', 'Enroll Start', 'Enroll Finish', 'Contact Now', 'Contacts Found', and 'Show Notes'. The table contains three rows: 'Brown, Susanne' (Red), 'Casey, Janet' (Red), and 'Chang, Mary' (Red). Each row has a 'Show Contact' button. At the bottom right of the table, there is a 'Search' input field and a 'Show Historical Contacts' button.

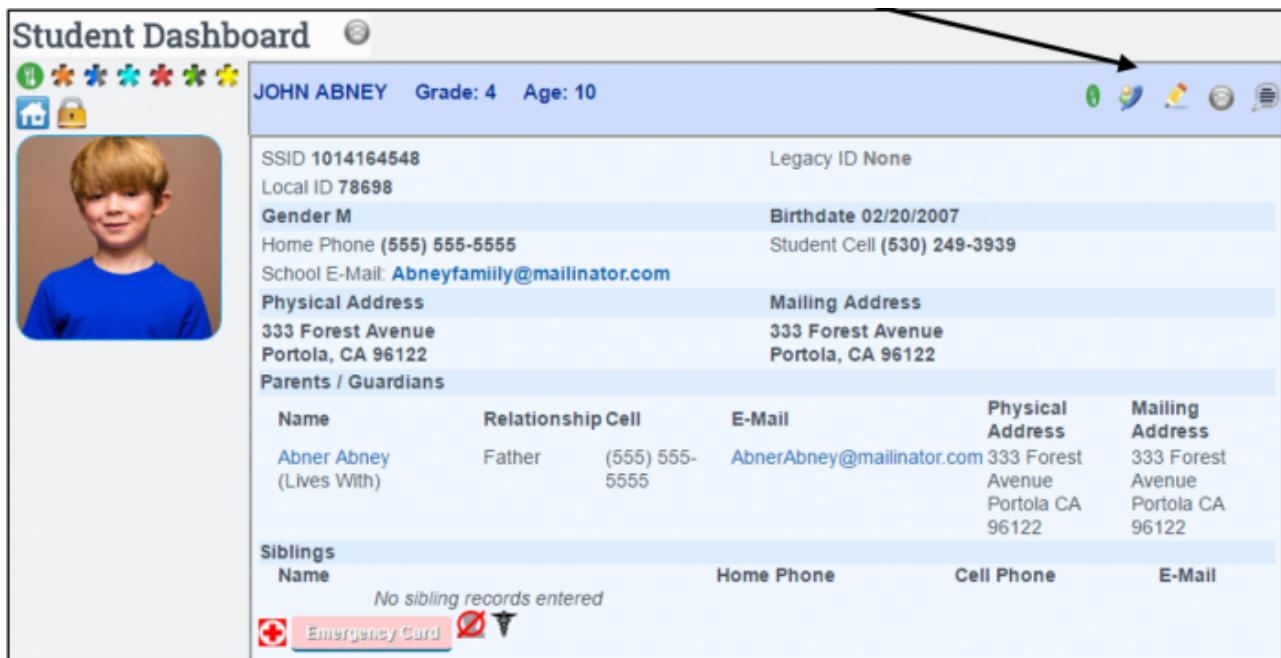
## 2. Teacher Pages > Contact Manager

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.)



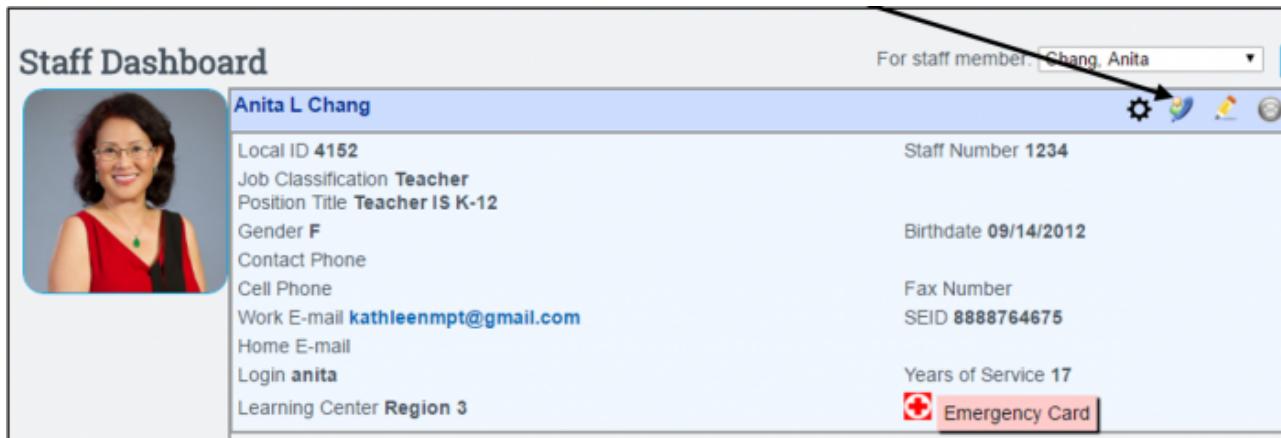
The screenshot shows the Contact Manager interface. At the top, there are tabs for 'View Students in List', 'Contact Report', 'Weekly Scheduler', 'Monthly Scheduler', 'Calendar View', 'Schedule Viewer', 'Enrolling Students', 'Schedule Reporting', and 'Settings'. Below these are dropdown menus for 'Select Staff to View Roster List' (set to 'Reeves, Linda') and 'School Year' (set to '2016-2017'). A 'Range' dropdown shows 'Entire School Year 09/06/2016 - 05/06/2017' with date pickers for 'Start' (06/06/2016) and 'End' (05/06/2017). A yellow arrow points to the 'Select Class' dropdown menu. The main area displays a table of 'Associated Student Contacts' with columns: 'Sel', 'Student', 'Enroll Start', 'Enroll Finish', 'Contact Now', 'Contacts Found', and 'Show Notes'. The table contains three rows: Brown, Susanne (enrolled 07/13/2016, current, Contact Now, 0 contacts); Casey, Janet (enrolled 06/29/2016, current, Contact Now, 1 contact last on 08/19/2016); and Chang, Mary (enrolled 07/18/2016, current, Contact Now, 1 contact last on 12/23/2016). Buttons for 'More Contacts' are visible for each row.

## 3. Each Student Dashboard via the icon



The screenshot shows the Student Dashboard for John Abney. At the top, it displays 'Student Dashboard' with a student icon, the student's name 'JOHN ABNEY', grade '4', and age '10'. Below this is a photo of John. The dashboard is divided into sections: 'Student 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), 'Mailing Address' (333 Forest Avenue, Portola, CA 96122), 'Parents / Guardians' (Abner Abney, Father, Relationship Cell (555) 555-5555, E-Mail AbnerAbney@mailinator.com), and 'Siblings' (No sibling records entered). At the bottom are 'Emergency Card' and 'First Aid' icons.

## 4. Each Staff Dashboard via the icon



The screenshot shows the Staff Dashboard for Anita L Chang. At the top, it displays 'Staff Dashboard' with a staff member icon, the staff member's name 'Anita L Chang', and a dropdown for 'For staff member: Chang, Anita'. Below this is a photo of Anita. The dashboard is divided into sections: 'Local ID 4152', 'Job Classification Teacher', 'Position Title Teacher IS K-12', 'Gender F', 'Contact Phone', 'Cell Phone', 'Work E-mail kathleenmpt@gmail.com', 'Home E-mail', 'Login anita', 'Learning Center Region 3', 'Staff Number 1234', 'Birthdate 09/14/2012', 'Fax Number', 'SEID 8888764675', 'Years of Service 17', and 'Emergency Card'.

## 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 -- Select Class

Sel	Student	Enroll Start	Enroll Finish	Contact Now	Contacts For
<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, Carroll	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	

**Create Contacts for Selected Students**

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

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

Contact Student

Student Name: Bladeck, Scott

Add additional students: [Add Student](#)

Contacted By: Mann

Contacted For: Childers, Cheree (Roster)

If Vendor Session: Name of Vendor (optional): -- Choose --

Specialist Type: Administrator

Area/Subject of Focus: -- Choose --

Date Contacted: 02/28/2017

Beginning Time: 3:18  AM  PM

End Time:  AM  PM

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

Contact Method: -- Choose --

Successfully Made Contact?  Yes  No

Follow up Required?  Yes

Notes:

Send Notification Flag: -- SELECT --

**Save Contact**



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

Contact Student		Student Information	
Student Name:	Bladeck, Scott	Household Information	
<input type="button" value="Add Student"/>		Bladeck, Pearl (Mother) 234 Bend Ave Blairsden, CA 96103 Home Phone: Work Phone: Cell Phone: Email: pbladeck@mailinator.com	
Add additional students:		Class Information	
<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:	jeann		
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.

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

Show All Show Independent Study Select Class

Student	Event Start	Event End	Contact Now	Contacts Found
Bladeck, Scott	07/18/2016	Current	Contact Now	4   Last contact on 02/28/2017)
Child, Daisy	07/18/2016	Current	Contact Now	5   Last contact on 02/28/2017)
Howard, Bill	07/18/2016	Current	Contact Now	1   Last contact on 02/16/2017)
Hove, Anna	07/18/2016	Current	Contact Now	
Lee, Carroll	07/18/2016	Current	Contact Now	
Lloyd, Dan	07/01/2014	06/17/2015	Contact Now	
Lloyd, Gaines	07/18/2016	Current	Contact Now	
Mko, Bill	07/18/2016	Current	Contact Now	

Show Notes  
Show Contacts  
Show Contacts  
Show Contacts

Show Historical Contacts Update  
Search:

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

Showing 5 contacts for CNAID, Darsy made bet: 06/20/2016 and 05/25/2017

Creator	Met With	Contact Method	Date	Start	End	Duration	Flag	Edit	Note
1 Reeves, LeAnn (team)	jeann	Yellow	02/28/2017	12:07 pm	-	-	Yellow	[Edit]	Student did not attend monthly meeting. Please call teacher to discuss.
2 Reeves, LeAnn (team)	jeann	Yellow	02/27/2017	2:00 pm	-	-	Yellow	[Edit]	Student did not attend English tutoring today. Missing several assignments. Please call teacher to schedule a meeting to discuss class attendance issues.
3 Reeves, LeAnn (team)	jeann	Green	02/23/2017	8:40 am	8:41 am	1 minutes	Green	[Edit]	Yes
4 Reeves, LeAnn (team)	jeann	Yellow	02/23/2017	3:31 pm	-	-	Yellow	[Edit]	Missing classes
5 Reeves, LeAnn (team)	jeann	Yellow	02/23/2017	8:56 am	-	-	Red	[Edit]	TEST

Print Contacts for this Student

Search:

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

▼ 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**

View Report								
Student Name	Contact Date	Contact Time	Total Time	Contact Method	Met with	Type	Area/Subject	Notes
Abney, 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 attending 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.
Abney, Kristen	11/05/2016	1:14 pm	55 minutes		Reeves, LeAnn	9-12 English Tutor		
Abney, Tamara	02/20/2017	2:55 pm	5 minutes		Reeves, LeAnn	9-12 English Tutor		test/test/test
Alton, Christian	11/10/2016	9:12 am	—		Schlegel, Lindsey	9-12 English Tutor		Test for email
Atoca, Jessica	02/20/2017	2:55 pm	5 minutes		Reeves, LeAnn	9-12 English Tutor		test/test/test
Ashcroft, August	07/22/2016	9:09 am	1 hour and 0 minutes.	In-Person	Reeves, LeAnn	Math Tutor	Mathematics	
Ayers, 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.
Baily, 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 APR.
	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 VM.
	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.

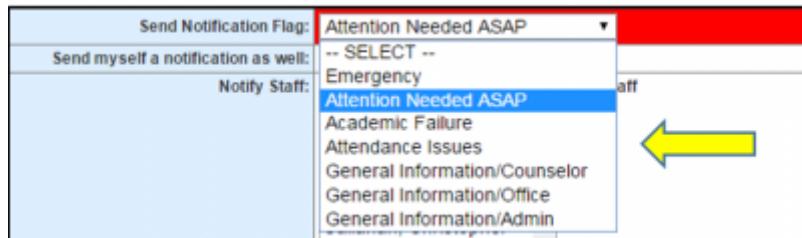
## HOW DO I SEND CONTACT MANAGER NOTIFICATIONS?

- 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.

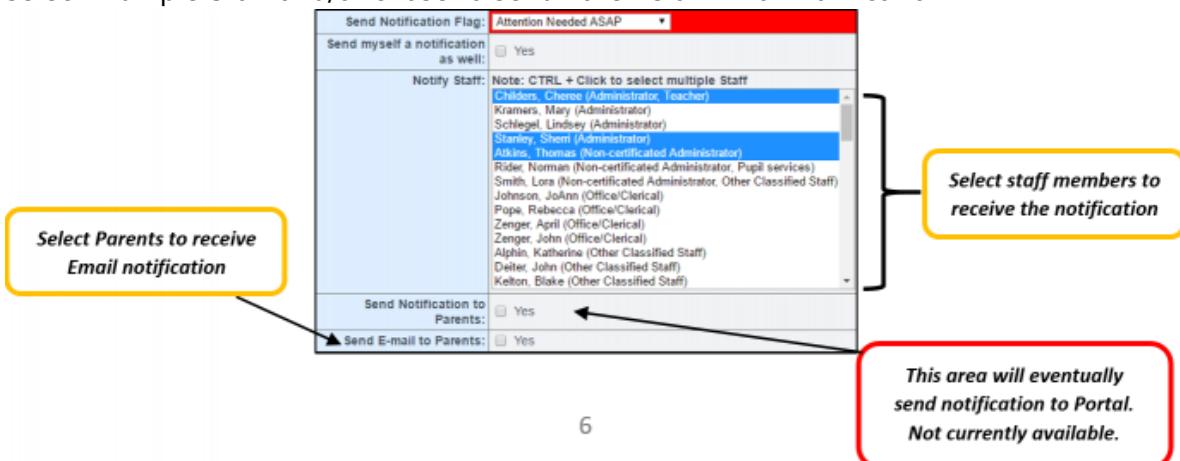
Recent Pages ▾ Enter search text Students

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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.



#### 4. SAVE Contact

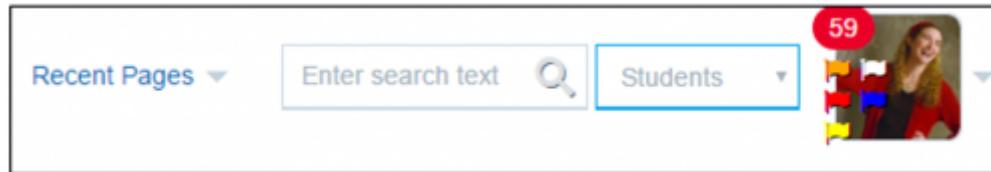
5. Once the contact is saved and you "Show Contacts" for a specific student "Notification Flag Information" the flag notification sent will be noted. You can also clicking on "Edit" of contact saved

#	Creator	Met With	Contact Method	Date	Start	Finish	Duration	Flag	Edit
1	Reeves, LeAnn (leann)	leann	⌚	02/28/2017	12:07 pm	-		🟡	[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	-		🟡	[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	🟢	[Edit] Test
4	Reeves, LeAnn (leann)	leann	⌚Phone	02/23/2017	3:31 pm	-		🟡	[Edit] Missing classes
5	Reeves, LeAnn (leann)	leann	⌚Phone	02/23/2017	8:56 am	-		🔴	[Edit] TEST

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

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: Brenneman, Kathleen	Mon Jul 13, 2015 - 2:02 pm
🔴	Attention Needed ASAP	Staff: Childers, Cheree	Mon Jul 13, 2015 - 2:02 pm

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

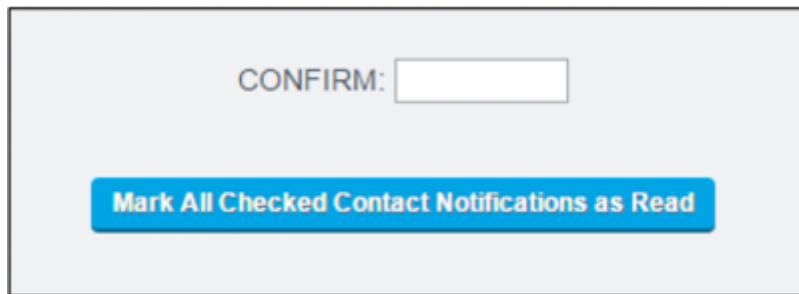


- Hover over the flag for a brief description

3. Click directly on the flag to read notification

Show old/read messages?	<input checked="" type="checkbox"/> Yes			
Show notifications for:	Reeves, LeAnn			
Contact Manager Notifications				
Notifications sent out with contacts will be shown below.				
Date	Sent By	Subject	Message	Flag
02/27/2017 11:28 am	Reeves, LeAnn (LeAnn)	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 Bladock	Student Bladock, Scott
02/27/2017 2:10 pm	Reeves, LeAnn (LeAnn)	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 Child, Daisy

4. 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.



## ADMINISTRATION: SET-UP NOTIFICATION FLAGS

1. To set-up notification flags go to Administration > Settings > Trigger Emails
2. Click on the “Notification Flags” tab

Email Notifications		Notification Flags		Event Triggers	
Icon	Description	Color	Edit		
Flag (Pink)	Emergency	Pink	Edit		
Flag (Red)	Attention Needed ASAP	Red	Edit		
Flag (Orange)	Academic Failure	Orange	Edit		
Flag (Yellow)	Attendance Issues	Yellow	Edit		
Flag (White)	General Information/Counselor	White	Edit		
Flag (Blue)	General Information/Office	Blue	Edit		
Flag (Lime)	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:	Aqua <input type="button" value="▼"/>
<input type="button" value="Back"/>	<input type="button" value="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:	<input type="text"/> <input type="button" value="Add Student"/> <p><b>Note:</b> Adding additional students will create a copy of this contact. Changes need to be done to each contact separately.</p>
Contacted By:	leann
Contacted For:	List for 12th grade
If Vendor Session: Name of Vendor (optional)	<input type="text" value="-- Choose --"/> <input type="text" value="-- Choose --"/>
Specialist Type	<input type="text" value="Caswell, James (Math Tutor)"/>
Area/Subject of Focus:	<input type="text" value="Atkins, Thomas (Driving Instructor)"/> <input type="text" value="Howard, Bill (Driving Instructor)"/> <input type="text" value="Schwartz, George (Occupational Therapist)"/> <input type="text" value="Howard, Sue (Tutors 6-8 Students)"/> <input type="text" value="Howard, Bill (9-12 English Tutor)"/> <input type="text" value="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	
Almond Country Famrs		External	CA	Butte	<input type="button" value="Edit"/>	Show Staff: <input type="checkbox"/>	
English Tutor ABC	English Tutor	External	CA	Sierra	<input type="button" value="Edit"/>	Show Staff: <input type="checkbox"/>	
Math Tutors, Inc.	Tutor	External	CA	Plumas	<input type="button" value="Edit"/>	Show Staff: <input type="checkbox"/>	
Milestone Academy		School	CA		<input type="button" value="Edit"/>	Show Staff: <input type="checkbox"/>	
Occupational Speech Services	Speach Services	External	CA	Plumas	<input type="button" value="Edit"/>	Show Staff: <input type="checkbox"/>	
XYZ Driving School	Vendor Classes	External	CA	Plumas	<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)

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	
Almond Country Famrs		External	CA	Butte	<input type="button" value="Edit"/>	Show Staff: <input type="checkbox"/>	
English Tutor ABC	English Tutor	External	CA	Sierra	<input type="button" value="Edit"/>	Show Staff: <input checked="" type="checkbox"/>	
	Staff Name	Specialist Type	Contacts	Edit			
	Howard, Bill	9-12 English Tutor	1	<input type="button" value="Edit"/>			
	Howard, Sue	Tutors 6-8 Students	0	<input type="button" value="Edit"/>			
				<input type="button" value="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	<input type="button" value="Add Student"/>
Add additional students:		
<p><b>Note:</b> Adding additional students will create a copy need to be done to each contact separately.</p>		
Contacted By:	leann	
Contacted For:	Childers, Cheree (Roster)	
If Vendor Session: Name of Vendor (optional)	<input type="button" value="-- Choose --"/>	
Specialist Type	Administrator	
Area/Subject of Focus:	<input type="button" value="-- Choose --"/>	
Date Contacted:	03/01/2017	<input type="button" value=""/>
Beginning Time:	1:01	<input type="radio"/> AM <input checked="" type="radio"/> PM
End Time:		<input type="radio"/> AM <input type="radio"/> PM
<p><b>Note:</b> If left blank when creating a new contact, the</p>		
Total Time:	Total time in minutes.	
Contact Method?	<input type="button" value="-- 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)	Please set which options can be set for Contact Method in the text field. They must be comma delimited.	
	All Phone E-mail In Person At S	
9. What options can be selected for Area/Subject of Focus? (contactareasubjectoptions)	Please set which options can be set for Area/Subject of Focus in the text field. They must be comma delimited.	
	All Monthly Mtg #1 Monthly Mtg	



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Last update: **2017/03/06 19:17**