

[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

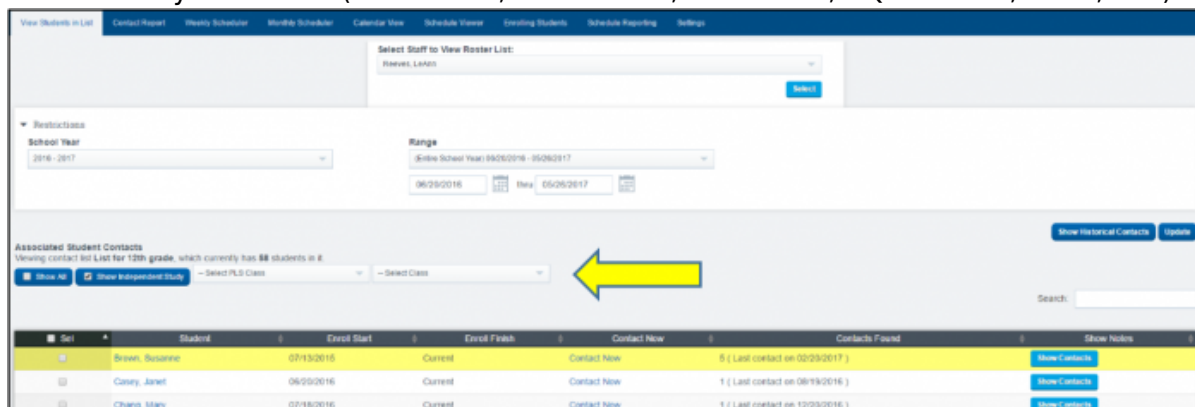
1. If you enter Contact Manager via this route, you have the ability to select and view contacts for any Staff if Security privileges allow

The screenshot shows the Contact Manager interface. At the top, there is a navigation bar with tabs: View Students in List, Contact Request, Weekly Schedule, Monthly Schedule, Calendar View, Student Profile, 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 02/29/2017)	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 12/29/2016)	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.)



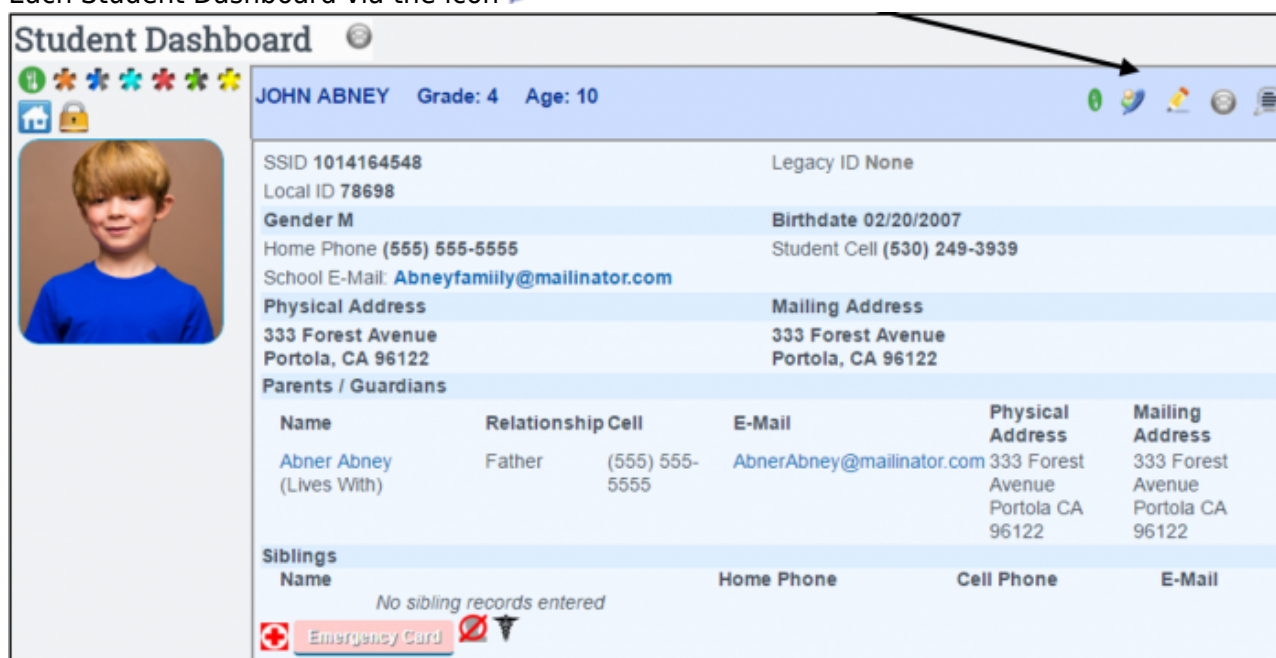
Select Staff to View Roster List:  
Revel, LAMR

Restrictions:  
School Year: 2016 - 2017  
Range: School Year: 09/09/2016 - 09/09/2017  
09/09/2016 to 09/09/2017

Associated Student Contacts  
Viewing contact list for 12th grade, which currently has 88 students in it.  
Show All Show Independent Study - Select PLS Class - Select Class

Student	Enroll Start	Enroll Finish	Contact Now	Contacts Filled	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	07/18/2016	Current	Contact Now	1 (Last contact on 12/23/2016)	Show Contacts

## 3. Each Student Dashboard via the icon



**Student Dashboard**

JOHN ABNEY Grade: 4 Age: 10

SSID 1014164548 Local ID 78698 Legacy ID None

Gender M Birthdate 02/20/2007

Home Phone (555) 555-5555 Student Cell (530) 249-3939

School E-Mail: [Abneyfamily@mailinator.com](mailto:Abneyfamily@mailinator.com)

Physical Address Mailing Address  
333 Forest Avenue 333 Forest Avenue  
Portola, CA 96122 Portola, CA 96122

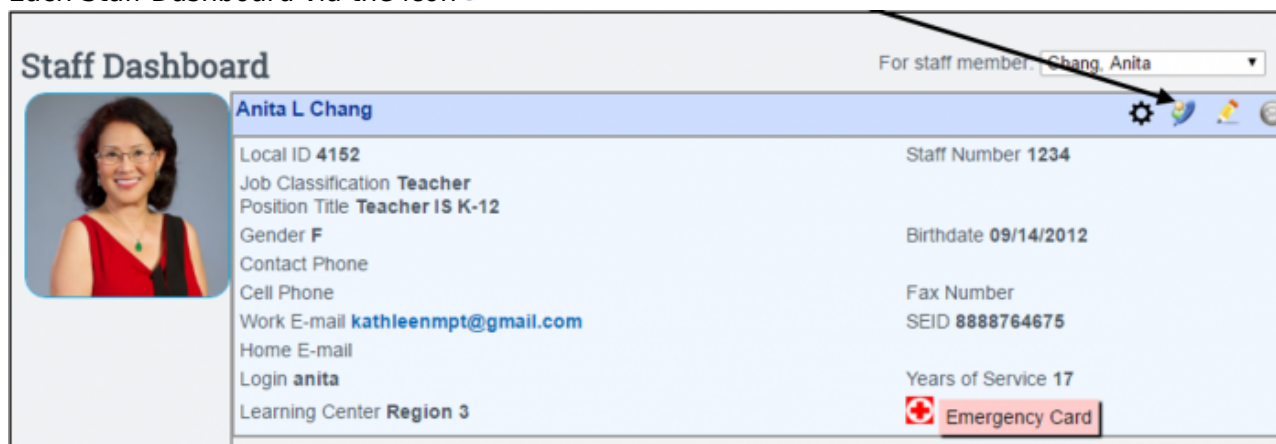
Parents / Guardians

Name	Relationship	Cell	E-Mail	Physical Address	Mailing Address
Abner Abney (Lives With)	Father	(555) 555-5555	<a href="mailto:AbnerAbney@mailinator.com">AbnerAbney@mailinator.com</a>	333 Forest Avenue Portola CA 96122	333 Forest Avenue Portola CA 96122

Siblings  
Name Home Phone Cell Phone E-Mail  
No sibling records entered

Emergency Card

## 4. Each Staff Dashboard via the icon



**Staff Dashboard**

For staff member: Chang, Anita

Anita L Chang

Local ID 4152 Staff Number 1234

Job Classification Teacher

Position Title Teacher IS K-12

Gender F Birthdate 09/14/2012

Contact Phone

Cell Phone

Work E-mail [kathleenmpt@gmail.com](mailto:kathleenmpt@gmail.com) Fax Number

Home E-mail SEID 8888764675

Login anita

Years of Service 17

Learning Center Region 3

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

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**

<b>Contact Student</b>		<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.  
  -- Select Class

**Show contact information**

Set	Student	Enroll Start	Enroll Finish	Contact Now	Contacts Found	Show Notes
<input type="checkbox"/>	Bladeck, Scott	07/18/2016	Current	Contact Now	4 ( Last contact on 02/28/2017 )	<input type="button" value="Show Contacts"/>
<input type="checkbox"/>	Child, Daisy	07/18/2016	Current	Contact Now	5 ( Last contact on 02/28/2017 )	<input type="button" value="Show Contacts"/>
<input type="checkbox"/>	Howard, Bill	07/18/2016	Current	Contact Now	1 ( Last contact on 02/16/2017 )	<input type="button" value="Show Contacts"/>
<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, Garin	07/18/2016	Current	Contact Now		
<input type="checkbox"/>	Mo, Bill	07/18/2016	Current	Contact Now		

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

#	Contact	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

**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
Alney, 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.
Alney, Kristen	11/05/2016	1:14 pm	55 minutes		Reeves, LeAnn	9-12 English Tutor		
Alney, Tamara	02/20/2017	2:55 pm	5 minutes		Reeves, LeAnn	9-12 English Tutor		test/test
Alum, Christian	11/10/2016	9:12 am	--		Schriener, 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
59



- 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.

6

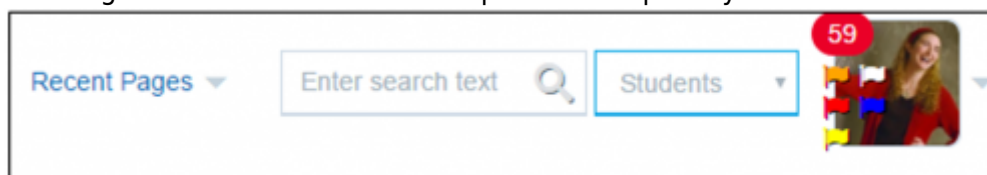
4. SAVE Contact
5. Once the contact is saved and you "Show Contacts" for a specific student "Notification Flag Information" the flag notification sent will be noted. You can also clicking on "Edit" of contact saved

#	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"/> 02/02/2017 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	<a href="#">Edit</a>		
	Attention Needed ASAP	Red	<a href="#">Edit</a>		
	Academic Failure	Orange	<a href="#">Edit</a>		
	Attendance Issues	Yellow	<a href="#">Edit</a>		
	General Information/Counselor	White	<a href="#">Edit</a>		
	General Information/Office	Blue	<a href="#">Edit</a>		
	General Information/Admin	Lime	<a href="#">Edit</a>		
<a href="#">Add New Flag</a>					

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:	<input type="text"/> <input type="button" value="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	-- Choose --
Area/Subject of Focus:	Caswell, James (Math Tutor)
	Atkins, Thomas (Driving Instructor)
	Howard, Bill (Driving Instructor)
	Schwartz, George (Occupational Therapist)
Date Contacted:	Howard, Sue (Tutors 6-8 Students)
	Howard, Bill (9-12 English Tutor)
Beginning Time:	Jones, Sue (Math Tutor)

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	<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	Speech 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"/>
<input type="button" value="Add New Vendor"/> <input type="button" value="Export Vendor List as CSV"/> <input type="button" value="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

SERVICES

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

## 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"/>
	<b>Note:</b> 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
Total Time:	<input type="text"/>
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)	<div>Please set which options can be set for Contact Method in the text field. They must be comma delimited</div> <div>Phone, E-mail, In Person, At S</div>
9. What options can be selected for Area/Subject of Focus? (contactareasubjectoptions)	<div>Please set which options can be set for Area/Subject of Focus in the text field. They must be comma delimited</div> <div>Monthly Mtg #1, Monthly Mtg</div>

## Contact Manager Upload

Schools now have the ability to do an upload of data into Contact Manager by uploading a CSV file containing contact log information.

The Contact Manager upload tool can be found at **Reports > Students > Contact Manager Upload**

You will need to create a CSV file with the column headers pictured below. The red fields are required for a successful load, while the others are optional. Once you have the file ready to upload, click on the Choose File button, browse for the file on your computer, select the file, then click the blue Import button.

## Contact Manager Upload

Example data (red fields are required):

Student ID *	Scope	Contacted By	Contacted For	Date	Start Time	Made Contact?	Subject	Finish Time	Duration (in minutes)	Contact Method	Contact Method Other	Follow Up Required?	Note	Vendor Name	Specialist
123456	milestone	jdoe	Doe, John	1/02/2003	2:00 PM	Yes	Spelling and Handwriting	3:00 PM		Phone			Student was doing fine		
123456	milestone	jdoe	Smith, Sally	1/02/2003	1300	Yes	Electives		30	Other	Ran into student at the grocery store	Yes			

\*If this header is instead "Student Number", you can use the student's number instead of their ID.

Choose File No file chosen

Import

Once the import is complete you will receive a Results page indicating the status of the load, indicating successfully loaded records as well as any errors encountered during the load.

## Contact Manager Upload Results

Color Key
Successfully loaded
Unrecognized column name
Duplicate column name
Error

Load completed

Student ID	Scope	Contacted By	Contacted For	Date	Start Time	Made Contact?	Subject	Finish Time	Duration (in minutes)	Contact Method	Contact Method Other	Follow Up Required?	Note	Vendor Name	Specialist	Completion Status
78897	milestone	jeann	Children, Chicago	4/25/2018	3:00 PM	Yes	English		60	Phone			Discussed progress on English essay			Success
79003	milestone	jeann	Children, Chicago	4/25/2018	3:00 AM	Yes	Electives		30	Email		Yes	Shared a list of CTC Class options			For this ID contact method "Email" does not match any existing methods, and no method other was sent, stopping.
79081	milestone	jeann	Children, Chicago	4/25/2018	10:00 AM	Yes	Math		60	Phone			Student will be attending tutoring weekly			Success

From:

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

Permanent link:

[https://schoolpathways.com/knowledgebase/doku.php?id=plsis:contact\\_manager&rev=1541620605](https://schoolpathways.com/knowledgebase/doku.php?id=plsis:contact_manager&rev=1541620605)

Last update: **2018/11/07 19:56**