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

Contact Manager

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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

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.)


3. Each Student Dashboard via the icon

4. Each Staff Dashboard via the icon

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.

- Enter all relevant information to the contact and "SAVE CONTACT"

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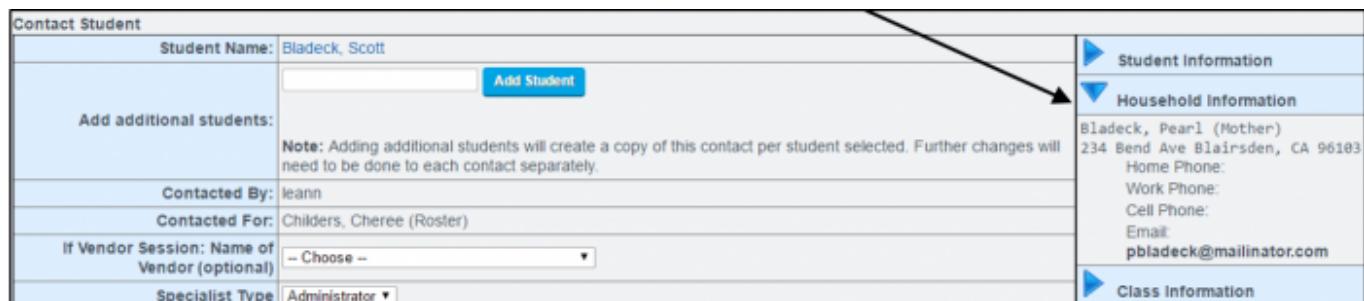
- After your contact is saved, you can return to your roster to view all contacts. Click the "Show Contacts" box to expand and view/read any contacts made for any student. Contacts may be printed for individual student or a group of selected students.

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

Show 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	11/09/2016	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		testtesttest
Akuni, Christian	11/10/2016	9:12 am	--		Schlegel, Lindsey	9-12 English Tutor		Test for email
Alcala, Jessica	02/20/2017	2:55 pm	5 minutes		Reeves, LeAnn	9-12 English Tutor		testtesttest
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.
Baty, George	10/11/2016	8:24 am	1 hour and 0 minutes	In-Person	Chang, Anita	9-12 English Tutor	Monthly Mtg #1	Meet 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 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 ▼   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)
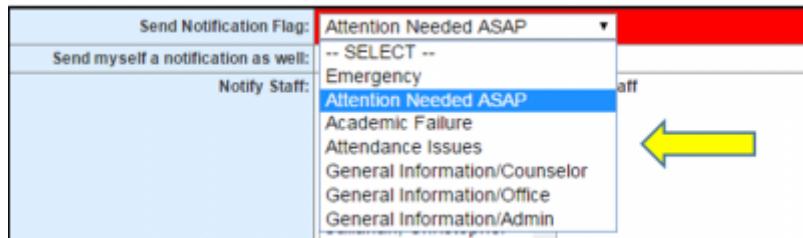
  3. Select staff members to notify. Multiple staff may be selected by holding CTRL + Click to select multiple Staff and/or chose to send Parents an Email notification.
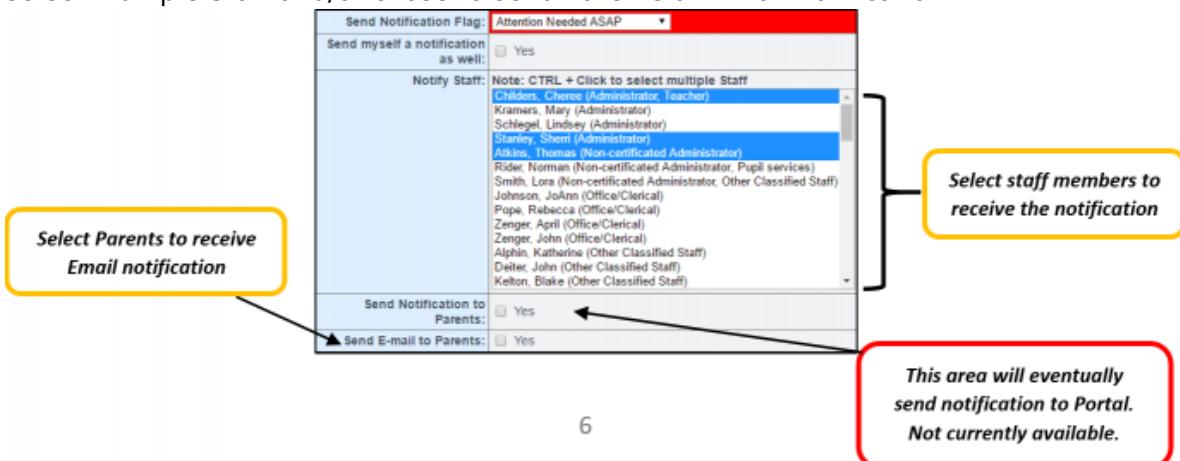
  4. SAVE Contact
  5. Once the contact is saved and you "Show Contacts" for a specific student "Notification Flag Information" the flag notification sent will be noted. You can also clicking on "Edit" of contact saved

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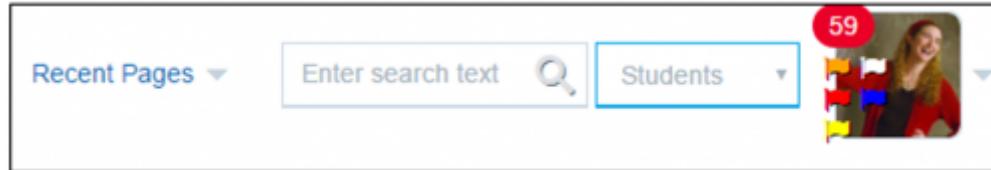
  - Hover over the flag for a brief description
  3. Click directly on the flag to read notification

  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.
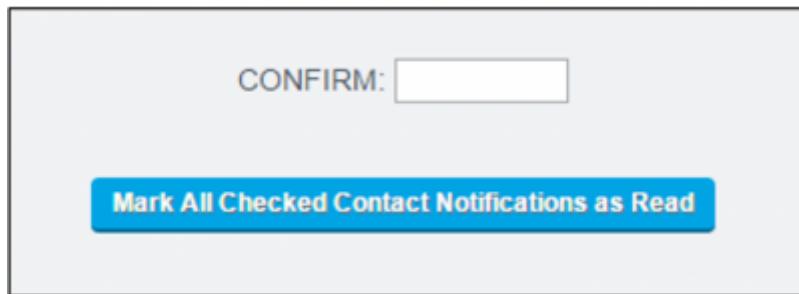
Administration: Set Up Notification Flags

1. To set-up notification flags go to Administration > Settings > Trigger Emails
2. Click on the "Notification Flags" tab
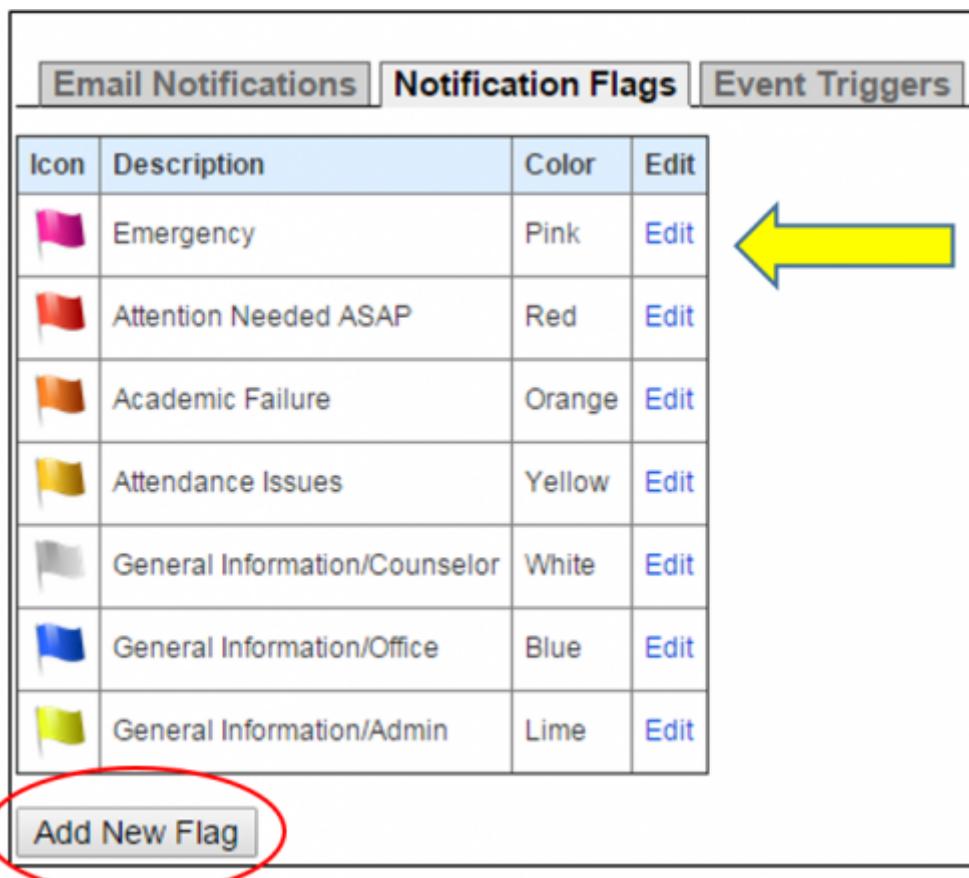
3. You may "Edit" the default flags that are available or.....
4. Click "New Flag", enter flag description, select color, and "Save Flag Settings"

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.

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

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

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"

- 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"

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.

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.