

[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 Report, 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'. There are 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 row has 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.)

The screenshot shows the 'Contact Manager' interface. At the top, there's a navigation bar with options like 'View Students in List', 'Contact Report', 'Weekly Schedule', 'Monthly Schedule', 'Calendar View', 'Schedule Viewer', 'Enrolling Students', 'Schedule Reporting', and 'Settings'. Below this, there's a 'Select Staff to View Roster List' dropdown menu with 'Renee LARIN' selected. A 'Select' button is next to it. Below that, there's a 'Restrictions' section with 'School Year' set to '2016 - 2017' and a 'Range' dropdown set to 'Enroll School Year: 06/01/2016 - 05/31/2017'. There are also date pickers for 'From' (06/01/2016) and 'To' (05/31/2017). Below this is the 'Associated Student Contacts' section, which says 'Viewing contact list for 12th grade, which currently has 88 students in it'. There are buttons for 'Show All', 'Show Independent Study', and a 'Select PLS Class' dropdown menu. A yellow arrow points to this dropdown. To the right of the dropdown are buttons for 'Show History of Contacts' and 'Update'. 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 02/23/2017) | Show Contacts |
| Caney, Janet | 06/29/2016 | Current | Contact Now | 1 (Last contact on 06/19/2016) | Show Contacts |
| Chang, Mary | 07/16/2016 | Current | Contact Now | 1 (Last contact on 12/23/2016) | Show Contacts |

3. Each Student Dashboard via the icon

The screenshot shows the 'Student Dashboard' for John Abney. At the top, it says 'JOHN ABNEY Grade: 4 Age: 10'. Below this is a profile picture of a young boy. To the right of the picture are several icons, including a student icon. A black arrow points to this student icon. Below the profile picture, there's a section for 'SSID 1014164548' and 'Local ID 78698'. Below that, there's a section for 'Gender M' and 'Birthdate 02/20/2007'. Below that, there's a section for 'Home Phone (555) 555-5555' and 'Student Cell (530) 249-3939'. Below that, there's a section for 'School E-Mail: Abneyfamily@mailinator.com'. Below that, there's a section for 'Physical Address' and 'Mailing Address', both showing '333 Forest Avenue Portola, CA 96122'. Below that, there's a section for 'Parents / Guardians' with a table showing 'Abner Abney (Lives With)' as the father, with contact information. Below that, there's a section for 'Siblings' with a table showing 'No sibling records entered'. At the bottom, there's a red 'Emergency Card' button.

4. Each Staff Dashboard via the icon

The screenshot shows the 'Staff Dashboard' for Anita L. Chang. At the top, it says 'Anita L. Chang'. Below this is a profile picture of a woman. To the right of the picture are several icons, including a staff icon. A black arrow points to this staff icon. Below the profile picture, there's a section for 'Local ID 4152' and 'Staff Number 1234'. Below that, there's a section for 'Job Classification Teacher' and 'Position Title Teacher IS K-12'. Below that, there's a section for 'Gender F' and 'Birthdate 09/14/2012'. Below that, there's a section for 'Contact Phone' and 'Fax Number'. Below that, there's a section for 'Work E-mail kathleenmpt@gmail.com' and 'SEID 8888764675'. Below that, there's a section for 'Home E-mail' and 'Years of Service 17'. Below that, there's a section for 'Login anita' and 'Learning Center Region 3'. At the bottom, there's a red 'Emergency Card' button.

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

| 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

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 Student

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): -- Choose --

Specialist Type: Administrator

Area/Subject of Focus: -- Choose --

Date Contacted: 02/28/2017

Beginning Time: 3:18 AM

End Time: AM

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?: -- Choose --

Successfully Made Contact?: Yes No

Follow up Required?: Yes

Notes:

Save Contact

Send Notification Flag: -- SELECT --



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

Contact Student

Student Name: Bladeck, Scott

Add additional students: [Add Student](#)

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) -- Choose --

Specialist Type: Administrator

Student Information

Household Information

Bladeck, Pearl (Mother)
234 Bend Ave Blairsden, CA 96103
Home Phone:
Work Phone:
Cell Phone:
Email: pbladeck@mailinator.com

Class Information

- 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 To 05/26/2017

Associated Student Contacts

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

[Show All](#) [Show Independent Study](#) -- Select Class

[Show contact information](#)

Search:

| 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) | Show Contacts |
| <input type="checkbox"/> | Child, Daisy | 07/18/2016 | Current | Contact Now | 5 (Last contact on 02/28/2017) | Show Contacts |
| <input type="checkbox"/> | Howard, Bill | 07/18/2016 | Current | Contact Now | 1 (Last contact on 02/16/2017) | Show Contacts |
| <input type="checkbox"/> | Hove, 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, Garret | 07/18/2016 | Current | Contact Now | | |
| <input type="checkbox"/> | 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 05/26/2017

Search:

| # | Contact | Met With | Contact Method | Date | Start | Finish | Duration | Flag | Edit | Note |
|---|-----------------------|----------|----------------|---------------------|---------|-----------|----------|--------|--------|---|
| 1 | Reeves, LeAnn (leann) | leann | Phone | 02/28/2017 12:37 pm | - | - | - | Yellow | [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 | - | - | - | 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 (leann) | leann | Phone | 02/23/2017 8:40 am | 8:41 am | 1 minutes | - | Green | [Edit] | Test |
| 4 | Reeves, LeAnn (leann) | leann | Phone | 02/23/2017 3:31 pm | - | - | - | Yellow | [Edit] | Missing classes |
| 5 | Reeves, LeAnn (leann) | leann | Phone | 02/23/2017 8:56 am | - | - | - | Yellow | [Edit] | 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 | -- | | 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

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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)

Send Notification Flag: Attention Needed ASAP

Send myself a notification as well: -- SELECT --

Notify Staff: Emergency, Attention Needed ASAP, Academic Failure, Attendance Issues, General Information/Counselor, General Information/Office, General Information/Admin

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.

Send Notification Flag: Attention Needed ASAP

Send myself a notification as well: ☐ Yes

Notify Staff: Note: CTRL + Click to select multiple Staff

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

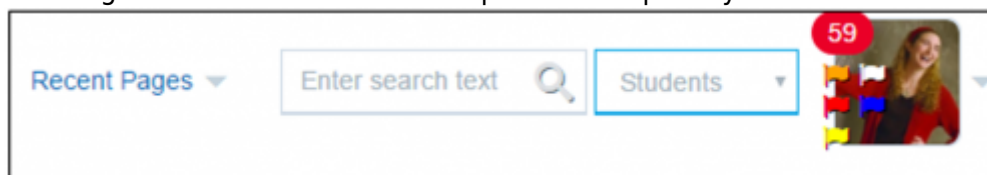
| # | Creator | Met With | Contact Method | Date | Start | Finish | Duration | Flag | Edit | |
|---|-----------------------|----------|----------------|------------|----------|---------|-----------|-----------------------|--------|---|
| 1 | Reeves, LeAnn (leann) | leann | Phone | 02/28/2017 | 12:07 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: 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? ☐ Yes

Show notifications for:

Reeves, LeAnn

Administrative: (Manage Banner Notifications)

Contact Manager Notifications

Notifications sent out with contacts will be shown below:

| Send | Sent By | Subject | Message | Flag | Student |
|--|------------------------|---|--|------|----------------|
| <input type="checkbox"/> 02/07/2017 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 Bladock | | Bladock, Scott |
| <input type="checkbox"/> 02/07/2017 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: Dany Child | | Child, Dany |









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.

CONFIRM:

Mark All Checked Contact Notifications as Read

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 | | |
|  | 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 | | |
| <div style="border: 1px solid black; border-radius: 10px; padding: 5px; display: inline-block;">Add New Flag</div> | | | | | |

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 ▼ |

[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 |
|------------------------------|-----------------|-------------|-------|--------|------|--------------------------------------|
| 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"/> <button>Add Student</button> 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 -- |

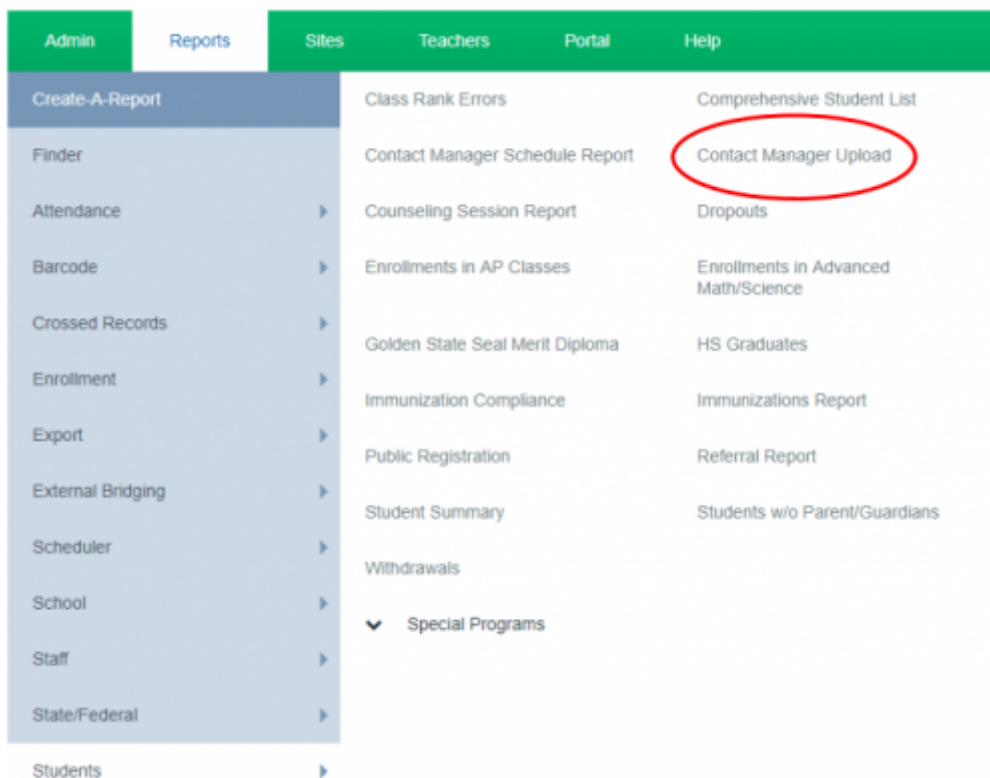
- Access School Policies via Admin > Settings > Policies > Contact Manager - click to show policies
- See policies #8 and #9. Enter custom list with no commas or spaces. Then “Set Preferences”

| | | |
|--|--|--------------------------------------|
| 8. What options can be selected for Contact Method? (contactmethodoptions) | Please set which options can be set for Contact Method in the text field. They must be comma delimited. | All Phone, Email, 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 |

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.

• **General Header Notes:**

- **Student ID:** Local ID or **Student Number** - Legacy/External ID
- **Contacted By:** Username of the person that is doing the upload and pushing the upload button
Example: jdoe
- **Contacted For:** The staff member for which you are loading contacts. It could be the Homeschool Teacher, Counselor, yourself, etc. Spell out the staff name in the following format: Last Name, First Name. This will tag the Staff Name in the log for the student under "Contacted For".
- If there is a **Duration** entered, there is no need to enter **Finish Time**. Only **Start Time** is required.
- IF there is **NO Duration** entered then you would need to have both a **Start Time** and **Finish Time**. The Duration will then be populated on load.



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.

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 | leann | Childers, Cheree | 4/25/2018 | 3:00 PM | Yes | English | | 60 | Phone | | | Discussed progress on English essay | | | Success |
| 79009 | milestone | leann | Childers, Cheree | 4/25/2018 | 9:00 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 | leann | Childers, Cheree | 4/25/2018 | 10:00 AM | Yes | Math | | 60 | Phone | | | Student will be attending tutoring weekly | | | Success |

Sample Upload:

| 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 | Note |
|------------|-----------|--------------|------------------|-----------|------------|---------------|-----------|-------------|-----------------------|----------------|----------------------|-----------|---|
| 78897 | milestone | leann | Childers, Cheree | 4/25/2018 | 3:00 PM | Yes | English | | 60 | Phone | | | Discussed progress on English essay |
| 79009 | milestone | leann | Childers, Cheree | 4/25/2018 | 9:00 AM | Yes | Electives | | 30 | Email | | Yes | Shared a list of CTC Class options |
| 79081 | milestone | leann | Childers, Cheree | 4/25/2018 | 10:00 AM | Yes | Math | | 60 | Phone | | | Student will be attending tutoring weekly |

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