



# Contact Manager

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# Contact Manager

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:

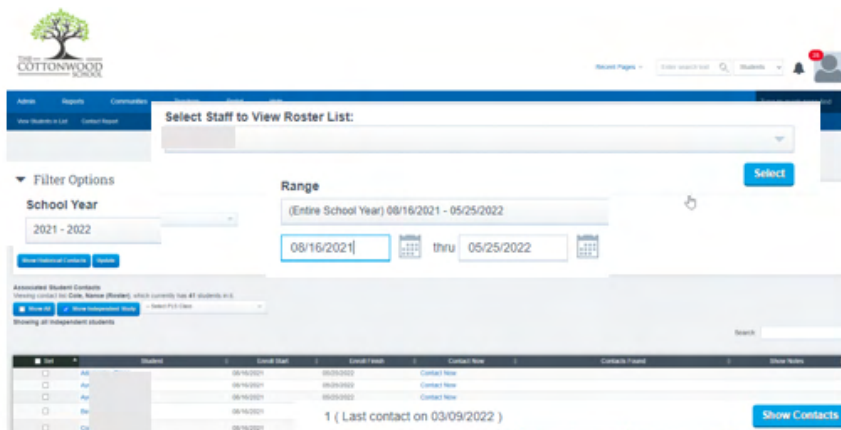
- Time spent with the student (minutes, hours). This can be documented in the past or automatically in the present.
- Any type of educational activity can be tracked: phone, in-person, class time, small group instruction, tutoring, email, etc.
- Time and subject matter information can be left for every 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  
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  
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 a navigation menu on the left with options: Reports, Communities, Teachers, Manage Curricula, Chronic Absenteeism, PLS/Student Roster, School Activities, CMS - Classroom Management, Compliance, and Contact Manager. A red arrow points to 'Contact Manager'. To the right, the 'School Year' dropdown is set to '2021 - 2022'. Below it are 'Show Historical Contacts' and 'Update' buttons. The 'Associated Student Contacts' section shows 'Viewing contact list' and buttons for 'Show All' and 'Show Independent Study'. A dropdown menu is open with '-- Select PLS Class' selected, and a red arrow points to it.

3. Each Student Dashboard via the icon:

The screenshot shows a 'Student Dashboard' for a student with the following details: Grade: 10, Age: 15, SSID: 5345434337, Local ID: 15629, Legacy ID: None, District: UNRESOLVED. There is a red 'Emergency Card' button. Below the details are several icons for actions: Student Portal, Medical Issues, Archives, Work Permits, Set Login, Custody Issues, Progress by LP, Contact Manager (highlighted with a yellow arrow), Accomodations, and Learning Logs.

4. Each Staff Dashboard via the icon:

The screenshot shows a 'Staff Dashboard' for a staff member with the following details: Classification: Office/Clerical, Position: Lending Library Coordinator, Local ID: 892, Staff Number: 1463834020. There is a red 'Emergency Card' button. Below the details are several icons for actions: Set Login, Medical Issues, Gradescale Settings, View Attendance, and Contact Manager (highlighted with a yellow arrow). There is also a 'Tags' button at the bottom left.



## Create Contacts for Certain 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, Chere (Roster), which currently has 25 students in it

Show All Show Independent Study - Select Class

Set	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 02/15/2017 )
<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 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: [Name]

Contacted For: Childers, Chere (Roster)

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

Specialist Type: Administrator

Area/Subject of Focus: -- Choose --

Date Contacted: 02/28/2017

Beginning Time: 3:10 AM

End Time: [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?: -- 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](#)

**Noted:** 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, Chere (Roster)

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

**Specialist Type:** Administrator

**Student Information**

**Household Information**

Bladeck, Pearl (Mother)  
234 Bend Ave Blairnsden, 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:** -- Monthly Specified --  
06/02/2016 - 05/26/2017

**Associated Student Contacts**

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

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

[Show Historical Contacts](#) [Update](#)

**Show contact information**

Student	Enroll Start	Enroll Finish	Contact Now	Contacts Found	Show Notes
Bladeck, Scott	01/18/2016	Current	Contact Now	4 (Last contact on 02/08/2017)	<a href="#">Show Contacts</a>
Chae, Daisy	01/18/2016	Current	Contact Now	5 (Last contact on 02/08/2017)	<a href="#">Show Contacts</a>
Howard, SB	01/18/2016	Current	Contact Now	1 (Last contact on 02/16/2017)	<a href="#">Show Contacts</a>
Moss, Anna	01/18/2016	Current	Contact Now		
Lee, Carol	01/18/2016	Current	Contact Now		
Lloyd, Dan	01/18/2014	06/17/2016	Contact Now		
Lloyd, Ganes	01/18/2016	Current	Contact Now		
Mu, SB	01/18/2016	Current	Contact Now		

[Create Contacts for Selected Students](#) [Print Contacts for Selected Students](#) [Export CSV for Selected Students](#)

Showing 6 contacts for Child, Daisy made between 06/02/2016 and 05/26/2017

#	Contact	Met With	Contact Method	Date	Start	Finish	Duration	Tag	Call	Note
1	Reviews, LeAnn (leann)	leann	Phone	02/08/2017	12:07 pm	-	-	[S4]		Student did not attend monthly meeting. Please call teacher to discuss.
2	Reviews, LeAnn (leann)	leann	At School Site	02/27/2017	3:29 pm	-	-	[S4]		Student did not attend English tutoring today, missing several assignments. Please call teacher to schedule a meeting to discuss class attendance issues.
3	Reviews, LeAnn (leann)	leann	Phone	02/23/2017	8:40 am	8:41 am	1 minutes	[S4]		test
4	Reviews, LeAnn (leann)	leann	Phone	02/23/2017	3:31 pm	-	-	[S4]		Missing classes.
5	Reviews, LeAnn (leann)	leann	Phone	02/03/2017	8:56 am	-	-	[S4]		TEST

[Print Contacts for this Student](#)

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

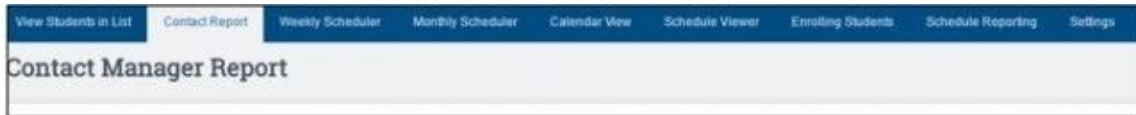
**Edit contact information**

**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



### Contact Manager Report

**Restrictions**

**Learning Center**

**School Year**

**Range**  
  
 thru

**Other Options**

**Export**  
 CSV

**Show Zero Duration**  
 Show contacts with zero duration and/or contacts failed to be made

**Display Type**

**Teacher Student Met With**

**Assigned Teacher**

**Student**

**Vendor Staff**

**Subject or Area of Focus**

**Contact Method**

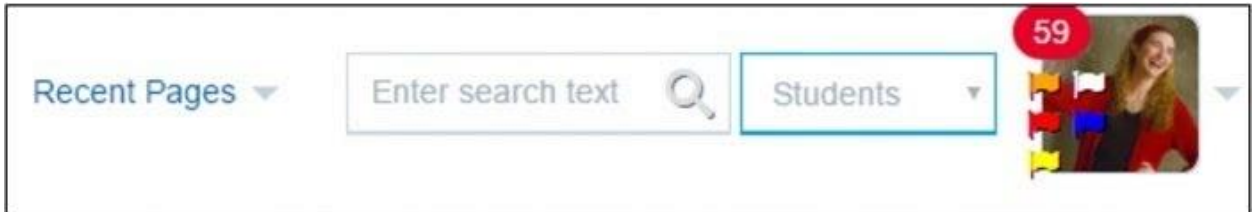
**Note Search**

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's 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	7-12 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.
Abney, Kristen	11/09/2016	1:14 pm	30 minutes		Reeves, LeAnn	9-12 English Tutor		Interfered
Abney, Tamara	02/26/2017	2:53 pm	0 minutes		Reeves, LeAnn	9-12 English Tutor		Interfered
Aburn, Christine	11/10/2016	9:12 am	--		Irishgale, Lindsey	7-12 English Tutor		Text for email
Acosta, Jessica	03/20/2017	2:59 pm	5 minutes		Reeves, LeAnn	9-12 English Tutor		Interfered
Ashcroft, August	07/22/2016	9:09 am	1 hour and 0 minutes	In-Person	Reeves, LeAnn	Math Tutor	Mathematics	
Askins, Ashton	11/08/2016	11:01 am	1 hour and 0 minutes	At School Site	Reeves, LeAnn	9-12 English Tutor	Monthly Mtg #2	Student is having an internal work. Struggling with several of his classes. In danger of academic failure.
Baly, George	10/11/2016	8:24 am	1 hour and 5 minutes	In-Person	Chang, Anita	9-12 English Tutor	Monthly Mtg #1	Met to discuss LPI 4 work. Student turned in work for LPI 3. Review math work and discussed setting up regular weekly tutor sessions. Give student updated AWW.
	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 vlt.
	10/24/2016	9:28 pm	--	At School Site	Chang, Anita	9-12 English Tutor	Mathematics	Student did not attend on site math class.
	11/03/2016	9:30 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.

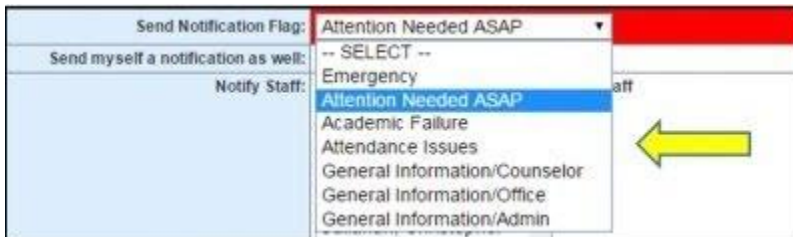


## How do I Send Contact Manager Notifications?

- 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.



- 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.

6

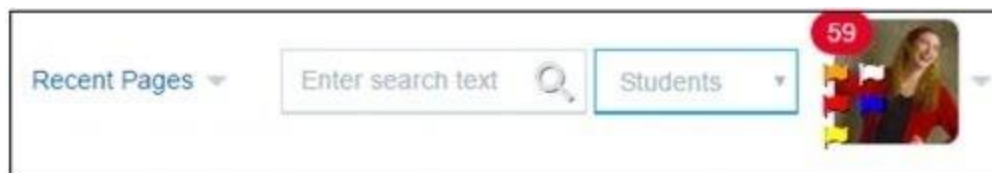
4. SAVE Contact
5. Once the contact is saved and you “Show Contacts” for a specific student “Notification Flag Information” the flag notification sent will be noted. You can also clicking on “Edit” of contact saved

#	Creator	Met With	Contact Method	Date	Start	Finish	Duration	Flag	Edit	Description
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 minute		[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*

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: Chiders, 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



6. Click directly on the flag to read notification

Show old thread messages?  Yes  
Show notifications for: Reeves, LeAnn

Administrative: (Message Server Notifications)

### Contact Manager Notifications

Notifications sent out with contacts will be shown below.

Date	Sent By	Subject	Message	Flag	Student
02/23/2017 11:26 AM	Reeves, LeAnn (leann)	Contact Notification: Attendance Issues	A Contact was created with the following note: TEST AGAIN 2/23/17 Message sent by Reeves, LeAnn For student: Scott Stascek	<input type="checkbox"/>	Stascek, 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: Daley, Chad	<input type="checkbox"/>	Daley, Chad

7. 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

Icon	Description	Color	Edit
	Emergency	Pink	Edit
	Attention Needed ASAP	Red	Edit
	Academic Failure	Orange	Edit
	Attendance Issues	Yellow	Edit
	General Information/Counselor	White	Edit
	General Information/Office	Blue	Edit
	General Information/Admin	Lime	Edit

**Add New Flag**



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

Notifications & Flagging - Create New Flag

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



# Administration: Contact Manager School Policies

1. 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. 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 <input type="button" value="Calendar"/>
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 <b>Note:</b> If left blank when creating a new contact, the contact will end at the beginning time.
Total Time:	<input type="text"/> Total time in minutes.
Contact Method?	-- Choose --

2. Access School Policies via Admin > Settings > Policies > Contact Manager – click to show policies
3. 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? (contactareasubjoptions)	Please set which options can be set for Area/Subject of Focus in the text field. They must be comma delimited.	All Monthly 15g #1, Monthly 15g

