EDPlan Contacts Wizard

The new contact wizard will provide a convenient way to document contacts for multiple students. Currently, parent contacts are entered on a student by student basis. The new Contact wizard will allow users to select multiple students and log contacts in succession without having to visit the students' individual Contacts page.
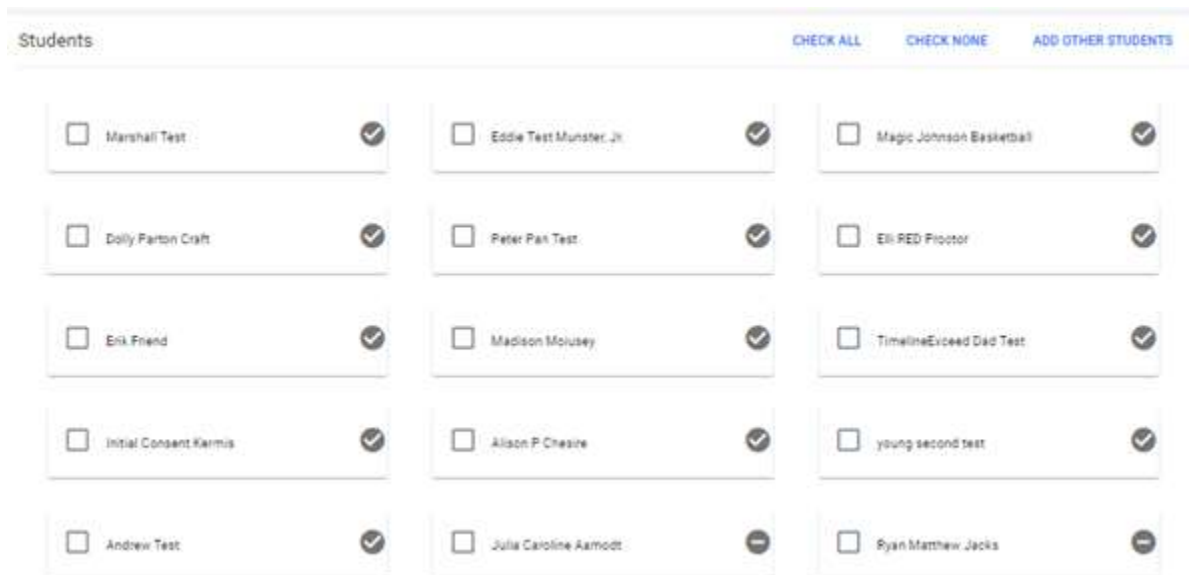
How to Access and Use the new Contact Wizard

➢ On the green menu bar, select Wizards.

Select the Contacts Wizard.

Users with a caseload (special education teacher, related service provider, etc.), will see all students on their caseload.

The ✓ symbol indicates the student has parents listed on the Parent/Team page. The ⊖ symbol indicates there are no parents on the student's Parent/Team page. You'll need to return to the student's Parent/Team page and add parent information in order to add contacts through the wizard.

Users may check all of the students on the caseload, or select specific students to log contacts. Click 'Launch Wizard.'

Click 'Add A Contact' and select either Parent Contact or Other Contact. Note: 'Other Contact' is used when the parent initiates the contact with the district, 'Parent Contact' is used when the district initiates the contact with the parent.

Enter the contact details and click 'Save.' Click the 'Next' button to advance to the next student.

Test, Adam

Contacts   ADD A CONTACT

Del	Contact With	Contacting Person	Person Contacted	Contact Method	Contact Date	Contact Result	Document	Details
☐	Parent	test	Dad Test	Letter	05/01/2018	Direct Conversation	OK Eligibility - RED	✎
☐	Parent	Teacher Test	test	Email	09/01/2020	Progress report sent to parent		✎
☐	Other	Mom Test	School Counselor Test	Phone Call	09/07/2020	Direct Conversation		✎

SAVE

NEXT

Group Logging

Group Logging allows you to enter contact information and apply that information to all students the user has included in the wizard. One example of group logging would be when progress reports are sent to parents.

Click 'Launch Group Wizard.'

Enter contact details and click 'Continue.'

The first student in your list will appear. Click 'Add a Contact.'

The Contact panel will open with the information you entered on Contact Details, enter the person contacted and notes, if appropriate, and Save.

Click 'Next' to advance to the next student in the list, and repeat the process described above to add the contact to the next student.

Users with no caseload (EDPlan district administrators)

If you do not have a caseload, you may add students to the wizard.

Click 'Add Other Students' and enter a last name in the search field. Click 'View Students.'

You will see a list of students matching the search criteria.

Check the students to be included in the wizard and click 'Add Students.' You may then launch the wizard, following the steps outlined above to add contacts for each student.