

## 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

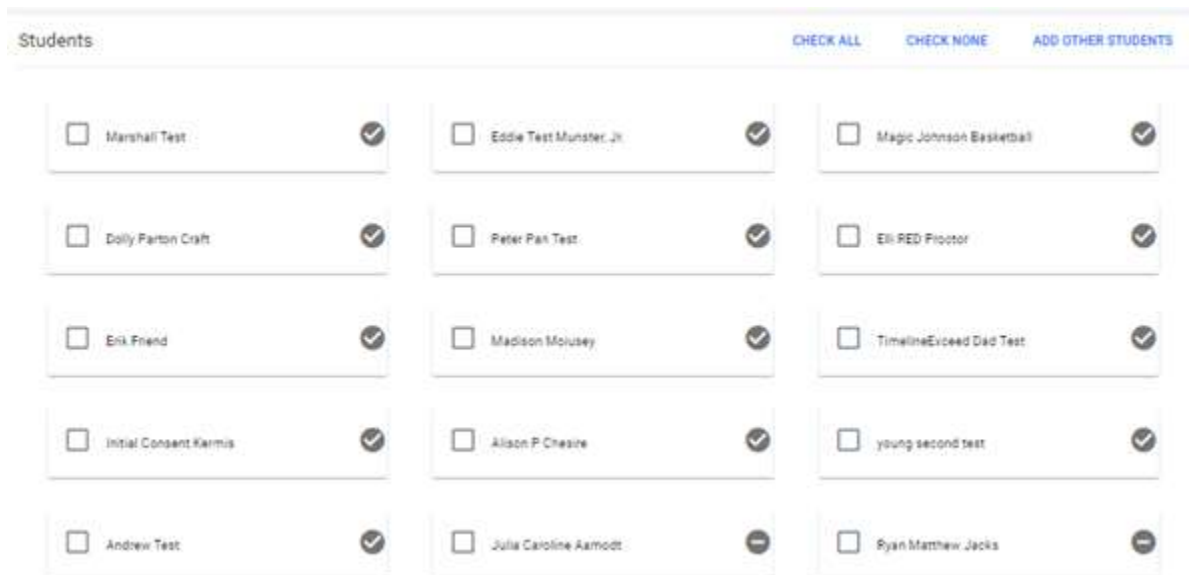
- On the green menu bar, select Wizards.





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.



LAUNCH WIZARD

Contact Details

✕

This new contact is a:

☐ Parent Contact

☒ Other Contact

Person Making Contact

(Required)

Person Contacted

(Required)

External Contact Person

Contact Result

▼

Notes

Contact Method

(Required)




Contact Date

mm/dd/yyyy

(Required)

SAVE

Test, Adam

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

## 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.'

Students
CHECK ALL
CHECK NONE
ADD OTHER STUDENTS

<input checked="" type="checkbox"/> Test, Adam	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Test, Angela	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Test, Barb	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Test, Bryant	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Test, Eddie	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Test, Frederick	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Test, Grace	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Test, Jay	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Test, Joshua	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Test, Kylie	<input type="checkbox"/>				

LAUNCH GROUP WIZARD
LAUNCH WIZARD

Enter contact details and click 'Continue.'

### Contact Details

This new contact is a:
☒ Parent Contact
☐ Other Contact

Person Making Contact  
Teacher Test

Contact Method  
Email

Contact Date  
09/01/2020

Contact Result  
Progress report sent to parent

☐ Parent Initiated Contact

Notes

CONTINUE

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

Test, Adam

Contacts ADD A CONTACT

[Active Contacts](#) [Inactive Contacts](#)

Del	Contact With	Contacting Person	Person Contacted	Contact Method	Contact Date	Contact Result	Document	Details
<input type="checkbox"/>	Parent	test	Dad Test	Letter	05/01/2018	Direct Conversation	OK Eligibility - RED	

SAVE NEXT

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

Contact Details ×

This new contact is a:

☒ Parent Contact ☐ Other Contact

Person Making Contact  
Teacher Test

Person Contacted (Required) ▼

Contact Method  
Email ▼

Contact Date  
09/01/2020

Contact Result  
Progress report sent to parent ▼

☐ Parent Initiated Contact

Notes

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.

Students [CHECK ALL](#) [CHECK NONE](#) ADD OTHER STUDENTS

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

## Student Search



First Name

First Name

Last Name

Test

Student ID

Student ID

State Testing Number (STN)

State Testing Number (STN)

Grade



School



**VIEW STUDENTS**

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

## Student Search

### Search Results



Please note you are only seeing the first 75 results

Add	Name	Student ID	State Testing Number (STN)	Grade	School	Has Parents
<input type="checkbox"/>	Test, Aaliyah	6527M		Sophomore	Fred Flinstone School of Rock	No
<input checked="" type="checkbox"/>	Test, Adam	TESTADAM	TEST3321	3rd Grade	Sample School	Yes
<input type="checkbox"/>	Test, Ali	6527L	1101524109	Freshman	Sample School 4	Yes
<input type="checkbox"/>	Test, Alicia	77771111		3rd Grade	Sample School	Yes
<input type="checkbox"/>	Test, Amanda	AT5436		Kindergarten	Sample School	Yes
<input checked="" type="checkbox"/>	Test, Andrew	262626		Pre-Kindergarten	Test School	Yes
<input type="checkbox"/>	Test, Angela	Q35Q358ERG8Q435	OK	4th Grade	Sample School	Yes
<input type="checkbox"/>	Test, Arysa	999946859	1001361446	Kindergarten	Test School	Yes
<input checked="" type="checkbox"/>	Test, Ashley	661923999	1001179999	Kindergarten	Sample School	Yes
<input type="checkbox"/>	Test, August	123123	123124235235	6th Grade	Sample School 4	Yes
<input checked="" type="checkbox"/>	Test, Avery	774455	STN1982030	4th Grade	Sample School	Yes
<input type="checkbox"/>	Test, Barb	BBB12239ET93459	13041835402456000000	Pre-Kindergarten	Sample School	Yes
<input checked="" type="checkbox"/>	Test, Baxter	1211994	123000	Un-graded	Fred Flinstone School of Rock	Yes
<input type="checkbox"/>	Test, Berkli	00000030		4th Grade	Sample School	Yes
<input type="checkbox"/>	Test, Bill	454564	1009999999	5th Grade	Sample2 School	Yes

**ADD STUDENTS**

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.