

# How to Record a Contact in a Student's Contact Log

***First follow these steps to find the student:***

1. Select 'Service Case' from the **Search** menu
2. **Service Type:** Participant
3. Enter name of student under
  - **English First Name**
  - **English Last Name**
4. Click **Search**
5. Click on the name under **Applicant**

No.	IOC	Program Code	Dest IOC.	Service Ref.	Assigned To	Applicant	Service Info	Source	Online App	Placement (F,O,T)	
1	USA	YPscNH11	DEN	11-00840	Area Team: Miss Tennky Area Team	testnattyLENS, testnattylens (testnattyLENS, testnattylens)	Sending- Application-Open	OA	School Based, Short Summer and University Programs FullApp / Preparing	(0, 0, 0)	

***Next, follow these steps to locate your Contact Log:***

6. Click on "Contact Log" from the toolbar
7. Click on **Create Contact Log**

## Person: Person Detail

**Find Duplicate**

### Person Detail

IOC : USA      Person Ref. : 11-01797  
Name : testnattylens testnattyLENS (testnattylens testnattyLENS)  
Person information is visible to volunteer

7 **Create Contact Log**    Compose E-mail    6 **Contact Log (14)**    Affiliation (0)    Login Account    Person Award

(Continued on next page)

**Fill in the following fields:**

8. **Contact Type:** Sending

9. **Contact Sub Type:** Pick one of the following that most accurately describes your method of communication:

Phone - Inbound	For calls received from the applicant or the applicant's family
Phone - Outbound	For calls made to the applicant, the applicant's family, or the applicant's advisor
Email	For an email to or received from applicant (paste into <b>Contact Detail</b> )
Email - Bulk	For sending generic emails to a group of applicants. For example, an invitation to a PDO
Comment	For making note of something about the applicant that doesn't result from one-to-one contact. For example, "I am unsure if student is ready. Will call her tomorrow."
Personal Visit	For visits in-person with the applicant and/or the applicant's family

10. **Subject:** Summary of the details

11. **Contact Details:** Who did you talk to/contact? What was the contact about?

12. **Contact Status:** Complete

13. Click **Save**

The screenshot shows the 'Contact Log Detail' form with the following fields and callouts:

- 8:** Contact Type (Sending)
- 9:** Contact Subtype (Phone Call - Outbound)
- 10:** Subject (Called student to talk about program options)
- 11:** Contact Detail (Called and was able to speak to test and her mother about program choices. Seems to be interested in the Denmark year program. Talked about getting the online app done. Let her know how to contact me if questions arise.)
- 12:** Contact Status (Completed)
- 13:** Save button

Your Contact Log can be found back under the "Contact Log" tab. It cannot be erased.

The screenshot shows the 'Contact Log' tab with the following details:

- Navigation tabs: Personal, Family, Service Case (1/6), Activities (0), **Contact Log (15)**, Affiliation (0), Login Account, Person Award
- Buttons: Create Contact Log, Compose E-mail
- Filters: Contact Type: All, Contact Subtype: All, Means of Contact: All
- Table:

No.	Contact Name	Contact Type	Contact Subtype	Means of Contact	Subject	Contact Status	Contact Date	Followup Date
1	Mentzel, Emily	Sending	Phone Call - Outbound	Contact Log	Called student to talk about program options	Completed	7/5/2011	