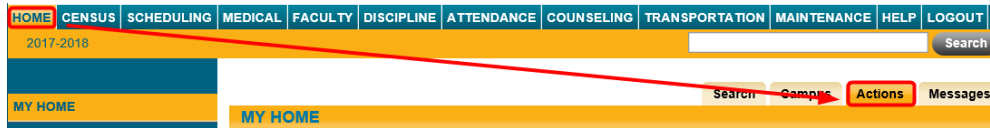


Summary – The Actions tab in SchoolTool allows faculty to communicate with students and parents in two ways:

- **Email** messages can be generated that are sent to the contacts of each student
- **Mailings** can be generated with student-specific information (merge fields)

1. Click on the **Actions** tab on the right side of your **My Home** sub-module to begin.



2. Select an Action to **Send Email** or **Create Document**

3. **Searching for Students**

Note: There are two search options on this screen, By Class using the class roster or Advanced Search. Not all users will have access to both methods. If both methods are available, you may use the radio buttons to select either one method or the other to search for students.

A. **By Class:**

- If you are a teacher and have classes, a list of courses will appear on the screen. Select the class(es) you wish to include using the checkboxes for each class.

Search for Students:

By Class
 Advanced Search

<input checked="" type="checkbox"/>	Class	Period	Section	Days	Room	Semester
<input checked="" type="checkbox"/>	Homeroom		0		190	
<input checked="" type="checkbox"/>	Study Hall 8		8	1,2,3,4,5,6	190	Q1/Q2/Q3/Q4
<input checked="" type="checkbox"/>	English 8	1	1	1,2,3,4,5,6	190	Q1/Q2/Q3/Q4
<input checked="" type="checkbox"/>	English 8	5	4	1,2,3,4,5,6	190	Q1/Q2/Q3/Q4

B. **Advanced Search:**

- If you have the appropriate rights, you may also be able to select the **Advanced Search** option to locate students.
- Select the appropriate **criteria** to locate the desired students.

Search for Students:

By Class
 Advanced Search

Random
 Use "AND" for like terms

4. Click **Search**. The results of the search will appear on the bottom of the screen.

5. Select individual students using the checkboxes to choose the students for this mailing.

6. Click **Continue**.

Depending on the option selected at the beginning of this process, you will be presented with one of two screens: the **Send Email** screen or the **Create Document** screen.

Send Email

Once you have selected "Send Email" as your initial option and have performed the appropriate search steps, you will be presented with the standard SchoolTool email screen (along with additional contact options):

To send an email message, simply fill in the form, starting at the top:

- a. **From** – Your name and email address will default to appear in this field (if available). This field is pre-filled and cannot be modified.
Note: If you see a message in red "You do not have an email address and will be unable to send this email", you will need to have your email address added to your account in SchoolTool before you can send any emails.
- b. **To** – This field will be pre-filled with your name and email address (if available). You may enter additional email addresses here, separated by commas or semicolons. In addition to the recipients you select at the bottom of the screen, each email address in the **To** field will receive this email.
- c. **BCC** – You may send blind carbon copies using this field. All valid email addresses in this list will receive a Blind Carbon Copy of the message. Multiple email addresses may be entered here, separated by commas or semicolons.
- d. **Subject** – This is the subject of the email message.
- e. **Body** – The body of the email. Formatting is minimal to preserve compatibility with many email systems.
- f. **Importance** – Normal importance is set for default; this can be changed to High or Low.
- g. **Attachment** – To attach a file, click the **Browse** button, locate the file, and click **OK**. Click the **Upload** button to load the file into the SchoolTool email message. The name of the attachment will display at the bottom of the screen once it has been successfully uploaded. Repeat these steps for each file to be attached. The selected attachment(s) will be sent to all recipients when Send Email is clicked.

Note: Each attached file must be 10MB or smaller in size. If a user attempts to upload a file larger than 10MB, an error message will display and the attachment will be discarded.

The screenshot shows the email form interface. At the top right, there is a yellow button labeled "MY HOME". Below it, the text "Select an Action:" is followed by two radio button options: "Send Email" (which is selected and highlighted with a red box) and "Create Document". Below the action selection, there is a section for "IMPORTANCE:" with a dropdown menu set to "Normal". A warning message states "Attachments must be smaller than 10 MB." Below this, there are two buttons: "Browse..." and "Upload Attachment". A red 'X' icon is next to a yellow highlighted error message: "Using the Action tab Email.docx". At the bottom, there is a "SEND TO:" section with four checked checkboxes: "Student", "Primary", "Receives Mail", and "Parent Portal Access". To the right of these checkboxes is a "Send Email" button.

2. Select the recipients


Use the checkboxes to specify contacts as recipients based on relationship flags defined in Census. To add additional contacts to the recipients list, simply check the appropriate checkbox option. These options are mutually exclusive; each option **adds** contacts to this list, regardless of whether or not a contact meets multiple checkbox criteria.

- a. The following options are available for adding contacts (will be sent as BCC):
 - **Student:** Includes all students in the selected group
 - **Primary:** Includes all adult contacts listed as Primary Contact 🏠 for each student.
 - **Receives Mail:** Includes all adult contacts that have the Receives Mail flag 📧 checked in Census for each student.
 - **Parent Portal Access:** Includes all adult contacts that have the Parent Portal Access 🖥️ flag checked in Census for each student.

Note: Any individual who does not have an email address listed in their Personal Record will not receive an email, regardless of whether or not they appear in this list.

As checkboxes are selected, a student's contacts will be added to the list below, with a separate row for each contact. This means a student may appear in the list more than once, although if "Student" is checked, a student will only receive a single copy of the email regardless of how many times the student appears in the list.

- Click on the **Send Email** button. The email message will be delivered to all designated recipients and you will see a message **"Email successfully sent"**.

ABC 

IMPORTANCE: Normal



Attachments must be smaller than 10 MB.

SEND TO: Student Primary Receives Mail Parent Portal Access


Email successfully sent

Student	Student Email
Jetson, Judy	[REDACTED]
Jetson, Elroy	[REDACTED]

- There are two icons that look like the Back icon on this screen. The upper icon is the **Back** icon, while the lower icon is the **Done** icon.

- The **Back** icon will *return the user to the previous search* results screen, allowing them to reselect the specific students desired to receive this email message.
- The **Done** icon (beneath the Back icon) will *return the user to their My Home screen*, without sending the email message.
- The **Cancel**  icon will cancel this operation, not send the email, and will return the user to the first screen of the Actions tab.
- The **Spell Check**  icon will spell check the document before it is sent out.



Important: Does not receive mail! message— This means the contact does not have the **Receives Mail**  flag set on the student's contact tab for this person. The contact must also have an email address in their person record or an email will NOT be sent.

SEND TO: Student Primary Receives Mail Parent Portal Access

Student	Student Email	Contact	Contact Email
Jetson, Judy	[REDACTED]	Jetson, Jane	judjet@abc.123
Jetson, Judy	[REDACTED]	Jetson, George	Does not receive mail!
Jetson, Elroy	[REDACTED]	Jetson, Jane	judjet@abc.123
Jetson, Elroy	[REDACTED]	Jetson, George	Does not receive mail!