#### **Identifying schools with “in progress” surveys**

* Refer to your community’s survey completion tracker app to identify the schools that have started but have not yet completed a survey. These schools are listed as “In Progress” in the Status column.
* From the survey completion tracker app, you can download a list of “in progress” schools into an excel file.
  + You can use this excel file to contact the principals at these schools via mail merge, email campaigns, or individual outreach.
* See [this video](https://drive.google.com/file/d/1h6qrR6xI72_Xl1LW5_c4o0mxrwAcwd4O/view?usp=sharing) for a click through of these steps.

#### **Viewing school surveys as an admin**

* Your artlook admin portal includes an “Impersonate User” feature, which allows you to login to a user’s account as an admin and view their survey responses. This is a helpful way to check each “in progress” school for their level of survey completeness.
* To do this, navigate to your admin portal and sign in using your admin credentials.
* Next, click on “Schools” in the left-hand navigation menu and search for one of the “in progress” schools using the search bar at the top of the page. Click on the school you are interested in.
* Scroll down to the “Employees” section. You will see the email addresses for the arts liaisons, principals, and other school employees at the school. Click on the words “Sign In As” to view a user’s profile as an admin.
* Using this “Impersonate User” functionality, you can click through the user’s school survey and even edit their information.
* See [this video](https://drive.google.com/file/d/1h6qrR6xI72_Xl1LW5_c4o0mxrwAcwd4O/view?usp=sharing) for a click through of these steps.

#### **Updating school contacts (e.g., a principal that moved from one school to another)**

* You will need to (1) deactivate the principal at their previous school, (2) deactivate the old principal at the new school, and (3) add the principal to their new school. Here are the specific steps you can take to do that in the admin portal:
  + Navigate to your admin sign-in page and sign in using your admin credentials.
  + First, deactivate the principal at their previous school
    - Click on “Schools” in the left-hand navigation and search for the school that the principal previously worked at. Click on the appropriate school.
    - Scroll down to the “Employees” section. You will see the email address of the principal who has now left this school. Click on “Edit”.
    - In the “Edit Employee” form, uncheck the “Active” box and click “Update Employee”. This principal is now inactive at that school for 2018-19.
  + Next, deactivate the old principal at the new school
    - Repeat the steps above, but this time, deactivate the old principal at the new school
  + Add the principal to their new school
    - Click on “Employees in the left-hand navigation menu.
    - Click “New Employee” in the top right-hand corner of the page.
    - Complete the New Employee form to create a new employee record (this attaches the principal to a new school).
      * Select “principal” in the Position dropdown
      * Select the principal’s email address in the User dropdown
      * Select “2018-19” in the School Year dropdown
      * Select the principal’s new school in the “Employable” dropdown
      * Disregard Schedule and Billable
      * Make sure the Active checkbox is checked
      * Click “Create Employee”
  + Finally, reach out to the principal to let them know that they can login to complete the survey for their new school
    - If the principal has already established their artlook password, then they can continue using that same password. The only difference when logging in will be that they will select their new school in the School Name dropdown on the sign-in page.
    - If the principal has not established their artlook password, then they will need to use the “Forgot Password” functionality on the school portal sign-in page to create their password.