

This document is intended to assist External Teachers with using the mandatory and optional bulk emails in ADLC's Student Information System (SIS).

The instructions included in this document are:

- using the Students tab to send Mandatory Bulk Emails
- using the Students tab to send Optional Bulk Emails
- creating Personalized Bulk Email Templates from the Students tab

To be compliant with Canada's Anti-Spam Legislation (CASL), we must provide our students the ability to opt out of our bulk emails. However, we are required to ensure students are receiving course-specific information (from which they cannot opt out) including all the automatic notification emails sent to students from the SIS.

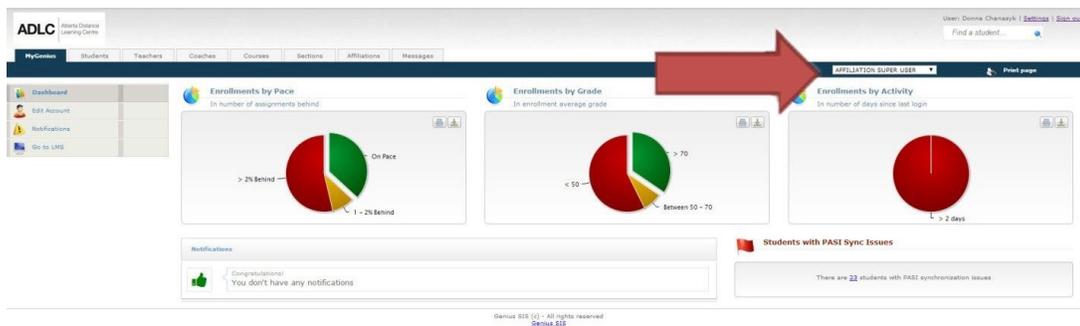
Therefore, the SIS now contains two categories of bulk emails for students:

- **Mandatory Bulk Emails** - these are education-related, course-specific information that all students should receive. Students **cannot** opt out of these emails. These require the use of one of the available templates or one of the personalized templates that teachers can now utilize.
- **Optional Bulk Emails** - these contain optional information from which students **can** opt out. These are emails created by either using a template or entering text directly into the blank **Compose Email** area. Examples of these emails include holiday closure, changing office hours, community events, and club events.

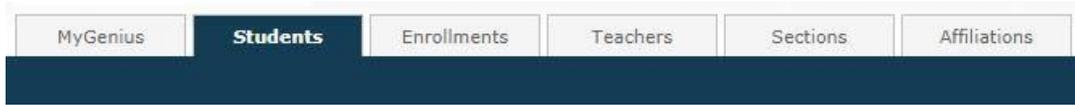
Teachers can access the **Mandatory** and **Optional Bulk Emails** through the **Students** tab and through the **Enrollments** tab.

### Using the Students Tab to Send Bulk Emails

1. When you are logged into the SIS, make sure your **External Teacher** role is selected before you begin. This can be found in the drop-down menu on the dark blue bar that runs along the screen.



2. Click the **Students** tab.



3. From the menu on the left-hand side, click either **Mandatory** or **Optional Bulk Emails**.



4. Select your search criteria.

**Note:** To set the minimum criteria, select your school name from the **Affiliation** drop-down menu.

A search criteria form on a light yellow background. It contains two columns of dropdown menus. The left column includes: Affiliation, Special Ed, LEP/ELL, Free/Reduced Lunch, Currently Enrolled, Ever Enrolled, Students with PAST Sync Issues, and Clone Year. The right column includes: Grade Level, Gender, State, Postal Code/Address, Term, Course, Section, and Students with Data Discrepancies. A 'Get Data' button is located at the bottom right of the form.

5. Click **Get Data**.

6. Check the boxes in the **Select** column for all students you would like to email.

There are 62 students matching your criteria:

Check All

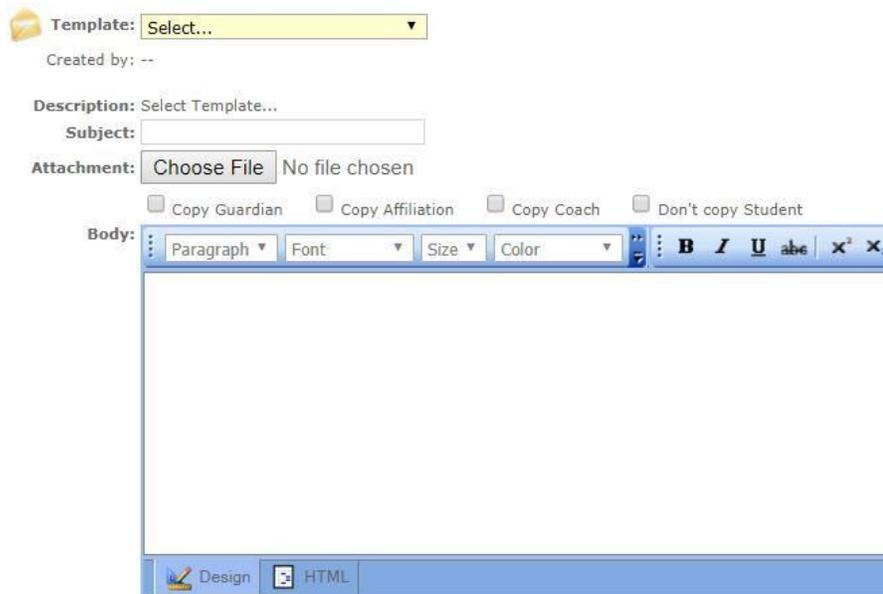
Search:

Select	Flags	ID
<input type="checkbox"/>	IB+	179050
<input type="checkbox"/>	IB+	243459
<input type="checkbox"/>	IB+	184597
<input type="checkbox"/>		222281
<input type="checkbox"/>	IB+	193261
<input type="checkbox"/>	IB+	182446
<input type="checkbox"/>	IB+	104243
<input type="checkbox"/>		242369
<input type="checkbox"/>		207260

7. Scroll to the bottom of the page and click **Bulk Email**.

- From the **Template** drop-down menu, select the template for the email you would like to send or compose your own letter.

**Note:** If you are unfamiliar with the templates, you can select a template and then preview the text before you send the email.



- After you have chosen the appropriate template, you can select to whom you would like to **Copy** the email.



- At the top of the screen, click **Send**.



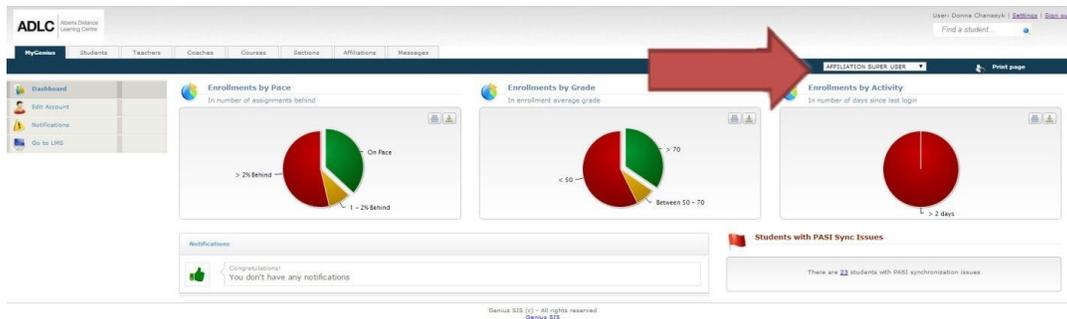
**Note:** All emails sent from within the SIS are posted automatically in the **View Communications** link of each student's file.

### **Creating Personalized Bulk Email Templates from the Students Tab**

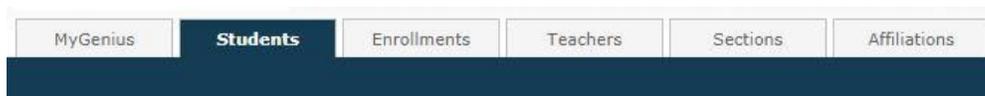
When sending **Mandatory Bulk Emails**, you may choose one of the existing templates from the drop-down list of templates located in the **Compose** area of a bulk email or you may select a template that you have created and saved in the SIS. (Realize that you cannot edit in the **Compose** area; edits can be made only directly in the template creation area).

For **Optional Bulk Emails**, you may choose one of the existing templates or one of your own personalized templates (which you can edit in the **Compose** area), or you may type your desired text directly into the **Compose** area.

1. When you are logged into the SIS, make sure your **External Teacher** role is selected before you begin. This can be found in the drop-down menu on the dark blue bar that runs along the screen.



2. Click the **Students** tab.



3. From the menu on the left-hand side, click **Email Templates**.

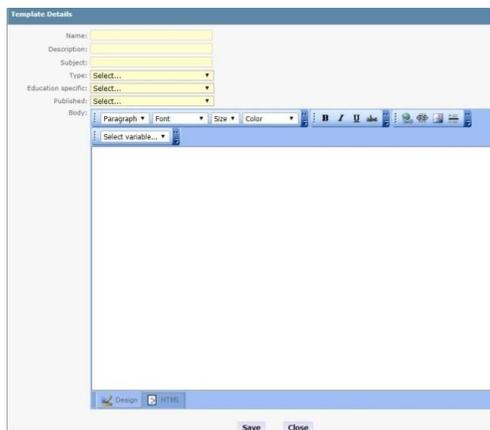


4. To create a new template, click the **Add Template** link.



5. To name your template, enter the respective text into the **Name** field.

**Note:** The **Name** is whatever is displayed in the drop-down template menu in the **Compose** area of the **Mandatory** and **Bulk Email** links. Please ensure that this name is sufficiently descriptive for ease of use.



6. In the **Description** field, enter the purpose of your template.
7. In the **Subject** field, enter the subject to be displayed for your Bulk Email.
8. In the **Type** field, select **Students** from the drop down menu. (This determines in which tab you choose to use this template).
9. In the **Education Specific** field, select **Yes** or **No** appropriately.

**Note:** When you create an Optional Bulk Email template (i.e. **Education Specific=No**), the opt out text (i.e. *'You're receiving this email because you're taking a course through ADLC. Unsubscribe from these emails.'*) is included automatically in the body area of your message. You are required to leave the opt out message in the template to be CASL compliant.

10. In the **Published** field, select either **Yes** or **No** appropriately.
  - Selecting **Yes** allows other teachers to view and use your template, but only you, Tech Admin, or Communications can edit your created template.
  - Selecting **No** ensures that only you are able to view and use your template from the drop-down menu.

**Note:** If another teacher chooses to use one of your templates while composing an **Optional Bulk Email**, he or she will be able to edit the template contents; however, this will affect only the bulk email that teacher intends to send. Such edits do not change the original template. When composing a **Mandatory Bulk Email** that requires the use of a template, you cannot make edits in the **Compose** area.

11. The **Select Variable** function (i.e. inclusion of a student's name, course name, end date, current assignments, assignments left, etc. into the **Body** of your message) allows you to send bulk emails that are personalized automatically for each student.

**Note:** The **[SIGNATURE]** variable (located under **User Info**) will work if you have entered your signature information in the **Edit Account** link located on the left-hand side column of your Dashboard in the SIS.

12. Compose your template with the desired text in the body of the email.

13. Click **Save**.

**Note:** In the **Email Templates** link, you are able to view, edit, and delete any template you have created by clicking on the **Edit** icon (pencil/paper image) located in the **View** column next to the respective template.

The screenshot shows the MyGenius interface with the 'Enrollments' tab selected. The left sidebar has 'Email Templates' circled in red. The main content area has a search criteria section with a 'Get Data' button. Below that, it says 'There is 1 templates matching your criteria:' and shows a table with one row. The 'View' column of the table has a red circle around the edit icon.

View	ID	Name	Description	Subject	Body	Type	Created by	Last Used On
	120	Course Status Progress Update...	Example Monthly Course Progress Update Template	Course Progress Update...	<table class="MsoNormalTable" style="font-family: "Times New Roman" font-size: 10pt; border-collapse: collapse; width: 100%;><tr><td style="width: 50%;></td><td style="width: 50%;></td></tr></table>	ENROLLMENTS	Crystal Waldowski-Puskappelles	

## Questions?

Give us a call at 1-866-774-5333 or email [info@adlc.ca](mailto:info@adlc.ca)