

OPUS

S I E D A T A C L O U D

Tutor Matching

Opus has a full suite of tools to help you find the right tutor for each student.



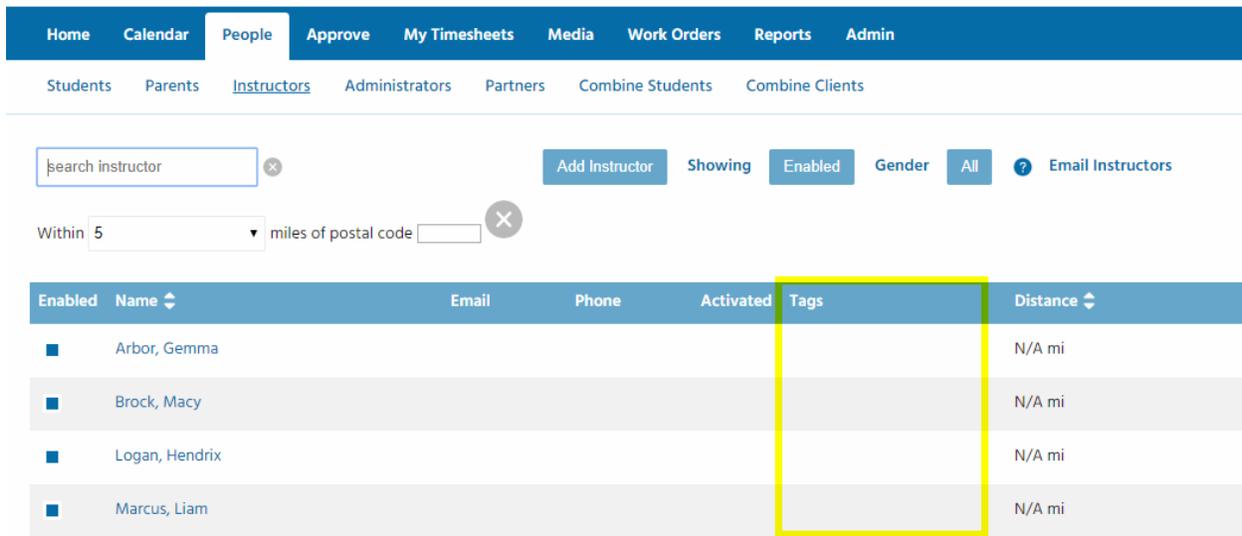
[Click here to view a training video on Opus Tutor Matching.](#)

Training Assignment: Sending a tutor match email for a new student.

In this training, you will search through your list of tutors to find one who is physically proximate to the student and qualified to teach the appropriate subject.

Step 1a. Make sure your tutors have proper Tags.

Log into Opus (www.opus.schooliseasy.com/login) and go to People → Instructors. You should see a list of your instructors. Look at the Tags column to see if your instructors have been tagged with the subjects they are qualified to teach.



The screenshot shows the Opus interface for managing instructors. At the top, there is a navigation bar with tabs: Home, Calendar, People, Approve, My Timesheets, Media, Work Orders, Reports, and Admin. Below this, there are sub-tabs: Students, Parents, Instructors, Administrators, Partners, Combine Students, and Combine Clients. A search bar labeled "Search instructor" is present, along with an "Add Instructor" button and filters for "Showing Enabled", "Gender All", and "Email Instructors". A distance filter is set to "Within 5 miles of postal code". The main content is a table with the following columns: Enabled, Name, Email, Phone, Activated, Tags, and Distance. The Tags column is highlighted with a yellow box. The table lists four instructors: Arbor, Gemma; Brock, Macy; Logan, Hendrix; and Marcus, Liam, all with a distance of "N/A mi".

Enabled	Name	Email	Phone	Activated	Tags	Distance
■	Arbor, Gemma					N/A mi
■	Brock, Macy					N/A mi
■	Logan, Hendrix					N/A mi
■	Marcus, Liam					N/A mi

If they are not tagged yet, follow the procedure below for at least a couple instructors so you can follow along in the training.

Go to the instructor's account page and click on the Tags sub-tab below their contact information. Search for the appropriate tag in the right-hand column and click on the tag to add it to the instructor's list on the left-hand column.

Calendar Relationships Sessions Tasks Comm Logs Tags Timesheets Timesheet

Tags ?

search

Elementary Level Math

Math

Science

Available Tags ?

search

Advanced Trig

Elementary Level Math

English

ESL

Honors Algebra II

Math

Science

Writing

In this example, we are indicating that Liam Marcus is qualified to teach Math, Science, and Elementary Level Math.

Step 1b. Make sure your tutors have home addresses.

Go to People → Instructors and click on your instructors' names to go to their account pages. Check the Address field to see if they have at least a postal code in their home address.

Marcus, Liam [Edit](#)

Email:

Primary Phone:

Secondary Phone:

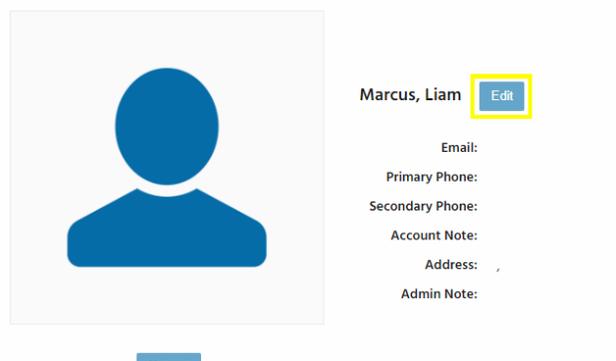
Account Note:

Address: ,

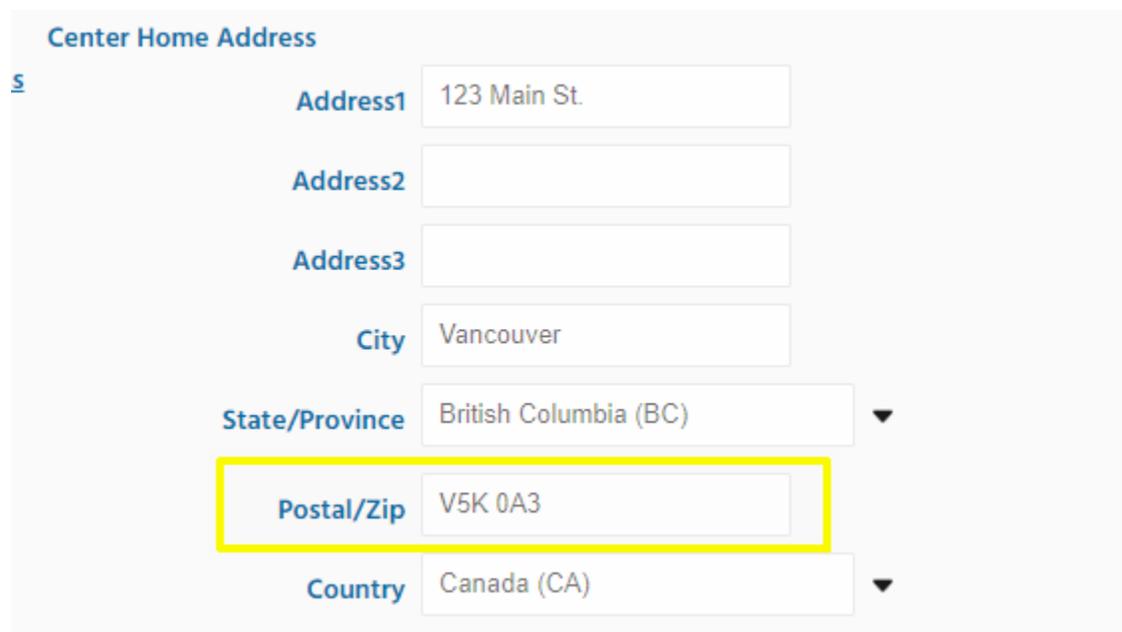
Admin Note:

If they do not have an address yet, follow the procedure below for at least a couple instructors so you can follow along in the training.

From the instructor's account page, click the Edit button.



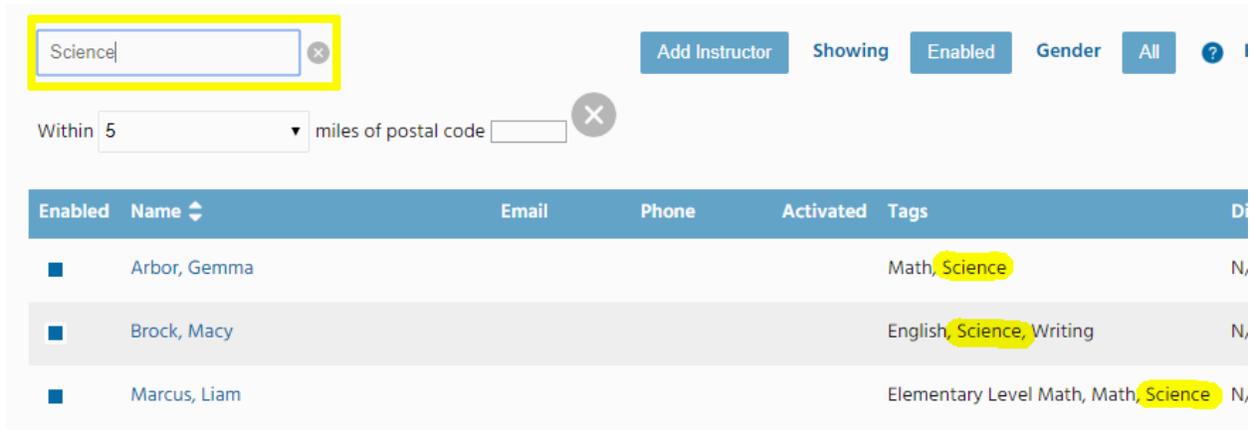
In the Edit Instructor form, fill in an address in the Center Home Address field. The address can be fake, but make sure the postal code is real and nearby.

A screenshot of the "Center Home Address" form. The form contains several input fields: "Address1" (123 Main St.), "Address2", "Address3", "City" (Vancouver), "State/Province" (British Columbia (BC)), "Postal/Zip" (V5K 0A3), and "Country" (Canada (CA)). The "Postal/Zip" field is highlighted with a yellow border. There are small blue "s" icons next to the "Address1" and "Country" labels.

In this example, we are adding Liam Marcus's address somewhere in Vancouver.

Step 2. Search by subject.

Go to People → Instructors and type the appropriate subject into the search bar. The list will filter down to only those instructors who have been tagged with that subject.



The screenshot shows a search interface for instructors. At the top, there is a search bar containing the text "Science", which is highlighted with a yellow box. To the right of the search bar are several buttons: "Add Instructor", "Showing", "Enabled", "Gender", and "All". Below the search bar, there is a dropdown menu set to "5" and a text input field for "miles of postal code". Below this is a table with the following columns: "Enabled", "Name", "Email", "Phone", "Activated", "Tags", and "D". The table contains three rows of instructor data, with the "Science" tag highlighted in yellow in each row.

Enabled	Name	Email	Phone	Activated	Tags	D
■	Arbor, Gemma				Math, Science	N,
■	Brock, Macy				English, Science, Writing	N,
■	Marcus, Liam				Elementary Level Math, Math, Science	N,

In this example, we have searched for Science, narrowing our list down to only 3 instructors.

Step 3. Search by postal code.

Type or copy/paste the postal code of the student into the Postal Code field. Adjust the search radius to something you find reasonable. The list will filter down to only those instructors within the indicated radius of that postal code.

We recommend overestimating the radius: the geolocation calculation is approximate, and you don't want to exclude qualified instructors who are just outside of the search radius. However, don't set it too large: you risk inuring your instructors to new student messages, leading to poor response rates.

Science

Add Instructor Showing Enabled Gender All ? Email Instructors

Within 15 miles of postal code V5K 1B1

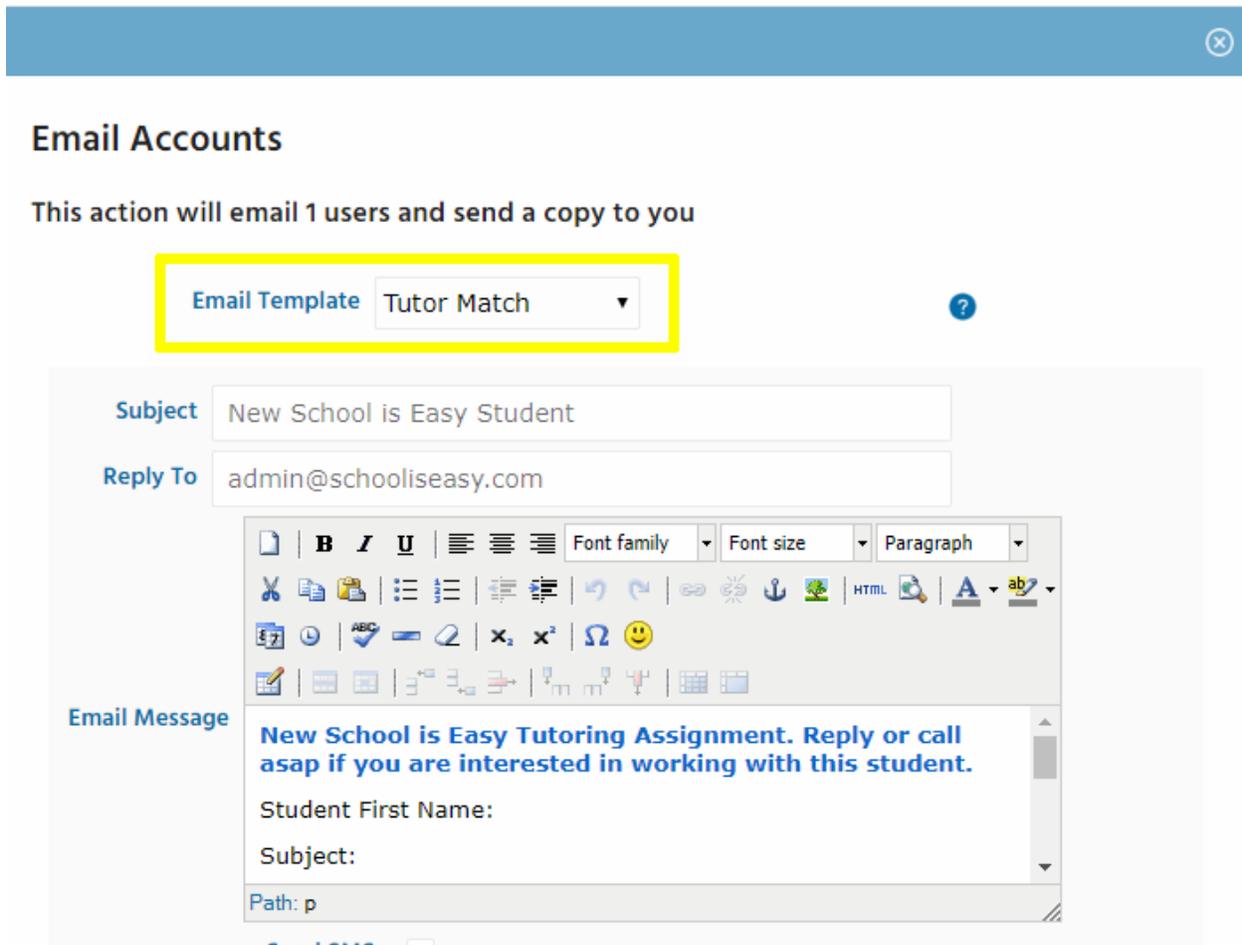
Enabled	Name	Email	Phone	Activated	Tags	Distance
<input checked="" type="checkbox"/>	Marcus, Liam				Elementary Level Math, Math, Science	1.63

1 - 1 of 1 1 Rows: 5

In this example, we are entering the postal code of our new student Chloe Ellsworth. We believe that a 15-mile commute is about the limit that we would like to search.

Step 4. Send tutor match email.

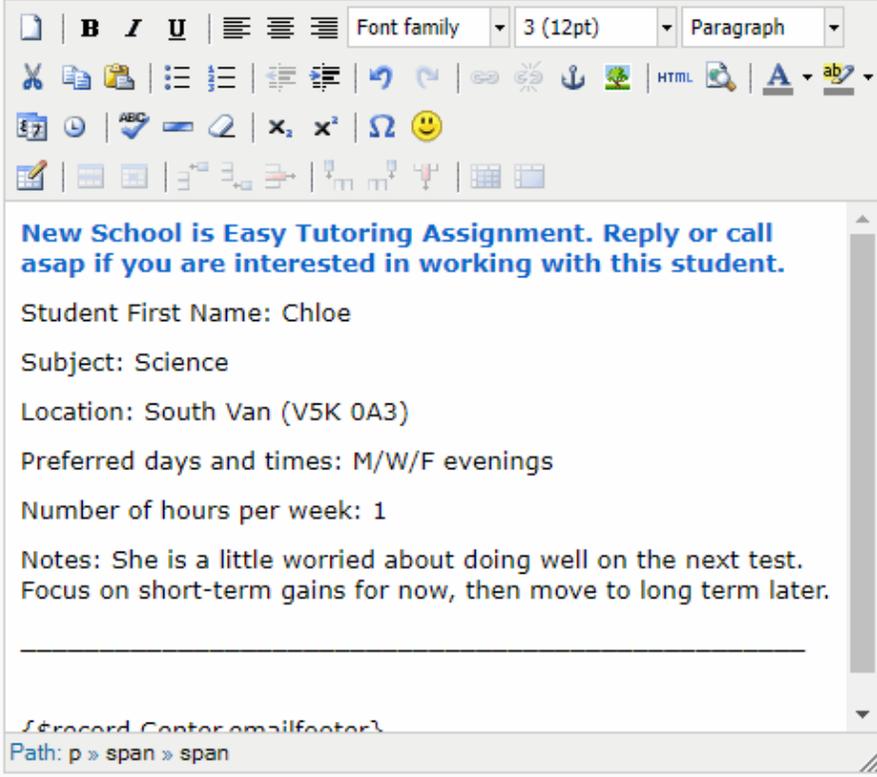
Once you have filtered your list down to the qualified candidates living close to your student, you'll want to email them to let them know about the opportunity. In People → Instructors, click the Email Instructors link, then select the Tutor Match template from the Email Template list.



The screenshot shows the 'Email Accounts' interface. At the top, there is a blue header bar with a close button (X). Below the header, the title 'Email Accounts' is displayed. A message states: 'This action will email 1 users and send a copy to you'. Below this, there is a yellow-bordered box containing the 'Email Template' dropdown menu, which is currently set to 'Tutor Match'. To the right of the dropdown is a blue question mark icon. Below the dropdown, the 'Subject' field is filled with 'New School is Easy Student'. The 'Reply To' field is filled with 'admin@schooliseasy.com'. The 'Email Message' section contains a rich text editor with a toolbar and a text area. The text area contains the following content: 'New School is Easy Tutoring Assignment. Reply or call asap if you are interested in working with this student.' Below this, there are prompts for 'Student First Name:', 'Subject:', and 'Path: p'. At the bottom of the form, there is a 'Send SMS' checkbox.

Fill in the appropriate information about the new student in the prompted spaces in the Email Message section. If you would like to send an accompanying SMS (text) message, enter the text you would like to send as well. Then click the Send button to send an email (and optionally text message) to all of the listed recipients. You will also receive a copy of the email.

Email Message



The screenshot shows an email composition interface. At the top is a rich text editor toolbar with options for bold, italic, underline, font family, font size (3 (12pt)), and paragraph style. Below the toolbar, the email body contains the following text:

New School is Easy Tutoring Assignment. Reply or call asap if you are interested in working with this student.

Student First Name: Chloe
Subject: Science
Location: South Van (V5K 0A3)
Preferred days and times: M/W/F evenings
Number of hours per week: 1
Notes: She is a little worried about doing well on the next test. Focus on short-term gains for now, then move to long term later.

Path: p » span » span

Send SMSs ■

SMS Message

Hello! Check you email for a new student opportunity.

In this example, we have inputted the information for Chloe Ellsworth and included a short text message for any instructors who might check their phones more often than their email.

That provides a quick demo of the basics of tutor matching in Opus using Tags and the Postal Proximity Search. A lot of the effort here is upfront: making sure your instructors are properly set up with tags and addresses when they sign on with you. Once that is done, though, the matching process couldn't be faster.