
**Working with Student Contacts
PowerSchool Student Information System**

JENN ROACH

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 - Which Type of Contacts can be tracked?
 - Legacy Compatibility
- ▶ **Interface**
 - What does the interface look like?
 - What Contact data is stored?
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 - Viewing/Editing Records - Student View
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 - Modifying Code Set data
 - Manual Consolidation
 - Considerations
 - Maintaining Legacy fields?
 - Overlapping Original Contact types
 - Multiple Parent Access accounts
 - How to clear conflict Issues

- ▶ **Data Clean up Options (con't)**
 - Delete Existing records/import New records
 - Considerations
 - How does this affect Legacy fields?
 - How does this affect Custom fields?
 - Parent Access Accounts?
 - Export/Update/Import updated records
 - Considerations
 - How does this affect Legacy fields?
 - How does this affect Custom fields?
 - Parent Access Accounts?
 - Configuring the file



STUDENT CONTACTS OVERVIEW/MIGRATION

WHAT ARE - STUDENT CONTACTS?

- ▶ Student Contacts is PowerSchool's system for tracking Student Contact information.
- ▶ This system allows a single contact to be linked to multiple students (regardless of school or relationship) which in turn simplifies the process of managing the contact's data.
- ▶ Student Contacts ties everything together in a single system while allowing for backward compatibility with PowerSchool's legacy contact data. (Mother, Father, Guardian and/or Emergency Contacts)

WHAT TYPE OF CONTACTS CAN BE TRACKED?

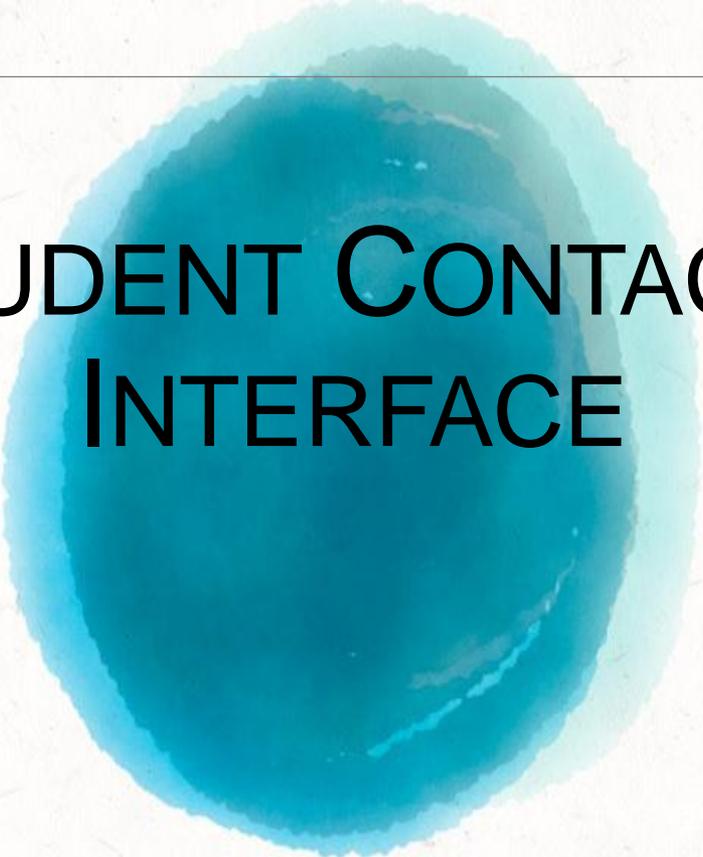
- ▶ Student Contacts includes 11 initial relationship types.
- ▶ Additional types may exist based on existing Emergency Contact Rel. Types
- ▶ Additional types can be added at the district's discretion.
- ▶ Relationship types are not limited to a single contact. (i.e., Students can have more than one Mother, Father, Stepmother, Stepfather, etc.)
- ▶ **Relationship Types are different from Original Contact Types.*

- **Initial Relationship Types include:**

Mother	Father
Sister	Brother
Aunt	Uncle
Grandmother	Grandfather
Friend	Neighbor
Other	

CONTACT DATA CAN INCLUDE:

- ▶ Student Contacts allows for multiple entries for each contact value.
 - **Phone Numbers**
 - Phone Types include Daytime, Home, Work and Mobile.
 - Numbers can be prioritized and/or set as Preferred for use in an Emergency situation.
 - **Email Addresses**
 - Email Types include Current or Additional
 - Email address can be set as Primary.
 - **Street Addresses**
 - Address Types include Home or Mailing.
 - Addresses allow for a Start/End date so address history can be retained.
- ▶ Contact's student association can be flagged as:
 - Has custody
 - Lives With
 - School Pickup
 - Emergency Contact
 - Receives Mail
- ▶ Contact records have a Starting/Ending date.
- ▶ Email Preferences for Parent Access Accounts are linked through the Parent Contact Screen.



STUDENT CONTACTS INTERFACE

CONTACTS TAB

Start Page

Students Staff **Contacts**

First Name

Last Name

Street Address

Unit

Phone Number

Extension

Email Address

Include Inactive

Only Show Access Accounts

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Search

New Search Fields

*Use to only search for Parent Access Accounts (Works like old "Parents" tab)

Use to include inactive Contacts in returned list!

CONTACTS TAB – SEARCH RESULTS

Search results (499)

Contact	Access Account	Street Address	Phone Number	Email Address	Associated Student(s)
Abplanalp, Macy	✓		1-555-555-6890 281-653-6890	changeit@email.com	Kerbs, Adam Kerbs, Adam Kerbs, Michael Kerbs, Michael Kerbs, Michael
Adair, Adam	✓		203-222-1234 555-555-5555 555-555-1014 979-555-1014	adair@noemail.com test@test678.com	Adair, Brandon Adair, Brandon
Adair, Adam			979-555-1014		Adair, Brandon Adair, Justin
Adair, Ash	✓	12345 Home Drive2	208-888-6666	ash@email.com	Adair, Brandon Adams, Corby
Adair, Brenda					Adair, Brandon
Adair, Jane		12345 Home Drive	555-555-5555 111-111-1111	jadair@noemail.com	Adair, Brandon
Adair, Willima			916-555-8124 281-653-3605		Adair, Brandon Adair, Brandon
Adair, Willima			916-555-8124 281-653-3605		Adair, Justin
Adair, Wilma	✓		(916) 288-1608 1-555-555-8124 123-123-2344	Testeamil8877@email.com	Adair, Brandon Babb, Judy H
Adams, Barbara			1-555-555-3273		Adams, Julie

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Select By Hand

CONTACT VIEW - DEMOGRAPHICS AND WEB ACCESS

Father (last, first)	<input type="text"/>
Father's Day Phone	<input type="text"/>
Father's Employer	<input type="text"/>
Father's Home Phone	<input type="text"/>
Preferred Gender	Female (F) ▾
Legal Gender	Female ▾ <input checked="" type="checkbox"/> Copy
Grade Level	2
Graduation Year	<input type="text" value="2033"/>
Guardianship	<input type="text"/>
Guardian Email	<input type="text"/>
Mother (last, first)	<input type="text"/>
Mother's Day Phone	<input type="text"/>
Mother's Employer	<input type="text"/>
Mother's Home Phone	<input type="text"/>

▾ Web Account Access

Account Locked/Disabled	<input type="checkbox"/>
Username	<input type="text" value="Ash"/>
New Password	<input type="text"/>
Confirm Password	<input type="text"/>
Recovery Email	<input type="text" value="ash@email.com"/> <input type="button" value="Select existing email"/> ▾

CONTACT VIEW – STUDENTS 1

▼ Students Show All (+0) **Add Students**

School	Name	Relationship	Custody	Lives With	School Pickup	Emerg. Contact	Original Contact Type	Start Date	End Date	Data Access	Action
AGHS1	Adair, Brandon	Neighbor									 
AGHS1	Adams, Corby	Uncle									 

Add Students ✕

 [View Field List](#) * [?]

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

*** Search Results (1)**

Student	Student Number	Grade Level	Date of Birth	Relationship to Student	Data Access
<input type="checkbox"/> Adair, Brandon	3	12	2001-12-12	<input type="text"/>	<input type="checkbox"/>

Cancel **Ok**

* [?]

CONTACT VIEW – STUDENTS 2

Students

Show All (+0) Add Students

S	Details: Adair, Brandon 3	School Pickup	Emerg. Contact	Original Contact Type	Start Date	End Date	Data Access	Action
A	Active All Data Access							
A								

Relationship: Neighbor

Start Date: MM/DD/YYYY

End Date: MM/DD/YYYY

Has Custody

Lives With

School Pickup

Emergency Contact

Receives Mail

Exclude From State Reporting

Notes

Approximately 4000 characters left

Original Contact Type

Details: Adair, Brandon 3

Active All Data Access

Lists historical Contact info

Can Access Student Data And Email

What information would you like to receive?

- Summary of Current Grades and Attendance
- Detail Report Showing Assignment Scores for Each Class
- Detail Report of Attendance
- School Announcements
- Balance Alert

Frequency of Emails: Never

Send Now

Web Account Access Must be setup for this section to be enabled.

Cancel Ok

CONTACT VIEW – PHONE NUMBERS

Phone Numbers

Prioritize order of phone numbers

Set preferred #

Order	Type	Phone Number	Preferred	SMS	Action
 	Mobile	208-888-6666	<input checked="" type="checkbox"/>	<input type="checkbox"/>	 
 	Home	555-234-3456	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 

Add Phone

Type:

Phone Number: *

Extension:

SMS: (Accepts text messaging)

Preferred:

Edit Phone

Type:

Phone Number: *

Extension:

SMS: (Accepts text messaging)

Preferred:



CONTACT VIEW – EMAIL ADDRESSES

▼ Email Addresses

Add Email

Primary	Type	Email Address	Action
✓	Current	ash@email.com	 
	Additional	HappyDay@gmail.com	 

Add Email Address

Type

Email Address *

Primary

Additional Current

Cancel Ok

CONTACT VIEW – ADDRESSES

Addresses

Show All (+1) [Add Address](#)

Order	Type	Address Line 1 Address Line 2	Unit	City	State/Province	Postal Code	Country	Start Date	End Date	Action
	Home	12345 Home Drive2		Jackson	Mississippi (MS)	98457	United States (US)	2/12/2018		
	Home	137 East Elm ST		Jackson	Mississippi (MS)	39209	United States (US)	1/1/2010	2/11/2018	

[Delete](#) [Submit](#)

Add Address

Type

Address Line 1

Address Line 2

Unit

City

Country

State/Province

Postal Code

Start Date

End Date

[Cancel](#) [Ok](#)

STUDENT VIEW – CONTACTS

Father (last, first)

Father's Day Phone

Father's Employer

Father's Home Phone

Gender

Grade Level

Graduation Year

Guardianship

Guardian Email

Mother (last, first)

Mother's Day Phone

Mother's Employer

Mother's Home Phone

Parent Information

Mother's Name

Daytime Phone

Father's Name

Daytime Phone

Contacts

Kerbs, Michael 10 1040 AGHS1

Show All (+0) **Add**

Order	Name / Email	Relationship	Phone Type	Phone	Address	Custody	Lives With	School Pickup	Emerg. Contact	Original Contact Type	Start Date	End Date	Data Access	Actions
	Lindsay Kerbs	Mother	Home	1-555-555-8633						Mother				
	Dustin Kerbs	Father	Home	1-555-555-1746						Father				
	No Name:226476 <momanddad@PSSIS.com>									Guardian				
	Macy Abplanalp			281-653-5550					✓	Emergency 1				
	No Name:226479			1-555-555-2607					✓	Emergency 2				

Contact #1

Contact Name (Last, First)

Phone

Contact #2

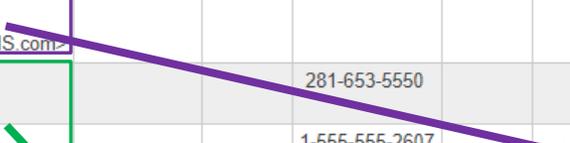
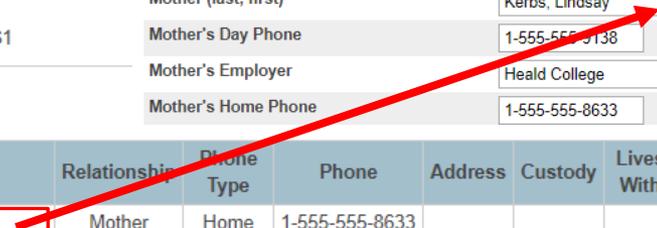
Contact Name (Last, First)

Phone

Guardian Email

Guardian's Email Address:

Submit



STUDENT CONTACTS

DATA CLEANING CONSIDERATIONS
WHEN MOVING FROM LEGACY DATA

CONSIDERATIONS/COMPLICATIONS

1. Backup your data!

2. It is Recommend that you create an Export File of Legacy Contact Data.

Fields exported should include:

Student_number

Lastfirst

Grade_level

schoolid

Mother

Mother_home_phone

Motherdayphone

Mother_employer

Father

Father_home_phone

Fatherdayphone

Father_employer

Guardian_LN

Guardian_FN

Guardianemail

Emerg_Contact_1

Emerg_1_rel

Emerg_Phone_1

Emerg_1_ptype

Emerg_Contact_2

Emerg_2_rel

Emerg_Phone_2

Emerg_2_ptype

Emerg_Contact_3

Emerg_3_rel

Emerg_3_Phone

Emerg_3_ptype

CONSIDERATIONS/COMPLICATIONS (CON'T)

3. Is there a specific order you need Contacts to be listed?

The order of contacts can be important when using the DAT code of ^(contact_info). In order to maintain consistency with reporting it is recommended that you establish the order in which contacts are listed for each student.

4. Do you need to maintain your Legacy Contact Fields?

If Yes:

A. Do **NOT** merge guardian Email with other contact records – this will delete the guardianemail field.

Note: (V.12 required that multiple email addresses in the Guardianemail field **MUST** be comma separated)

CONSIDERATIONS/COMPLICATIONS (CON'T)

B. Do **NOT** change the Phone Type from Home or Daytime for Mother or Father Records. These types sync back to the Mother/Father Home Phone and Day Phone fields. Changing the Phone Type will remove the phone numbers from the legacy fields.

Note: Phone fields may not contain more than 40 characters.

C. If more than one Home or Daytime phone number is entered under the new Contact structure only the first one listed will sync back to the legacy fields.

D. Are parents also listed as emergency Contacts 1, 2 or 3?
If so, and you merge records, keeping Mother or Father as the Original Contact Type it will erase the data in the Emergency Contact Legacy fields.

CONSIDERATIONS/COMPLICATIONS (CON'T)

5. Overlapping Original Contact Types

If a contact has one or more original contact types (Mother, Father, Guardian, Emergency Contact) you will need to decide which contact type to retain.

During the consolidation process you will need to remove the duplicate role.

Once removed that data will no longer exist in the Legacy fields.

EX: If a contact is listed as both Mother and Emergency Contact 1, and you retain the Original Contact Type of Mother, the data from both roles will be consolidated into the new contact, however, the data associated to the role of Emergency Contact 1 will be deleted from the legacy fields

CONSIDERATIONS/COMPLICATIONS (CON'T)

6. Multiple Parent Access Accounts?

If multiple Parent access accounts exist for a contact, decide which to keep.

When selecting accounts to consolidate, the first one selected will default to the Master Record.

When multiple records are being merged and there is more than one Parent Access account you must set the Parent Access Account you wish to keep as the Master Record.

Always verify through the Review screen that the correct account is set as the Master Record. Once consolidated PS will retain the Master record (Parent Access Account) and delete the other accounts.

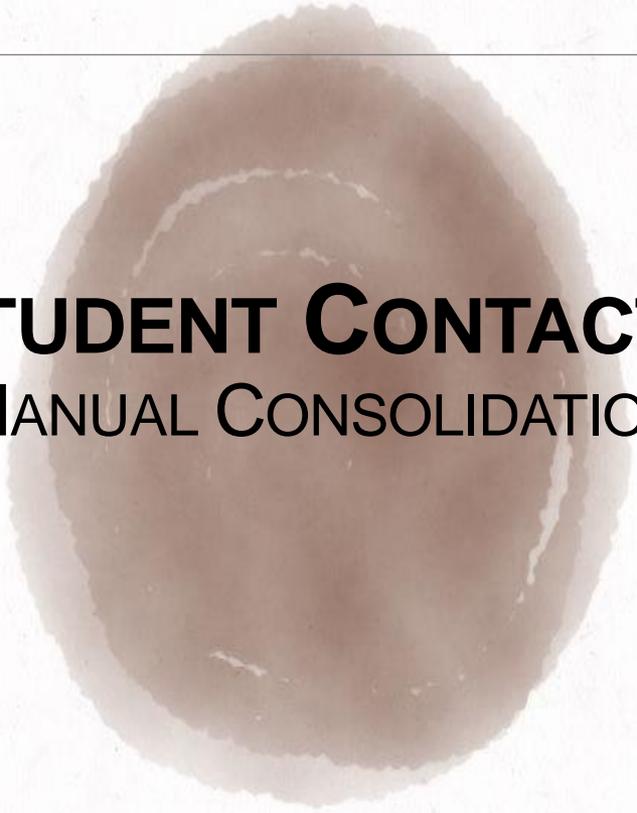
7. Email addresses

Email addresses must be configured appropriately. And there are no blank spaces at the end of the email address.

CONSIDERATIONS/COMPLICATIONS (CON'T)

8. When updating through import:

If two records exist for a single contact (unique Contact id's) all data must be associated to one record. The other will need to be deleted. The record to be deleted must come first in the import file.



STUDENT CONTACTS

MANUAL CONSOLIDATION

SEARCH FOR DUPLICATES

Search results (509)

Contact	Access Account	Street Address	Phone Number	Email Address	Associated Student(s)
Abplanalp, Macy			281-653-5550 281-653-6890		Kerbs, Adam Kerbs, Michael Kerbs, Michael
					Kerbs, Michael
Adair, Adam			945-555-1014		Adair, Brandon
Adair, Adam			979-555-1014		Adair, Brandon
Adair, Adam			979-555-1014		Adair, Justin
Adair, Adam			979-555-1014		Adair, Brandon
Adair, John	✓				
Adair, Willima			1-555-555-8124 1-555-555-9027		Adair, Brandon
Adair, Willima			916-555-8124 281-653-3605		Adair, Brandon
Adair, Willima			916-555-8124 281-653-3605		Adair, Justin
Adair, Willima			916-555-8124 281-653-3605		Adair, Brandon

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Select By Hand

SELECT RECORDS TO MERGE

<input checked="" type="checkbox"/>	Adair, Adam			945-555-1014		Adair, Brandon
<input checked="" type="checkbox"/>	Adair, Adam			979-555-1014		Adair, Brandon
<input checked="" type="checkbox"/>	Adair, Adam			979-555-1014		Adair, Justin
<input checked="" type="checkbox"/>	Adair, Adam			979-555-1014		Adair, Brandon
<input type="checkbox"/>	Adair, John	✓				
<input type="checkbox"/>	Adair, Willima			1-555-555-8124 1-555-555-9027		Adair, Brandon
<input type="checkbox"/>	Adair, Willima			916-555-8124 281-653-3605		Adair, Brandon
<input type="checkbox"/>	Adair, Willima			916-555-8124 281-653-3605		Adair, Justin
<input type="checkbox"/>	Adair, Willima			916-555-8124 281-653-3605		Adair, Brandon

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VIEW/EDIT BEFORE CONSOLIDATION

Consolidate Contacts

[Hide Main Menu](#)

Master	Access Account	Contact Name	Phones	Email Addresses	Addresses	Students (Original Contact Type)
<input checked="" type="radio"/>		Adair, Adam	Home: 1-555-555-1014			Adair, Brandon (Father)
<input type="radio"/>		Adair, Adam	Home: 979-555-1014			Adair, Justin (Father)
<input type="radio"/>		Adair, Adam	Home: 979-555-1014			Adair, Brandon (Father)
<input type="radio"/>		Adair, Adam	Home: 979-555-1014			Adair, Brandon (Father)

Consolidate All Data Keep Master Only

Modify any "bad" data prior to consolidating!

Used 99% of the time

CONSOLIDATE!

Consolidated Contact

Demographics

Web Account Access

Students

Show All (10)

Add Students

School	Name	Relationship	Custody	Lives With	School Pickup	Emerg. Contact	Original Contact Type	Start Date	End Date	Data Access	Action
AGHS1	Adair, Brandon	Father					Father				
Graduated Students	Adair, Brandon	Father					Father				
Graduated Students	Adair, Brandon	Father					Father				
SCMS	Adair, Justin						Father				

Confirm Consolidation

You are about to save the data on this page to a single consolidated contact:

- Adam Adair (ID 225184)

And effectively delete the contact(s) named:

- Adam Adair (ID 228590)
- Adam Adair (ID 235478)
- Adam Adair (ID 235605)

This action irreversible. If present, only the web access account of the consolidated contact will remain active. Be sure any additional or custom data tied to these contacts has been consolidated outside of these pages.

Submit Consolidation

Adair, Adam

945-555-1014
979-555-1014

Adair, Brandon
Adair, Brandon
Adair, Brandon
Adair, Justin

MERGED RECORDS

Search results (506)

Contact	Access Account	Street Address	Phone Number	Email Address	Associated Student(s)
Abplanalp, Macy			281-653-5550 281-653-6890		Kerbs, Adam Kerbs, Michael Kerbs, Michael
Adair, Adam			945-555-1014 979-555-1014		Adair, Brandon Adair, Brandon Adair, Brandon Adair, Justin
Adair, John	✓				
Adair, Willima			1-555-555-8124 1-555-555-9027		Adair, Brandon
Adair, Willima			916-555-8124 281-653-3605		Adair, Brandon
Adair, Willima			916-555-8124 281-653-3605		Adair, Justin
Adair, Willima			916-555-8124 281-653-3605		Adair, Brandon
Adams, Barbara			1-555-555-3273		Adams, Julie
Adams, Barbara			916-555-3273		Adams, Julie
Adams, Barbara			916-555-3273		Adams, Julie

Select By Hand

STUDENT CONTACT KB ARTICLES

Getting Started with Student Contacts

KB# 79790

Student Contacts FAQ

KB# 79788

Student Contacts Lab

KB# 8603

Student Contacts Known Issues

KB# 79789

Student Contacts Import Template

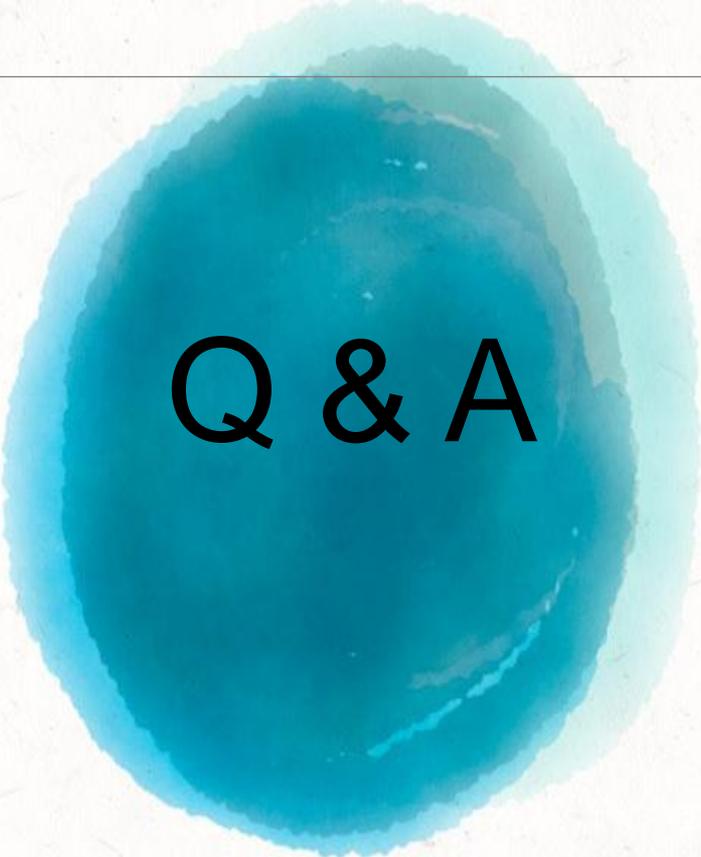
KB# 83233

Student Contacts: Original Contact Name Changes in Custom Pages

KB# 79792

NEW DATA ACCESS TAG

^(*Contact_Info)



Q & A

