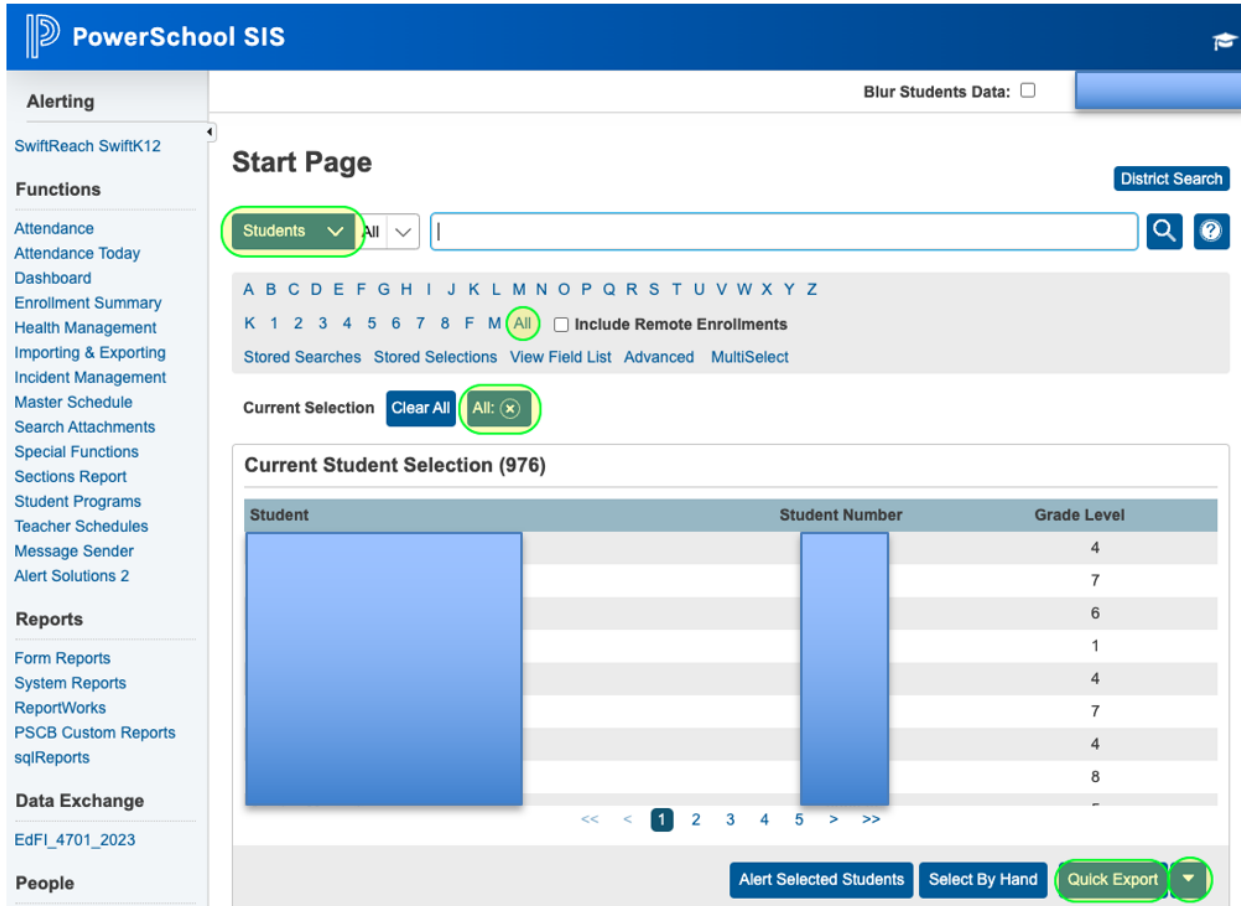


# Consolidating Contacts

**Step 1** – Run a 'Quick Export' to create a copy of **all** your Students' Contacts.



**Step 2** – Make sure that **all** of your Students have Contacts in their **Unlimited Contacts** (Core Contacts) page.

In the situation shown below, we see that the student does have Contacts. Some of these Contacts will be consolidated as discussed later beginning in step 6. It is important to note that your school utilizes Swift K-12 (Swift Reach), and it is possible that you may need to keep your 'Guardian' Contact, even though after renaming the 'No Name' to an actual Mother or Father's name, you will be left with a Duplicate Contact. Swift K-12, may very well be set up in your school to utilize this Guardian Contact as the primary contact.

Start Page > Student Selection > Contacts (Unlimited Contacts)

The screenshot shows the 'Contacts' page in PowerSchool SIS. The table lists parent contacts with columns for Order, Name / Email, Relationship, Phone Type, Phone, Address, Custody, Lives With, School Pickup, Emerg. Contact, Original Contact Type, Start Date, End Date, Data Access, and Actions. Annotations include green circles around 'Mother', 'Father', and 'Guardian' in the 'Original Contact Type' column, and a red box around 'No Name-912065' in the 'Name / Email' column. A note explains that the 'No Name' contact was created from a Guardian email and should be changed to the Mother's name. Other notes indicate that contacts with phone numbers 29607 were likely created when a parent made their account or merged level data.

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
		Mother	Home	90						Mother				
		Father	Daytime	93						Father				
	No Name-912065 <[redacted]@gmail.com>									Guardian				
							29607							
							29607							

**Step 3** – Make sure that the Guardian information on the **SC Student Contacts** page (top portion) has a First and Last Name along with an email address and phone numbers.

**Note 1:** Often the 'Guardian Contact' is created with **No Name** with only the email field populated. This is due to the 'Guardian Email' field being populated during enrollment and/or when filled out on the Student's Demographics page.

**Note 2:** If the Guardian email is the same as either the Mother's or Father's email this will create a Duplicate Contact, **but this can be resolved when the contacts are consolidated (Please read Important Message below).**

Important: Please check with your School's Swift K-12 administrator, and/or the District to determine how you should proceed with the 'Guardian' Contact prior to (Step 6) consolidating/merging that Contacts with one of the Parent Contacts.

[Start Page](#) > [Student Selection](#) > [South Carolina State Information](#) > [Contacts \(SC Top Portion\)](#)

**PowerSchool SIS**

Start Page > Student Selection > South Carolina State Information > Contacts

Blur Students Data:

22-23 Quarter 3

**Contacts**

Chronic Absenteeism Truancy CTE Early Childhood SC Student Information MLP Read To Succeed Precode Students Not Tested Transport

Work-Based Learning Privacy and Security

**Student Addresses**

Home:

Mailing:

**Parents/Contacts**

	Home Ph	Day/Wrk Ph	Employer	Email
Mother(LN, FN): Abraham	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Father(LN, FN): Abraham	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Guardian(LN, FN, MN): <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Guardian Relationship: <input type="text"/>				
Guardian Alert: <input type="text"/>	Comments: <input type="text"/>			

400 characters left

**Step 4** – Make sure that the Contacts list on the SC Student Contacts page (**bottom portion**) has at **least Contact 1** populated with the correct information.

Start Page > Student Selection > South Carolina State Information > Contacts (SC Bottom Portion)

	Name	Relationship	Hm Ph	Wrk Ph	Cell Ph	Emergency	Custody	Lives With	Rcvs Mail	Email	Address	Employer	
Edit	Contact 1	Mother	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Show Full Copy
Edit	Contact 2	Father	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Show Full Copy
Edit	Contact 3	Aunt	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>				<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Show Full Copy
Edit	Contact 4												
Edit	Contact 5												
Edit	Contact 6												
Edit	Contact 7												
Edit	Contact 8												
Edit	Contact 9												
Edit	Contact 10												

**Step 5** – If additional information has been made available (**Contacts 2 - Contacts 10**) and is listed in the SC Students Contacts page (**bottom portion**), ensure that the information is also made available in the Student’s **Unlimited Contacts page** as well. This may include manually adding that information into the ‘Unlimited Contacts’ page.

Note: It is also possible that the Contacts listed were merged into the 'Unlimited Contacts' (Core Contacts) via a previous Level Data operation.

Start Page > Student Selection > South Carolina State Information > Contacts (SC Bottom Portion)

	Name	Relationship	Hm Ph	Wrk Ph	Cell Ph	Emergency	Custody	Lives With	Rcv's Mail	Email	Address	Employer		
Edit	Contact 1	Mother				✓		✓	✓		✓	✓	Show Full	Copy
Edit	Contact 2	Father				✓		✓			✓	✓	Show Full	Copy
Edit	Contact 3	Aunt				✓							Show Full	Copy
Edit	Contact 4													
Edit	Contact 5	The 3 Contacts listed above have likely been merged into the 'Unlimited Contacts' (Core Contacts) via a previous Level Data operation												
Edit	Contact 6													
Edit	Contact 7													
Edit	Contact 8													
Edit	Contact 9													
Edit	Contact 10													

Start Page > Student Selection > Contacts (Unlimited Contacts)

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
1	Sheenu Abraham	Mother	Home							Mother				✓
2	George Abraham	Father	Daytime							Father				✓
3	No Name:912065 <sheenu.abraham@gmail.com>	Mother	Mobile							Guardian				✓
4		Father	Mobile											✓
5		Aunt	Mobile											✓

**Step 6** – Run the PSCB Custom Report - Contacts - **Duplicate Contacts Report** to begin consolidating/merging Duplicate Contacts that are found in this report.

**Note:** Remember to **select all of your students** prior to running this report.

Start Page > PSCB Custom Reports > Contacts

PowerSchool SIS

Start Page > PSCB Custom Reports > Contacts

Blur Students Data:  22-23 Quarter 3

SwiftReach SwiftK12

**Functions**

- Attendance
- Attendance Today
- Dashboard
- Enrollment Summary
- Health Management
- Importing & Exporting
- Incident Management
- Master Schedule
- Search Attachments
- Special Functions
- Sections Report
- Student Programs
- Teacher Schedules
- Message Sender
- Alert Solutions 2

**Reports**

- Form Reports
- System Reports
- ReportWorks
- PSCB Custom Reports
- sqlReports

**PSCB Custom Reports - Contacts**

Custom Reports - Contacts	Description
Contacts - Duplicates	View Duplicate Contacts list.
Contacts - Phone Number Search	Search all contact phone numbers for a partial or complete phone number match.
Contacts - Students List	Lists contacts information and associated students.

Custom Reports - Students	Description
Students - Contacts Access List	View a list of students whose contacts have not accessed their accounts for a selected date range.
Students - Contacts Address List	Lists contacts address information for each student.
Students - Contacts List	Lists contacts information for each student.

**Note:** If the report finds Contacts of **students who are in another school's system**, you will want to **contact that school** to let them know if you consolidate the information. Remember that during the Consolidation process, the Web Access account (Parent Portal account) is merged, and this could potentially impact a parents ability to log in to their Parent Portal at another school.

Start Page > PSCB Custom Reports > Contacts > Contacts - Duplicate Contacts

PowerSchool SIS

Start Page > PSCB Custom Reports > Contacts > Contacts - Duplicate Contacts

Blur Students Data:  22-23 Quarter 3

**Contacts - Duplicate Contacts**

**Report Filters**

Student Selection

Current Selection (976)

Submit Select parameters and click submit

**Contacts - Student List** Total Records: 12550

Copy CSV TSV Print PDF

Contact ID	Contact Name	Phone Numbers	Email Address	Student(s)
730805				(10 - GUHS)
730805				(6 - GCSG)
931650				(10 - GUHS)
931654				
931649				

**Step 7** - Review and Consolidate your Contacts. Make sure that the Contacts on your 'Consolidated Contact' page are as you would like to be. Check your Web Access Account (Parent Portal account),

Students listed, Contact's Phone Numbers, Data Access and the Contact's Email. Once you are sure that the information on the page is correct, click 'Submit' and then 'OK' when the pop-up warning appears. You will now have just the one Contact.

[Start Page](#) > Edit Contact

### Consolidate Contacts

Master	Exclude	Access Account	Contact Name	Phones	Email Addresses	Addresses	Students (Original Contact Type)
<input type="radio"/>	<input type="checkbox"/>						
<input checked="" type="radio"/>	<input type="checkbox"/>						(Father)

Consolidate All Data  Keep Master Only

## Confirm Consolidation



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

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

- [Redacted] (ID 894065)

And delete the contact(s) named:

- [Redacted] (ID 966492)

**Step 8** – After using the PSCB Duplicate Contacts report to consolidate as many Duplicate Contacts as you can, search your **Students' Contacts** individually to see the newly consolidated Contact list for each student. By using the Contacts listed there, search the District Unlimited Contacts' (Core Contacts) by Last Name and then First Name to see if additional Contacts are still left to be consolidated/merged.

**Note:** Emergency/Medical Contacts, Relatives (Aunts, Uncles etc.), and sometimes even different spelling of a person's name, **can be missed by the PSCB Duplicate Contact Report that was previously run.**

[Start Page](#) > [Student Selection](#) > Contacts

PowerSchool SIS

Start Page > Student Selection > Contacts

Blur Students Data:

22-23 Year

Change History

### Contacts

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
1	[Redacted]	Mother	Home	[Redacted]	[Redacted]					Guardian			✓	<a href="#">Edit</a> <a href="#">Delete</a>
2	[Redacted]	Father	Home	[Redacted]	[Redacted]					Father				<a href="#">Edit</a> <a href="#">Delete</a>
3	[Redacted]	Grandfather		[Redacted]	[Redacted]					Emergency 1				<a href="#">Edit</a> <a href="#">Delete</a>
4	[Redacted]	Grandmother		[Redacted]	[Redacted]					Emergency 2				<a href="#">Edit</a> <a href="#">Delete</a>
5	[Redacted]	Uncle		[Redacted]	[Redacted]					Emergency 3				<a href="#">Edit</a> <a href="#">Delete</a>
6	[Redacted]	Mother	Home	[Redacted]	[Redacted]					Mother				<a href="#">Edit</a> <a href="#">Delete</a>

**Step 9** – If additional work is needed, choose the listed Contacts by using the ‘**Select By Hand**’ feature, **check mark the Contacts you would like to consolidate**, and then select the ‘**Consolidate Contact**’ feature.

PowerSchool SIS

Blur Students Data:

### Start Page

[District Search](#)

Students  All

Students  3 4 5 6 F M All  Include Remote Enrollments

Staff

**Contacts**  [Archives](#) [Stored Selections](#) [View Field List](#) [Advanced](#) [MultiSelect](#)

Current Selection [Clear All](#) All:

## Start Page

Contacts  Last Name

Status  All  Access Status  All   Filter By Current Student Selection (107)

Search results (0)

## Start Page

**Contacts** ▾ **First Name** ▾

**Status** **All** ▾ **Access Status** **All** ▾  **Filter By Current Student Selection (107)**

**Current Search** **Clear All** **Last Name:**

**Search results (20)**

## Start Page

**District Search**

**Contacts** ▾ **Street Address** ▾

**Status** **All** ▾ **Access Status** **All** ▾  **Filter By Current Student Selection (107)**

**Current Search** **Clear All** **Last Name:**   **First Name:**

**Search results (1)**

Contact	Access Account	Street Address	Phone Number	Email Address	Associated Student(s)
<input type="text"/>			<input type="text"/>		<input type="text"/>

**Search results (1)**

<input checked="" type="checkbox"/>	Contact	Access Account	Street Address	Phone Number	Email Address	Associated Student(s)
<input checked="" type="checkbox"/>	<input type="text"/>			<input type="text"/>		<input type="text"/>

▾

In the above example, there is only one Contact made for the above example, so there is no need to attempt to Consolidate. However, **if there had been a Contact created for “example” as an uncle and a Contact created for “example” as an Emergency Contact**, you would want to ‘Select By Hand’, check the two Contacts and ‘Consolidate Contacts’.



**Important: Each school that I have worked with to consolidate Contacts has been unique. You may find that in addition to the above information, that you may add a step along the way.**

I have additional information I can provide to you regarding the PSCB Duplicate Contact report, if you are running into issues with the report. Please let me know if I can help in any additional way as you go through the Contact consolidation process, and if you would like to schedule a meeting to review your unique situation. Level Data also has a workflow that can be followed (link below)

<https://www.leveldata.com/blog/how-to-easily-manage-unlimited-contacts-in-powerschool>