## **Consolidating Contacts**

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SwiftReach SwiftK12 Functions	Start Page			District Search
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dFI_4701_2023 <b>'eople</b>			Alert Selected Students	Select By Hand Quick Export

**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)

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**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)

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Acces Addre Attach Conta Custo Demo Docur Emerg	s Accounts sses iments cts m Screens graphics ment Delivery gency/Medical	Student Addresses       Home:       Mailing:       Parents/Contacts
Family Health Modify Other Stude Paren Photo State	y Info Information nt Email Its Province - SC	Home Ph Day/Wrk Ph Employer Email Father(LN,FN): Guardian(LN,FN,IMN): Guardian Relationship: Guardian Abdrit
Trans Regis Forms	portation tration is	Guardian Alert:

**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.

Culick Lookup															: /	-
Switch Student List (976)			Name	Relationship	Hm Ph	Wrk Ph	Cell Ph	Emergency	Custody	Lives With	Rcvs Mail	Email	Address	Employer		
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I Overview	Edit	Contact 2		Father				4		4			1	1	Show Full	Co
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gency/Medical ly	Edit	Contact 7														
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nt Email ts	Edit	Contact 9														
Province - SC	Edit	Contact 10														

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

**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.

Quick Lookup															× /	-
Print A Report Switch Student			Name	Relationship	Hm Ph	Wrk Ph	Cell Ph	Emergency	Custody	Lives With	Rcvs Mail	Email	Address	Employer		
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tudent Email arents	Edit	Contact 9														
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Start Page > Student Selection > South Carolina State Information > Contacts (SC Bottom Portion)

#### Start Page > Student Selection > Contacts (Unlimited Contacts)

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Demog	graphics nent Delivery			George Abraham	Father	Daytime							Father				
Emerg	ency/Medical		•	No Name:912065 <sheenu.abraham@gmail.com></sheenu.abraham@gmail.com>									Guardian				
Health Modify	r Info				Mother	Mobile				Likely	created wi	hen Parent	made their 'l	Parent F	ortal' a	count	
Other I Studen	Information nt Email		• •		Father	Mobile				Possib	ly created	when Leve	I Data meror	d 'SC C	ontact	2	
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**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

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PSCB Custom Reports	Start Page > PSCB Custom Reports > Contacts	Blur Students Data:				22-23 0	Quarter 3 🗸
SwiftReach SwiftK12	PSCB Custom Reports -	Contacts					
Attendance Attendance Today	Custom Reports - Contacts	Description					
Dashboard Enrollment Summary Health Management	Contacts - Duplicates Contacts - Phone Number Search	View Duplicate Contacts list. Search all contact phone numbers for a partial or complete phone number match.					
Importing & Exporting Incident Management	Contacts - Students List	Lists contacts information and associated students.					
Master Schedule Search Attachments	Custom Reports - Students Students - Contacts Access List	Description View a list of students whose contacts have/have not accessed their accounts for a selected date range.					
Sections Report	Students - Contacts Address List	Lists contacts address information for each student.					
Teacher Schedules Message Sender	Students - Contacts List	Lists contacts information for each student.					
Alert Solutions 2							
Form Reports System Reports ReportWorks PSCB Custom Reports sqlReports							

**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 >	<b>PSCB Custom Reports</b>	; >	Contacts >	Contacts -	Duplicate	Contacts
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Current Sele	iection (976) 🗸					
Submit S	elect parameters and click sub	mit				
Contacts -	- Student List				Total	Records: 12550
Contacts ·	- Student List				Total	Records: 12550
Contacts · Copy CS Contact ID	Student List      TSV Print PDF      Contact Name	Phone Numbers	Email Address		Total ♦ Student(s)	Records: 12550
Contacts · Copy CS Contact ID	Student List     TSV Print PDF     Contact Name	Phone Numbers	Email Address		Student(s)	Records: 12550 *
Contacts · Copy CS Contact ID 730805	- Student List SV TSV Print PDF   Contact Name	Phone Numbers	e Email Address		Student(s)	Records: 12550 * d(10-GUHS) 0.6-GCSG)
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**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)
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### **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:

- (ID 894065)
- And delete the contact(s) named:

• (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

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SwiftK12 Alerting																
Portal Overview Student Preferences															Show All	(+0) Add
Information		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
Access Accounts Addresses			cminiman#06@unkan.sam?	Mother	Home							Guardian			1	28
Attachments Contacts				Father	Home							Father				
Custom Screens Demographics				Grandfather								Emergency 1				
Emergency/Medical Family				Grandmother								Emergency 2				28
Health Modify Info				Uncle								Emergency 3				28
Other Information Student Email				Mother	Home							Mother				
Parents																

**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.

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Functions		Blur Students Data: 🗌 Si
Attendance Attendance / Enrollment Attendance Report Attendance Today	Students X All X	District Search
Dashboard Enrollment Summary Health Management Importing & Exporting Incident Management	Students     XII       Students       Staff       3 4 5 6 F M All       Include Remote Enrollments       Staff       Contacts       Arches Stored Selections       View Field List       Advanced       MultiSelect	
Master Schedule Search Attachments	Current Selection Clear All All: 🛞	

#### Start Page



Start Page					
Contacts 🗸 F	irst Name				
Status All V Access Status All V Differ By Current Student Selection (107)					
Current Search Clear All Last Name:					
Search results (20)					
Start Page					District Search
Contacts V Street Address V					
Status 📶 🗸 Access Status 🗐 Clifter 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)
					Select By Hand
-					
Search results (1)					
Contact	Access Account	Street Address	Phone Number	Email Address	Associated Student(s)
				Cancel	Consolidate Contacts

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