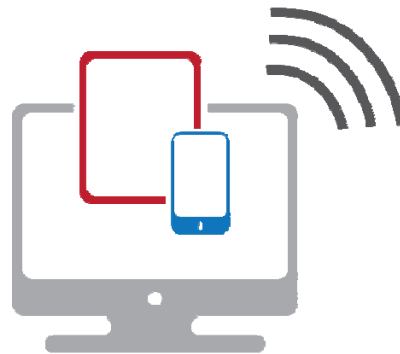


# PSUG VIRTUAL ACADEMY

Users Helping Users



PSUG *Events*  
VIRTUAL Conference

# Working with Student Contacts

## PowerSchool Student Information System



**Lisa Cahall**

**Level Data**

**Educational Data Specialist**



**VIRTUAL Conference**

# About the trainer. . .

## Experience:

- 30+ Years in Education, the last 18 using PowerSchool at all levels (teacher, School Admin, District Admin).
- 17 years as a Middle School History and Computer Teacher as well as an Assistant Principal.
- 3 years as the Technology Coordinator for the Diocese of Wilmington, Delaware
- 13 years as a PowerSchool Support Specialist for Computer Logic Group (CLG).
- Moved to Level Data January of this year (2020)
- PowerSchool Certified for IPT, PowerTeacher PRO and APEX/Enterprise Reporting

## Personal:

- I am from Smyrna, Delaware and am Married with two girls ages 34 and 12.
- Presenter for the PSUG Events for 10 years



**PowerTeacher Pro**  
Certified PowerSchool PowerUser



**Enterprise Reporting**  
Certified PowerSchool PowerUser 2018



# Agenda

- **Overview/Migration**
  - What is Student Contacts?
  - Where does the initial data come from?
  - Which Type of Contacts can be tracked?
  - Keeping records in sync
- **Interface**
  - What does the interface look like?
  - What Contact data is stored?
  - Viewing/Editing Records - Parent View
  - Viewing/Editing Records - Student View
- **Data Clean up Options**
  - Code Sets
    - 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 is Student Contacts

- Student Contacts is PowerSchool's new format for tracking Student Contact information. This new system will allow for a more inclusive system that shows interconnected relationships between students and contacts as well as allowing for the tracking of more contact data.
- This new system will allow the user to have a single contact linked to multiple students (regardless of school) and will allow for a user to make necessary changes to a single contact which will then propagate to all student relationships.
- Student Contacts ties everything together in a single system while maintaining backward compatibility with original contact data, such as Mother, Father, Guardian and/or Emergency Contacts



# What type of Contacts can be Tracked?

- Student Contacts are no longer defined by a single Mother or Father. Nor are there limits to the number of Emergency Contacts that can be associated to each student. There are 11 initial designations for parent/contact relationships. However, each designation can be used more than once.

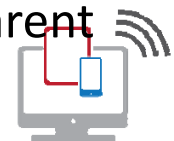
- **New Relationship Designations include:**

<b>Mother</b>	<b>Father</b>
<b>Sister</b>	<b>Brother</b>
<b>Aunt</b>	<b>Uncle</b>
<b>Grandmother</b>	<b>Grandfather</b>
<b>Friend</b>	<b>Neighbor</b>
<b>Other</b>	



# What information can be stored for each Contact?

- Student Contacts now allows for multiple entries addresses, phone numbers and email addresses.
  - **Phone Numbers** – Can be designated as Daytime/Home/Work/Mobile, as well as prioritized in order of importance for use in an Emergency situation.
  - **Email Addresses** – Can be designated as Current or Additional
  - **Street Addresses** – Can be designated as either Home or Mailing. In addition, Addresses allow for a Start/End date so a history of address change can be retained.
- Each Contact can now be identified with the following access:
  - Has custody
  - Lives With
  - School Pickup
  - Emergency Contact
  - Receives Mail
- Each Contact can now have a Starting/Ending date to allow for access to Historical recording.
- Email Preferences for Parent Access Accounts linked through the Parent Contact Screen.





# Student Contacts Interface



# New 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

New Search Fields

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

Use to include inactive  
Contacts in returned list!

Search



# New 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



# New Contacts Tab – Parent View

## Contact Details



The screenshot shows a form titled "Contact Details" with six sections, each with a collapse icon (a right-pointing triangle) on the left. Red arrows point from the text "6 collapsible sections" to each of these sections:

- Demographics
- Web Account Access
- Students
- Phone Numbers
- Email Addresses
- Addresses

At the bottom right of the form are two buttons: "Delete" and "Submit".



# Parent View - Demographics and Web Access

▼ Demographics

Prefix

First Name

Middle Name

Last Name

Suffix

▼

Ash

Adair

\*

▼

Gender

Female (F) ▼

Employer

Housewife

☐ Exclude From State Reporting

☒ Active

▼ Web Account Access

Account Locked/Disabled

☐

Username

Ash

New Password

Confirm Password

Recovery Email

ash@email.com

Select existing email ▼



# Parent View – Students 1

Students											
											<input type="checkbox"/> 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**

\* [?]



# Parent View – Students 2

Students

Show All (+0) Add Students

Details: Adair, Brandon 3

School Pickup	Emerg. Contact	Original Contact Type	Start Date	End Date	Data Access	Action
						<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

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

No Start Date - No End Date

Cancel Ok

Details: Adair, Brandon 3

Active All Data Access

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

Cancel Ok

Lists historical Contact info

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

# Parent View – Phone Numbers

▼ Phone Numbers

Prioritize order of phone numbers

Set preferred #

Order	Type	Phone Number	Preferred	SMS	Action
<div>▲ ▼</div>	Mobile	208-888-6666	✓		<div>✎ -</div>
<div>▲ ▼</div>	Home	555-234-3456		✓	<div>✎ -</div>

Add Phone

**Add Phone**

Type 

▼

Daytime

Home

Mobile

Work

Phone Number

Extension

SMS ☐ (Accepts text messaging)

Preferred ☐

**Edit Phone**

Type 

▼

 Mobile

Phone Number


 208-888-6666 \*

Extension

SMS ☐ (Accepts text messaging)

Preferred ☒

Cancel Ok







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# Parent View – Email Addresses


▼ Email Addresses

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

**Add Email**

**Add Email Address** 

Type 

Email Address    \*









Primary ☐

**Cancel** **Ok**

# Parent 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	123 East Elm ST		Jackson	Mississippi (MS)	39209	United States (US)	1/1/2010	2/11/2018	 

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

Add Address


Type 


Address Line 1  Home Mailing

Address Line 2


Unit


City

Country 

State/Province 

Postal Code


Start Date MM/DD/YYYY 

End Date MM/DD/YYYY 





















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



# Student View – Contacts

Contacts 

Kerbs, Michael 10 1040 AGHS1

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				 

Father (last, first)

Kerbs, Dustin

Father's Day Phone

Father's Employer

San Francisco Forty-Niners

Father's Home Phone

1-555-555-1746

Gender

...

Grade Level

Graduation Year

Guardianship

Guardian Email

Mother (last, first)

Kerbs, Lindsay

Mother's Day Phone

1-555-555-9138

Mother's Employer

Heald College

Mother's Home Phone

1-555-555-8633

Parent Information

Mother's Name

Kerbs, Lindsay

Daytime Phone

1-555-555-9138

Father's Name

Kerbs, Dustin

Daytime Phone

Show All (+0)

Add

Contact #1

Contact Name (Last, First)

Abplanalp, Macy

Phone

281-653-5550

Contact #2

Contact Name (Last, First)

Phone

1-555-555-2607

Guardian Email

Guardian's Email Address:

momanddad@PSSIS.com

Relationship

Phone Type

Submit

# **Student Contacts Data Cleaning Considerations**



# Considerations/Complications

1. **Backup your data!**
2. **It is Recommend that you create an Export File of Contact Data prior to upgrading.**

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 when 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 requires that multiple email addresses in the Guardianemail field **MUST** be comma separated. If another separator is used you will not be able to save changes on the Parent or Demographic screens until you update the separator in this field.)



# 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 there are multiple Parent access accounts associated to a contact you will need to decide which to keep. This will involve reviewing student records to find out if students are active. In some cases, you may need to contact the parent to find out which account is being used.

When selecting accounts to consolidate, the first one you click on will be the one defaulted as the Master Record. In the case where you are merging multiple records and there is more than one Parent Access account set the Parent Access Account record you wish to keep as the Master Record. Always verify on 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 in an appropriate format. If, when consolidating you return an unknown system error, check to be sure email addresses are configured properly and there aren't any blank spaces at the end.



# Considerations/Complications (con't)

## 8. When updating through import:

If two records exist for a single contact (separate Contact id's) you will need update one of the records with all of the data you wish to keep and then delete the other record. In this case the record to be deleted must come first in the import file.

## 9. Deleting students.

Once using Student Contacts, it is not recommended that you delete student contacts. This is because student data is merged to the new tables. If you must delete a student then it is recommended that you:

- A. Remove all related contacts. Delete the contact if it is only linked to this student remove student from the contact account.
- B. Once removed delete the student from the Students Table.
- C. Search Contacts for the student (student will become a contact once deleted from the Students table.)
- D. Delete the Student Contact Record



# **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

Phone Numbers

Email Addresses

Addresses

Show All (4)

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				
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.

Cancel

Ok

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 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

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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



Lisa Cahall  
lcahallpsc@gmail.com

