



# WORKING WITH STUDENT CONTACTS IN POWERSCHOOL

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## AGENDA

- Overview/Migration
  - What are Student Contacts?
  - Which type of Contacts can be tracked?
  - Legacy Compatibility
- Interface
  - What does the interface look like?
  - What Contact data is stored?
  - Viewing/Editing Records – Parent View
  - Viewing/Editing Records – Student View
- Data Considerations
- PSCB Custom Reports
- Manual Contacts Migration

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## STUDENT CONTACTS OVERVIEW/MIGRATION



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### 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).

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## WHAT TYPE OF STUDENT CONTACTS CAN BE TRACKED?

- Student Contacts includes 11 initial relationship types.
- Additional types may exist based on existing Emergency Contact Relationship 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	

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## CONTACT DATA CAN INCLUDE:

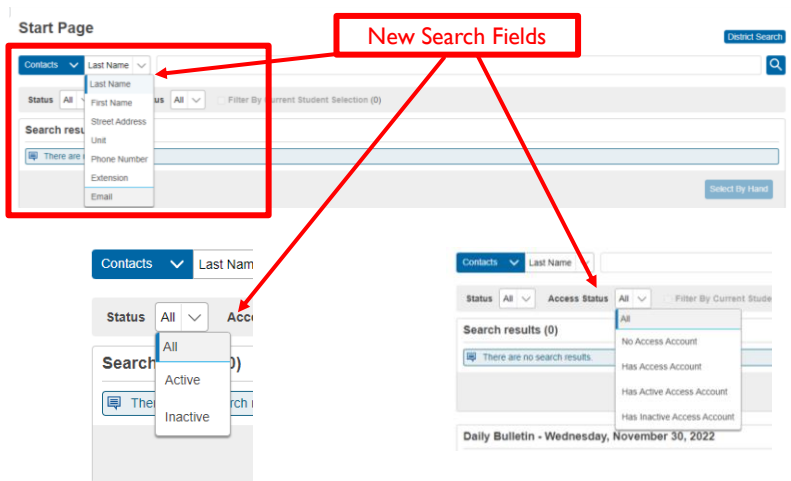
- Student Contacts allows for multiple entries for each contact value.
  - Phone Numbers
    - Phone Types include Daytime, Home, Work and Mobile.
    - Numbers can be prioritized and/or set as Preferred for use in an Emergency situation.
  - Email Addresses
    - Email Types include Current or Additional
    - Email addresses 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.
- Contacts' student association can be flagged as:
  - Lives With
  - Has Custody
  - School Pickup
  - Emergency Contact
  - Receives Mail
- Contact records have a Start/Ending date
- Email Preferences for Parent Access Accounts are linked through the Parent Contact Screen

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# STUDENT CONTACTS INTERFACE

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## CONTACTS TAB



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# CONTACTSTAB – SEARCH RESULTS

Search results (499)

Contact	Access Account	Street Address	Phone Number	Email Address	Associated Student(s)
Abplanalp, Macy	✓		1-555-555-0890 281-653-6890	changell@email.com	Kerbs, Adam Kerbs, Adam Kerbs, Michael Kerbs, Michael
Adair, Adam	✓		203-222-1234 555-555-5555 555-555-1014 979-555-1014	adair@noemail.com lest@lest678.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, Wilma			916-555-8124 281-653-3805		Adair, Brandon Adair, Brandon
Adair, Wilma			916-555-8124 281-653-3805		Adair, Justin
Adair, Wilma	✓		(916) 288-1608 1-555-555-8124 123-123-2344	Testeam18577@email.com	Adair, Brandon Babb, Judy H
Adams, Barbara			1-555-555-3273		Adams, Julie

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# CONTACT VIEW - STUDENTS

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

adair 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
Adair, Brandon	3	12	2001-12-12		

Cancel OK \* [?]

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# CONTACT VIEW - STUDENTS

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								<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AGHS1	Adams, Corby	Uncle								<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Details: Adair, Brandon 3

Relationship: [Dropdown]  
 Start Date: [MM/DD/YYYY]  
 End Date: [MM/DD/YYYY]  
 Has Custody  
 Lives With  
 School Pickup  
 Emergency Contact  
 Receives Mail  
 Overwrite BrightStrobe Filter - Use for Messaging  
 Notes: [Text Area]  
 Original Contact Type: [Dropdown]

Details: Adair, Brandon 3

Can Access Student Data And Email?  
 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

Lists historical Contact info

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

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# CONTACT VIEW – PHONE NUMBERS

Phone Numbers

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

Add Phone

Type: [Dropdown]  
 Phone Number: [Text Field]  
 Extension: [Text Field]  
 (accepts text messaging)  
 Preferred

Edit Phone

Type: [Mobile]  
 Phone Number: [208-888-6666]  
 Extension: [Text Field]  
 (Accepts text messaging)  
 Preferred

Prioritize order of phone numbers

Set preferred #

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# CONTACT VIEW – EMAIL ADDRESSES

▼ Email Addresses

Primary	Type	Email Address	Action
<input checked="" type="checkbox"/>	Current	ash@email.com	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Additional	HappyDay@gmail.com	<input type="checkbox"/> <input type="checkbox"/>

[Add Email](#)

**Add Email Address**

Type:

Email Address:

Primary:

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# CONTACT VIEW – ADDRESSES

▼ Addresses

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

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

**Add Address**

Type:

Address Line 1:

Address Line 2:

Unit:

City:

Country:

State/Province:

Postal Code:

Start Date:

End Date:

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# STUDENTVIEW - CONTACTS

## Contacts

Kerbs, Michael 10 1040 AGHS1

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 Male (M)

Grade Level 10

Graduation Year

Guardianship

Guardian Email momanddad@PSSIS.com

Mother (last, first) Kerbs, Lindsay

Mother's Day Phone 1-555-555-9138

Mother's Employer Haight College

Mother's Home Phone 1-555-555-8633

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					<input checked="" type="checkbox"/>	Emergency 1				
	No Name:226479			1-555-555-2607					<input checked="" type="checkbox"/>	Emergency 2				

**Guardian Email**

Guardian's Email Address:

Contact #1

Contact Name (Last, First)

Phone

Relationship

Phone Type

Contact #2

Contact Name (Last, First)

Phone

Relationship

Phone Type

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## STUDENT CONTACTS DATA CONSIDERATIONS

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## CONSIDERATIONS/COMPLICATIONS

- Backup your data!
- Before starting, create an export file of Legacy Contact Data (mandatory). Fields should include:
 

▪ Student_number	▪ Guardian_LN	▪ Emerg_Contact_3
▪ Lastfirst	▪ Guardian_FN	▪ Emerg_3_rel
▪ Grade_level	▪ Guardianemail	▪ Emerg_3_Phone
▪ schoolid	▪ Emerg_Contact_1	▪ Emerg_3_ptype
▪ Mother	▪ Emerg_1_rel	
▪ Mother_home_phone	▪ Emerg_Phone_1	
▪ Motherdayphone	▪ Emerg_1_ptype	
▪ Mother_employer	▪ Emerg_Contact_2	
▪ Father	▪ Emerg_2_rel	
▪ Father_home_phone	▪ Emerg_Phone_2	
▪ Fatherdayphone	▪ Emerg_2_ptype	
▪ Father_employer		
- 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.

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## CONSIDERATIONS/COMPLICATIONS

- 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).
  - 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 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.
  - E. Overlapping Original Contact Types
    - A. 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.
    - B. During the consolidation process you will need to remove the duplicate role.
    - C. Once removed that data will no longer exist in the Legacy fields.
    - D. For example, 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.

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## CONSIDERATIONS/COMPLICATIONS

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

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## PSCB CUSTOM REPORTS

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## PSCB CUSTOM REPORTS

- There are resources available in PSCB Custom Reports to help you navigate contacts.
  - You **must** make your student selection first.
- Start Page > PSCB Custom Reports > Contacts

### 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/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.

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## STUDENT CONTACTS MANUAL CONSOLIDATION

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# CONTACTS MIGRATION INFORMATION/EXPECTATIONS

- Your school will need to determine the best way to review and update contact information for your parents.
- You may have to choose multiple contacts within your school to assist with this project.
- You will need to be sure that you have the most current information on your student Contacts to include telephone numbers, email addresses, relationships, etc.
- The district recommendation is that you work through this process at a rate of 25-percent of your student population per month through April.
- There will be two Epi-Center submissions required. One March 1, 2023, certifying that at least 50-percent of your Student Contacts have been updated in PowerSchool. The second submission will be on May 1, 2023, and will be to certify that you have completed your Contacts Migration at 100-percent.
- Cantey and the District will assist with any questions that may arise as a part of the migration process. The actual migration process will be a school level responsibility.

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# SEARCH FOR DUPLICATES

1. Be sure that the Duplicate Contact is the same contact for your student. This can be done by reviewing Street Address, Phone Number, etc. for the Contact for similarities.
2. Contacts can be associated with multiple schools and multiple students.
3. When you are certain that the Contacts are the same individual, choose Select By Hand.

Search results (509)

Contact	Access Account	Street Address	Phone Number	Email Address	Associated Student(s)
Abplansip, Macy			281-653-5550 281-653-6890		Kerbs, Adam 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, Wilma			1-555-555-8124 1-555-555-9027		Adair, Brandon
Adair, Wilma			916-555-8124 281-653-3605		Adair, Brandon
Adair, Wilma			916-555-8124 281-653-3605		Adair, Justin
Adair, Wilma			916-555-8124 281-653-3605		Adair, Brandon

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Select By Hand

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## SELECT RECORDS TO MERGE

- Once you have clicked Select By Hand, choose the checkbox by the duplicate Contact records.
- Remember to verify that these are the same contact before you Consolidate. Your changes to contacts may affect other schools if they have students associated with the contact you are making changes to.

<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

- Modify any incorrect data prior to consolidating. This is where accurate and updated records become important. You must know which set of contact information is correct in order to be able to choose the Master Account.
- Choose which account will be the Master Account and whether a record should be excluded.
- The Consolidate All Data will be used 99% of the time.

**Consolidate Contacts**  
Hide Main Menu

Master 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)

Modify any "bad" data prior to consolidating!

Consolidate All Data  Keep Master Only

Master	Exclude	Access Account
<input checked="" type="radio"/>	<input type="checkbox"/>	
<input type="radio"/>	<input type="checkbox"/>	
<input type="radio"/>	<input type="checkbox"/>	

Used 99% of the time

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# CONSOLIDATE THE RECORDS

1. You will receive a message to Confirm Consolidation.
2. Please read the information contained within the message before you click ok.

Consolidated Contact

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

School	Name	Relationship	Created	Linked with	Original Contact	Original Contact Type	Start Date	End Date	Web Access	Action
ADHS1	Adam Brandon	Father				Father				[X] [Y]
Orchard School	Adam Brandon	Father				Father				[X] [Y]
Orchard School	Adam Brandon	Father				Father				[X] [Y]
SCMS	Adam Justin	Father				Father				[X] [Y]

Adam, Adam	945-555-1014 979-555-1014	Adam, Brandon Adam, Brandon Adam, Brandon Adam, Justin
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# MERGED RECORDS – THE FINISHED PRODUCT

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, 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](#)

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## STUDENT CONTACT KNOWLEDGE BASE 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: Original Contact Name Changes in Custom Pages - KB# 79792**

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## OVERVIEW - BACKUP, MIGRATION AND CONSOLIDATION

1. **Back up your data!** It will be easy to inadvertently delete data in this process. It is required that you first create a back up of your (legacy) contact data. You can easily use Quick Export for this process. From the PS Start Page make all students your Current Selection. Click on Importing & Exporting and then Quick Export. Copy and Paste the field names (slide 17) into your field text box (make sure there are no spaces after each field name) and submit. Save this Export.
2. **Migration: Verify all students have Contacts on the PS Contacts page.**
  - Because there is no way to search fields on the Contacts page, manually check each student one by one.
  - If needed, ask your School Team for Help and consider breaking down students into manageable groups (by grade level or last name, etc).
  - In this step, you can choose to clear up glaring errors that are on the PS Contacts page (ex: step-mother listed as Mother or Father listed as Mother, etc).
3. **Consolidation Part 1: Run Reports for Duplicate Contacts.** *PS Start Page > PSCB Custom Reports > Contacts > Contacts – Duplicates.*
  - This report is run based on a current selection. Create a (manageable) student selection or clear your selection to run the report for all student contacts.
  - Duplicate contact name, when clicked, take you to the Consolidate Contacts page.
  - In this step you can choose to clear up Duplicate Contact Records via the Consolidate Contacts page.
4. **Consolidation Part 2: Select Contacts by Hand.** *PS Start Page > Contacts > Last Name > First Name > Select by Hand.*
  - Two functions appear in the Contacts Function Dropdown: Edit Contacts and Consolidate Contacts.
  - Edit Contacts allows you to edit the values for two specific fields: Access Account Status and Contact Status. The Editable values include Active and Inactive.
  - Consolidate Contacts allows you to consolidate contact data from multiple or duplicate contacts into one Master Contact.

[SCPCSD PowerSchool Contacts: Backup, Migration, and Consolidation Documentation](#)

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# QUESTIONS

[HELP@CANTEYTECH.COM](mailto:HELP@CANTEYTECH.COM)