

SCPCSD PowerSchool Contacts: Backup, Migration, and Consolidation

PowerSchool 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. Contacts, also referred to as Unlimited Contacts and PowerSchool Core Contacts, are located on the Student Navigation Menu as Contacts.

Frequently Asked Questions

1. **Must schools continue to populate SC Contacts?** Yes. This requirement may change in the future, but for now, no guidance has been issued stating otherwise. SC Contacts Page (Bottom) remains required for Enrich.
2. **Will Level Data help with this process?** Hopefully, however, the district has been in communication with the SCDE and has been given no definitive answer on whether additional assistance will be provided and when. At this time, we have no guarantee that there will be any additional assistance provided by the SCDE and Level Data. Currently, there are two Level Data tabs for Contacts. No guidance has been provided on these new tabs and we are not yet encouraging schools to use them.
3. **Can data be lost in the process of migrating and consolidating?** Yes. Data modified on the Contacts page can overwrite or delete contact data linked to other pages. Pay close attention to the original contact type.
4. **Are there field names for the contacts on the Contacts Page?** No. Currently there are no field names DIRECTLY associated with the data on the Contacts page. All data appearing on the contacts page is either Added DIRECTLY to the contacts page or is pulled into the Contacts page from the Demographics page or the Emergency Contacts page.

Recommended Steps for the Contacts Process

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 below field names into your field text box (make sure there are no spaces after each field name) and submit. Save this Export.
 - 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

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.