

PowerSchool Student Contact Screens

Working With PowerSchool Student Contacts

This is an overview of the Student Contact screens new in PowerSchool 12.

Contacts have been significantly improved in PowerSchool 12 to allow for unlimited contacts for students and the ability to collect more information about the student contacts.

There are two new places in which the contact can be viewed – Student Contact Screens and through the Contacts tab.

Viewing Contact Information for a Student

- 1) Select a student.
- 2) Choose the **Contacts** screen from the left navigation menu.

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	Alice Nelson <underpaid.maid@gmail.com>	Other	Home	555-602-1974	422 Clinton Way Jackson, MS 39209			✓	✓	Emergency 1				✎ -
2	Sam Franklin <sam@thebutcherman.com>	Other	Work	555-610-3000	615 Main Street Jackson, MS 39209				✓	Emergency 2				✎ -
3	Carol Brady <carole.brady@fake.email>	Mother	Home	555-602-1974	422 Clinton Way Jackson, MS 39209	✓	✓	✓		Mother	6/10/2015			✎ -
4	Mike Brady <mike.brady@fake.email>	Father	Daytime	555-602-1900	422 Clinton Way Jackson, MS 39209	✓	✓	✓		Father				✎ -

The student's contacts will be appear in the Contact Order.

To adjust the contact order, click on the up and/or down arrows to the left of the contact(s).

Order	Name / Email	Relationship
1	Alice Nelson <underpaid.maid@gmail.com>	Other
2	Sam Franklin <sam@thebutcherman.com>	Other
3	Carol Brady <carole.brady@fake.email>	Mother
4	Mike Brady <mike.brady@fake.email>	Father

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- 4) If there is a Start and/or End date to the relationship with the student, this may be entered (This is useful in retaining temporary custody information or in the case of Exchange students, etc.).
- 5) Check the appropriate boxes for the permissions the contact has with the student:
 - a. Has Custody
 - b. Lives With
 - c. School Pickup
 - d. Emergency Contact
 - e. Receives Mail
- 6) Provide any notes if necessary.
- 7) If desired, select an Original Contact Type.

NOTE: This is provided as backward compatibility for PowerSchool. Connect recommends that if you are using only the new Unlimited Contacts that the Original Contact Type be left blank to avoid confusion and invalid data being viewed in various portals in the PowerSchool system.

All Tab

Historical relationship information can be added and viewed on the **All** tab at the top of the “suitcase”. Click the **Add Details** button to add historical relationship information.

The image shows two screenshots of the PowerSchool Student Contact Screens. The left screenshot shows a relationship detail form for a relationship starting on 3/7/2019 with no end date. The relationship type is 'Other'. The permissions checked are 'Lives With', 'Emergency Contact', and 'Receives Mail'. The notes field contains 'Alice's boyfriend'. The right screenshot shows a relationship detail form for a relationship starting on 1/1/2019 and ending on 3/6/2019. The relationship type is 'Neighbor'. The permissions checked are 'Emergency Contact' and 'Receives Mail'. The notes field contains 'Alice's friend'. Both forms have a 'Delete' button and a 'Notes' field. A red box highlights the '1/1/2019 - 3/6/2019' date range in the left screenshot.

Data Access Tab

If the contact has the Data Access box checked, the **Data Access** tab will be available. This tab contains the information about the type of Email Notifications the contact will receive, the frequency, and any additional email addresses to which the Email Notifications are sent.

If the Data Access box is not checked, this must be added through the Contact's Edit Details function.

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Edit Demographic Info for a Student's Contact

You may edit information about the student's contact from the Student's Contacts screen. Clicking on the name of the contact will take you to the Contact Details screen.

The Contact Details screen includes:

- Demographics
- Parent/Student Portal Web Account Information
- Students who have a relationship to the contact
- Phone Numbers
- Email Addresses
- Addresses

Demographics

This information includes name, gender and employer information, as well as the location where the contact can be set to Active or Inactive. If a contact is no longer associated with any student in the district, the Active box can be unchecked and the contact will not appear in any Active contact searches.

Web Account Access

This replaced the old Access Account information for the Parent Access account. You may use this to:

- If there is no account, click the Add Account button to add a new parent access account for this contact;

The screenshot shows a modal window titled "Add Web Account Access". The form includes the following fields and controls:

- Account Enabled:** A checkbox that is currently checked.
- Username:** A text input field containing "sambutcherman".
- New Password:** A text input field with masked characters (dots).
- Confirm Password:** A text input field with masked characters (dots).
- Account Email:** A text input field containing "sam@thebutcherman.c" and a dropdown menu labeled "Select existing email".
- Buttons:** "Cancel" and "Submit" buttons are located at the bottom right of the form.

- If there is an account, click on the **edit icon** to:
 - Enable or Disable the individual contact's parent access account;
 - Reset the parent access account's password to a temporary password; or
 - Update the email address associated with the parent access account.

NOTE 1: If there is a Web Access Account, it will be the account used to access information about each of the students in the Students section for whom the "Data Access" check is displayed.

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NOTE 2: There can only be a single Web Access Account per Contact. Parents who have created multiple Web Access Accounts for one or more children will need to be consolidated or they will show up as multiple contacts. See your PowerSchool Project Manager for assistance in consolidating accounts.

Students

This will display all students in the district that have a relationship with this contact.

The **Edit Icon** to the right of each student can be used to adjust the relationship information with the selected student.

Active All

Relationship Other

Start Date 3/6/2019

End Date MM/DD/YYYY

Has Custody

Lives With

School Pickup

Emergency Contact

Receives Mail

Notes

Alice's boyfriend

Approximately 3982 characters left

Original Contact Type

Cancel Submit

Clicking on a student name will take you to that student's Contacts screen, where all contacts for the student can be viewed.

Phone Numbers

All phone numbers will be listed for the contact. They can be sorted using the order buttons to the left of the phone number.

The **Edit Icon** to the right of each phone number can be used to adjust the existing phone number information, including the Type, Phone Number and Extension, and to mark the phone number as one that can receive SMS (text) messages or if it is the preferred phone number.

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Edit Phone

Type: Work

Phone Number: 555-610-3000 *

Extension:

SMS: (Accepts text messaging)

Preferred:

Cancel Submit

Click the **Add Phone** button to add new phone numbers.

Email Addresses

All Email Addresses available for the contact will be listed here.

The **Edit Icon** to the right of each email address can be used to adjust the existing email address.

Edit Email Address

Type: Current

Email: sam@thebutcherman.c *

Primary:

Cancel Submit

To add an email address, click on the **Add Email** button.

NOTE: If the email is identified as **Primary**, it cannot be deleted.

Addresses

All Addresses associated with the contact will be listed here. There is the ability to provide start and end dates on addresses to track address changes.

The **Edit Icon** to the right of the address can be used to adjust the existing email address.

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Edit Address [X]

Type: Mailing

Address Line 1: 615 Main Street

Address Line 2: [Empty]

Unit: [Empty]

City: Jackson

Country: United States (US)

State/Province: Mississippi (MS)

Postal Code: 39209

Start Date: MM/DD/YYYY [Calendar Icon]

End Date: MM/DD/YYYY [Calendar Icon]

Cancel Submit

To add an address, click on the **Add Address** button.

NOTE: If the contact is marked as Lives With for a student, the addresses are **not** linked to any of the student addresses at this time. If the student address changes, each contact marked as Lives With will need to have their address manually changed.

Adding Brand New Contacts

If there is not a contact listed for a student, you may choose to click the **Add** button on the individual student's Contacts screen.

This will launch the **Add Contacts** screen, which will provide an initial search.

Add Contacts [X]

First Name: [Text Box] Last Name: [Text Box]

Street Address: [Text Box] Unit: [Text Box]

Phone Number: [Text Box] Extension: [Text Box]

Email Address: [Text Box]

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 [Search]

Search results (0)

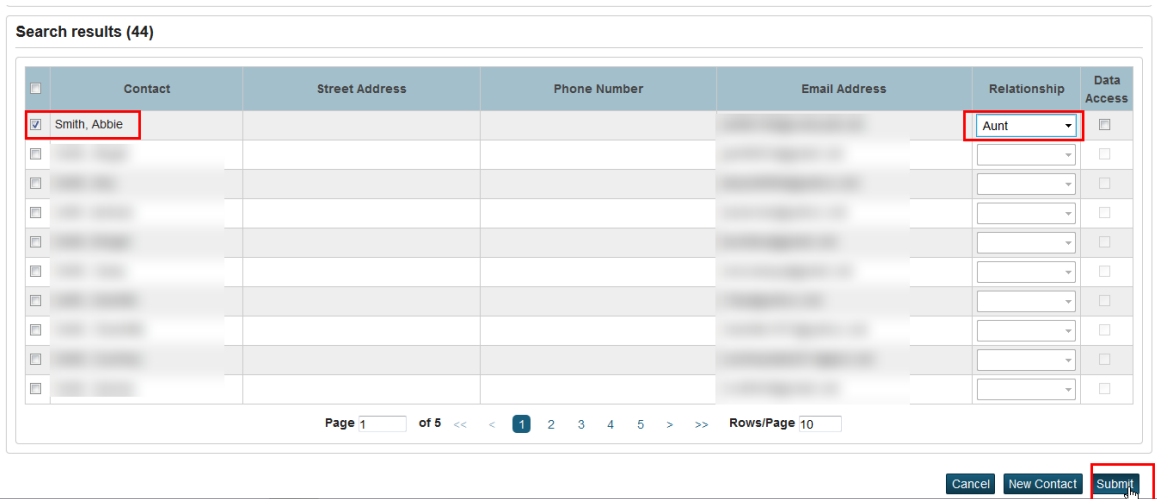
No Contacts match your entry.

Cancel New Contact Submit

You should **ALWAYS** search for the Contact first. When searching for the contact, check the box to **Include Inactive** contacts and uncheck the box so that you are not showing only access accounts.

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If a matching contact is found, check the box to the left of the contact, choose a relationship and click the Submit button at the bottom of the screen.

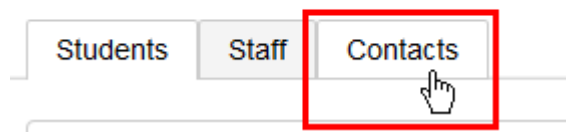


If no matching contact can be found, click on the **New Contact** button. The Create Contact screen will appear and will automatically include the student. Fill out all pertinent information and click **Submit** at the bottom of the screen.

Searching from the Contacts tab

You may search for contacts from the Start Page using the **Contacts** tab.

Start Page



This will be similar to the search options when searching for contacts in the system when adding a new contact.

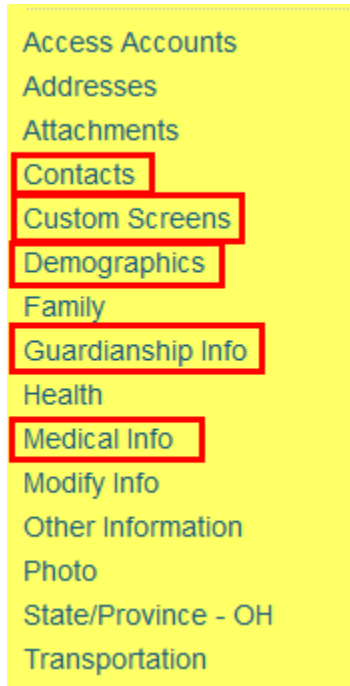
NOTE: The contact search screen defaults to **Only Show Access Accounts**. To search for all active contacts, uncheck this box. If you need to search for contacts that may have also been de-activated, then check the box to **Include Active**.

Additional Customizations

As part of Connect's customizations available to avoid confusion the Student Screens will be changed.

When viewing a student, the following menu items will be included or modified in the left navigation pane (**NOTE:** Your list may look different depending upon your permissions.):

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Contacts: This will be the only location where any student contact information will reside. All Parent and Emergency Contact information will be maintained here for the student. An additional customization at a later date will add the Student Address to this screen.

Custom Screens: These will no longer contain any custom contact, demographic, guardian, emergency or medical information screens.

Demographics: All parent and guardian information will be removed from this screen, and it will only include Student Demographic information.

Guardianship Info: This screen will contain the Guardian Alert and other pertinent Guardianship, custody and living arrangement notes.

Medical Info: This screen will contain the Medical Alert and any information regarding Doctors, Dentists, Emergency Room, Allergy info, etc.

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Getting Contact Data Out of PowerSchool

Connect Reports

Connect has created several reports that used the old contact info. We are in the process of updating these. As of the date of this document, these are some of the reports that Connect has made available.

- Select Students > Print Reports > **Connect - Emerg Med Card (PS 12 Contacts)**
- Select Students > Export Using Template > Students > **Student Contact Data (PS12)**
- sqlReports > Contacts
 - **Student Contact List (PS12)**
 - **Students with No Contacts (PS12)**
 - **Students with No Phone Contacts (PS12)**

Quick Exports and List Students Contact DAT Builder

Due to the change in the way that contacts are stored, regular fieldnames are not able to be used for contact data. You will need to use the Contact Data Access Tag (DAT). We have added a plugin that will build the DAT for you for a specific contact when using the Quick Export or List Student functions.

Enter any Student Fieldnames that you want to include in the export or the list. For example:

^[39]Abbreviation)
Student_Number
LastFirst
Grade_Level

Then, use the Contact DATs link to choose various contact data, by choosing either the Relationship or the Contact Order and then the contact information you wish to export.

Select a Relationship or Order then select a DAT. It will function as a single field for the Quick Export.

RELATIONSHIP: Mother	-OR- ORDER: --	
1. address_whole	7. lastname	13. phone3_type
2. city	8. phone1	14. relationship
3. email	9. phone2	15. state
4. firstname	10. phone3	16. street
5. lastfirst	11. phone1_type	17. unit
6. line2	12. phone2_type	18. zip

For more advanced contact data or additional options, use the DAT generator [HERE](#). Cancel

NOTE: The Quick Export function will not be able to translate the column header of the Contact DAT, so you will need to update the header column. Using the List Students function will maintain column headers.