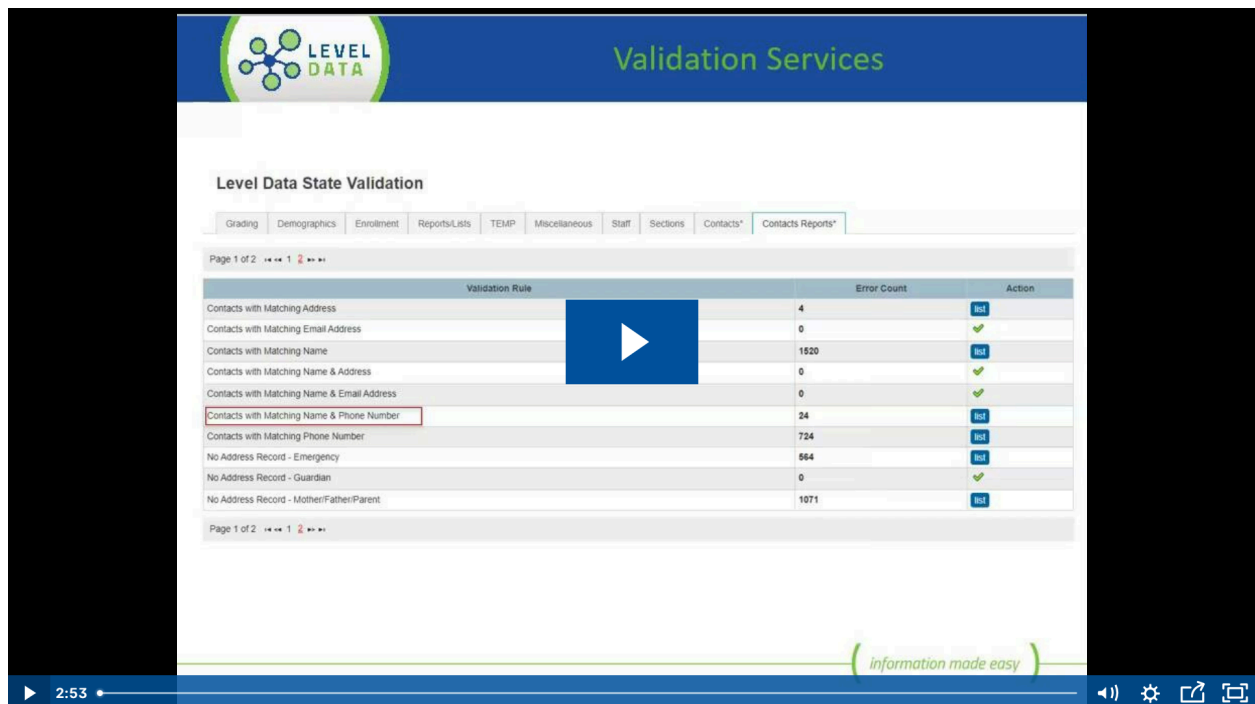


How to Easily Manage Unlimited Contacts in PowerSchool

Contact data from the original core contact fields in PowerSchool were automatically migrated to the new contacts structure in PowerSchool 11.1. Contact data was migrated for all students that have ever existed within a PowerSchool database - both active and inactive.

The State Data Validation Suite (SDVS) generic contacts rules consist of 16 rules on a “Contacts” tab and 23 rules on a “Contacts Reports” tab. These rules are provided to help users clean up existing and/or new contact data.



The screenshot displays the 'Level Data State Validation' interface. At the top, there is a blue header with the 'LEVEL DATA' logo and the text 'Validation Services'. Below the header, a navigation bar includes tabs for 'Grading', 'Demographics', 'Enrollment', 'Reports/Lists', 'TEMP', 'Miscellaneous', 'Staff', 'Sections', 'Contacts*', and 'Contacts Reports*'. The 'Contacts*' tab is currently selected. The main content area shows a table with the following columns: 'Validation Rule', 'Error Count', and 'Action'. The table lists 16 validation rules, with the 'Contacts with Matching Name & Phone Number' rule highlighted in red. A large blue play button is overlaid on the table. The interface also includes pagination controls and a footer with the text '(information made easy)'.

Validation Rule	Error Count	Action
Contacts with Matching Address	4	test
Contacts with Matching Email Address	0	✓
Contacts with Matching Name	1920	test
Contacts with Matching Name & Address	0	✓
Contacts with Matching Name & Email Address	0	✓
Contacts with Matching Name & Phone Number	24	test
Contacts with Matching Phone Number	724	test
No Address Record - Emergency	564	test
No Address Record - Guardian	0	✓
No Address Record - Mother/Father/Parent	1071	test

The rules on the Contacts tab identify both erroneous existing data and important or required missing data.

Rules on the Contacts Reports tab are additional helper rules that identify additional missing contact data - data a district may or may not require a contact to have.

This tab also includes 10 rules to help with the merging and consolidation of contacts.

Note: A description of each of these rules is included at the end of this article for reference.

It is important to keep in mind that since contact requirements vary from district to district, depending on the district needs and policies, it is possible that some rules may never get to the “0” and green check mark.

A district should strive to clean up as much data as possible per their district policy to attempt to get the error count as low as possible. All 0s and green check marks will most likely not be possible for some of the rules on the Contacts Reports tab.

Level Data State Validation

Validation Rule	Error Count	Action
Contacts Without Contact Information (No Address, No Email, and No Phone)	15	list
Contacts Without a Name ("No Name" Contact Records)	1218	list
Contacts Without a Phone Record	15	list
Existing Address Record - Missing City	0	✓
Existing Address Record - Missing Country	0	✓
Existing Address Record - Missing Postal Code	0	✓
Existing Address Record - Missing State/Province	0	✓
Existing Address Record - Missing Street	0	✓
Existing Address Record - Missing Type	0	✓
Existing Email Record - Missing Type	0	✓

It is worth mentioning that the generic set of contacts rules mainly focuses on contacts tied to students that are currently active in the system - except for specific cases which are listed in the rule descriptions.

Contacts tied only to students that are inactive in the database are not top priority to correct and therefore are ignored.

In order to eliminate unnecessary data entry, it is recommended that districts, schools, and users use the suggested workflow outlined below to clean up any contact data existing in the system.

This workflow should be used throughout the year to keep contact data clean and ensure that duplicate contact records do not exist in the system.

Suggested Workflow

Below is the suggested order in which a user should go through rules to correct contact data issues. By following this workflow a user should be able to eliminate some unnecessary data entry.

1. **Make sure all students have at least one contact associated and any existing contacts have at least one student associated. Delete any erroneous contacts:**
 - a. Contacts > Students with No Associated Contacts
 - b. Contacts > Contacts with No Associated Students
2. Merge any contact records that should be combined:
 - a. Contacts Reports > Contacts with Matching Name & Phone Number
 - b. Contacts Reports > Contacts with Matching Name & Address (Street & Unit)
 - c. Contacts Reports > Contacts with Matching Name & Address (Street Only)
 - d. Contacts Reports > Contacts with Matching Name & Email
 - e. Contacts Reports > Contacts with Matching Phone Number
 - f. Contacts Reports > Contacts with Matching Address (Street & Unit)
 - g. Contacts Reports > Contacts with Matching Address (Street Only)
 - h. Contacts Reports > Contacts with Matching Email
 - i. Contacts Reports > Contacts with Matching Email Address and Web Access Account Email
 - j. Contacts Reports > Contacts with Matching Name
3. Correct any contact records that are missing important data or have invalid data for existing methods of contact:
 - a. Contacts > Existing Address Record - Missing/Invalid Data
 - b. Contacts > Existing Email Record - Missing/Invalid Data
 - c. Contacts > Existing Phone Record - Missing/Invalid Data
 - d. Contacts > No Address Record - Contacts Marked to Receive Mail - Step 1
 - e. Contacts > No Address Record - Contacts Marked to Receive Mail - Step 2
4. Add missing important information to contact records:
 - a. Contacts > Missing Contact First Name
 - b. Contacts > Missing/Invalid Contact Relationship to Student
 - c. Contacts > Contacts Without a Phone Record
 - d. Contacts > Contacts Without Contact Information (No Address, No Email, No Phone)
5. Go back through step 2 and merge any records that should be merged since data additions.
6. Collect any additional information the district/school requires:

- a. Contacts Reports > No Address Record – Emergency
 - b. Contacts Reports > No Address Record – Guardian
 - c. Contacts Reports > No Address Record - Mother/Father/Parent
 - d. Contacts Reports > No Email Record – Emergency
 - e. Contacts Reports > No Email Record – Guardian
 - f. Contacts Reports > No Email Record - Mother/Father/Parent
 - g. Contacts Reports > Students with No Contacts Marked as Lives With or Has Custody
 - h. Contacts Reports > Students with No Contacts Marked as Lives With
 - i. Contacts Reports > Students with No Contacts Marked as Has Custody
 - j. Contacts Reports > No Web Access Account - Contacts Marked as Has Custody
 - k. Contacts Reports > No Web Access Account - Contacts Marked as Has Custody with Unshared Email Account
 - l. Contacts Reports > Web Access Account Email Address Different from Primary Email Address
7. Go back through steps 2, 3, 4, and 5.
 8. Clean up “No Name” contact records by either adding missing information or deleting the record - if that is the determination after review:
 - a. Contacts > No Name Contacts Not Associated to Any Students
 - b. Contacts > Contacts Without a Name (“No Name” Contact Records)
 9. Go back through steps 2, 3, 4, and 5.
 10. Inactivate contacts that are associated to only inactive students.
 - a. Contacts > Active Contacts Associated to Only Inactive Students
 11. Activate or provide an end date for inactive contacts that are associated with active students.
 - a. Contacts > Inactive Contacts Associated with Active Students
 12. Repeat and review throughout the school year as necessary.

Rules and Descriptions

Listed below are the rules contained on each tab along with a description of what the rule’s purpose is and the data the rule returns.

Contacts

Active Contacts Associated to Only Inactive Students

All active contacts that are associated to inactive students only. This rule excludes “No Name” contact records.

Contacts Without Contact Information (No Address, No Email, and No Phone)

All contact records tied to active students that have no method of contact. No active address, no email, and no phone record exists for the contact.

Contacts Without a Name ("No Name" Contact Records)

All "No Name" contact records tied to active students. These records were created from the auto-migration process that occurred in PowerSchool 11.1. These records will typically only contain the email address that was in the Guardian's Email Address field on the Parents page.

Contacts Without a Phone Record

All contact records tied to active students that have no phone record. This rule excludes "No Name" contact records.

Contacts with Data Access to Ended Student Associations

All contacts where their association to a student has ended, but the contact still has data access to the student.

Contacts with No Associated Students

All active or inactive contact records that are not associated with any active or inactive students within the system.

Existing Address Record - Missing/Invalid Data

All contact records tied to active students that have an existing address record, but something within the address is not correct. (Ex: Leading/Trailing whitespace, missing values, invalid values). This rule excludes "No Name" contact records.

Existing Email Record - Missing/Invalid Data

All contact records tied to active students that have an existing email record, but something within the email address record is not correct. (Ex: Leading/Trailing whitespace, missing values, invalid values). This rule excludes "No Name" contact records.

Existing Phone Record - Missing/Invalid Data

All contact records tied to active students that have an existing phone record, but something within the phone record is not correct. (Ex: Leading/Trailing whitespace, missing values, invalid values). This rule excludes "No Name" contact records.

Inactive Contacts Associated with Active Students

All inactive contacts that are associated to at least one active student. This rule excludes "No Name" contact records.

Missing Contact First Name

All contact records tied to active students that are missing a value in the First Name field. This rule excludes "No Name" contact records.

Missing/Invalid Contact Relationship to Student

All contact records tied to active students that have a missing or invalid value in the Relationship field. This rule excludes “No Name” contact records.

No Address Record - Contacts Marked to Receive Mail - Step 1

All contacts where the Receives Mail flag is checked, but there is no address record and the determination is that an Address should be created. This rule excludes “No Name” contact records.

No Address Record - Contacts Marked to Receive Mail - Step 2

All contacts where the Receives Mail flag is checked, but there is no address record and the determination is that the Receives Mail flag should be unchecked. This rule excludes “No Name” contact records.

No Name Contacts Not Associated to Any Students

All “No Name” contact records that are not associated to any student (active or inactive).

Students with No Associated Contacts

All active students that have no associated active contact, therefore the student has no contacts.

Contacts Reports

Contacts with Matching Address (Street & Unit)

All contact records grouped together based on a matching value in the Address Line 1 and Unit fields. At least one of the contact records must be tied to an active student in order for any matches to appear and only records that have a value entered in the Unit field are returned. This rule excludes “No Name” contact records.

Contacts with Matching Address (Street Only)

All contact records grouped together based on a matching value in the Address Line 1 field. At least one of the contact records must be tied to an active student in order for any matches to appear. This rule excludes “No Name” contact records.

Contacts with Matching Email Address

All contact records grouped together based on a matching value in the Email Address field. At least one of the contact records must be tied to an active student in order for any matches to appear. This rule excludes “No Name” contact records.

Contacts with Matching Email Address and Web Access Account Email

All contact records grouped together based on matching Email Address and Web Access Account Email. At least one of the contact records must be tied to an active

student in order for any matches to appear. This rule excludes "No Name" contact records.

Contacts with Matching Name

All contact records grouped together based on a matching First Name and Last Name. At least one of the contact records must be tied to an active student in order for any matches to appear. This rule excludes "No Name" contact records.

Note: It is recommended that a district user clean up and merge contact records by means of the other "Contacts with Matching..." rules before using this rule as resolving issues with those rules will greatly reduce the number of records returned in this rule.

Contacts with Matching Name & Address (Street & Unit)

All contact records grouped together based on a matching value in the Address Line 1 and Unit fields and a matching First and Last Name. At least one of the contact records must be tied to an active student in order for any matches to appear and only records that have a value entered in the Unit field are returned. This rule excludes "No Name" contact records.

Contacts with Matching Name & Address (Street Only)

All contact records grouped together based on a matching value in the Address Line 1 field and a matching First and Last Name. At least one of the contact records must be tied to an active student in order for any matches to appear. This rule excludes "No Name" contact records.

Contacts with Matching Name & Email Address

All contact records grouped together based on a matching value in the Email Address field and a matching First and Last Name. At least one of the contact records must be tied to an active student in order for any matches to appear. This rule excludes "No Name" contact records.

Contacts with Matching Name & Phone Number

All contact records grouped together based on a matching value in the Phone Number field and a matching First and Last Name. At least one of the contact records must be tied to an active student in order for any matches to appear. This rule excludes "No Name" contact records.

Contacts with Matching Phone Number

All contact records grouped together based on a matching value in the Phone Number field. At least one of the contact records must be tied to an active student in order for any matches to appear. This rule excludes "No Name" contact records.

No Address Record – Emergency

All “Emergency” contact records tied to active students that have no active address record. This rule excludes “No Name” contact records.

Records that are considered an “Emergency” contact for the purpose of this rule are defined as:

- Contacts with an Original Contact Type of “Emergency 1”, “Emergency 2”, or “Emergency 3”.
- Contacts that have a Relationship with the word “Emergency” in either the Code or Display Value.
- Contacts that have the “Emergency Contact” checkbox checked on the contact record.

No Address Record – Guardian

All “Guardian” contact records tied to active students that have no active address record. This rule excludes “No Name” contact records.

Records that are considered a “Guardian” contact for the purpose of this rule are defined as:

- Contacts with an Original
 - Contact Type of “Guardian”.
- Contacts that have a Relationship with the word “Guardian” in either the Code or Display Value.

No Address Record - Mother/Father/Parent

All “Mother/Father/Parent” contact records tied to active students that have no active address record. This rule excludes “No Name” contact records.

Records that are considered a “Mother/Father/Parent” contact for the purpose of this rule are defined as:

- Contacts with an Original Contact Type of “Mother” or “Father”.
- Contacts that have a Relationship with the word “Mother”, “Father”, or “Parent” in either the Code or Display Value.

Note: This rule ignores any Relationship with the word “Grand” somewhere in either the Code or Display Value.

No Email Record - Emergency

All “Emergency” contact records tied to active students that have no email record. This rule excludes “No Name” contact records.

Records that are considered an “Emergency” contact for the purpose of this rule are defined as:

- Contacts with an Original Contact Type of “Emergency 1”, “Emergency 2”, or “Emergency 3”.
- Contacts that have a Relationship with the word “Emergency” in either the Code or Display Value.
- Contacts that have the “Emergency Contact” checkbox checked on the contact record.

No Email Record - Guardian

All “Guardian” contact records tied to active students that have no email record. This rule excludes “No Name” contact records.

Records that are considered a “Guardian” contact for the purpose of this rule are defined as:

- Contacts with an Original
- Contact Type of “Guardian”.
Contacts that have a Relationship with the word “Guardian” in either the Code or Display Value.

No Email Record - Mother/Father/Parent

All “Mother/Father/Parent” contact records tied to active students that have no email record. This rule excludes “No Name” contact records.

Records that are considered a “Mother/Father/Parent” contact for the purpose of this rule are defined as:

- Contacts with an Original Contact Type of “Mother” or “Father”.
- Contacts that have a Relationship with the word “Mother”, “Father”, or “Parent” in either the Code or Display Value.

Note: This rule ignores any Relationship with the word “Grand” somewhere in either the Code or Display Value.

No Web Access Account - Contacts Marked as Has Custody

Listing of contacts that have the Has Custody checkbox checked, but no Web Access Account exists.

No Web Access Account - Contacts Marked as Has Custody with Unshared Email Account

Listing of contacts that have the Has Custody checkbox checked, but no Web Access Account exists. This rule specifically only lists contacts that do not share an email with another contact that already has a Web Access Account.

Student-Contact Relationship Notes

Listing of contact notes that exist for a contact’s relationship to a student.

Students with No Contacts Marked as Has Custody

All students where none of their associated contacts have the Has Custody checkbox checked. This rule only checks against active associated contacts.

Students with No Contacts Marked as Lives With

All students where none of their associated contacts have the Lives With checkbox checked. This rule only checks against active associated contacts.

Students with No Contacts Marked as Lives With or Has Custody

All students where none of their associated contacts have the Lives With or Has Custody checkbox checked. This rule only checks against active associated contacts.

Web Access Account Email Address Different from Primary Email Address

Listing of contacts where the Web Access Account Email Address is different from the Primary Email Address