



SchoolEngage



SchoolEngage Unlimited Contacts

May 1st, 2020

Presentation Agenda

1. What are Unlimited Contacts?
2. Contact Data in SchoolEngage Forms
3. Writing Back Contacts
4. Matching Contact Records
5. Data Access Accounts
6. Processing Records
7. Feedback and Questions?

Unlimited Contacts – PowerSchool 11 and under

Father (last, first)	<input type="text"/>	Parent Information	Mother's Name	<input type="text" value="Adair, Willima"/>
Father's Day Phone	<input type="text"/>	Daytime Phone	<input type="text" value="1-555-555-9027"/>	
Father's Employer	<input type="text"/>	Father's Name	<input type="text"/>	
Father's Home Phone	<input type="text"/>	Daytime Phone	<input type="text"/>	
Gender	<input type="text" value="Male (M)"/> *	Guardian Name & Info	Last, First, Middle	<input type="text"/>
Grade Level	<input type="text" value="12"/>	Daytime Phone	<input type="text"/>	Relationship Code <input type="text"/>
Graduation Year	<input type="text"/>	Previous Guardian Info	<input type="text"/>	
Guardianship	<input type="text"/>	Single Parent Household	<input type="text"/>	
Guardian Email	<input type="text"/>	Guardian Email	<input type="text"/>	
Mother (last, first)	<input type="text" value="Adair, Willima"/>	Guardian's Email Address:	<input type="text"/>	
Mother's Day Phone	<input type="text" value="1-555-555-9027"/>			
Mother's Employer	<input type="text" value="Apple Computers"/>			
Mother's Home Phone	<input type="text" value="1-555-555-8124"/>			
	Contact #1	Contact Name (Last, First)	<input type="text" value="Mccarthy, Jonathan"/>	Relationship <input type="text"/>
		Phone	<input type="text" value="1-555-555-6049"/>	Phone Type <input type="text"/>
	Contact #2	Contact Name (Last, First)	<input type="text"/>	Relationship <input type="text"/>
		Phone	<input type="text"/>	Phone Type <input type="text"/>
	Contact #3	Contact Name (Last, First)	<input type="text"/>	Relationship <input type="text"/>
		Phone	<input type="text"/>	Phone Type <input type="text"/>

Previously, PowerSchool had only these sections for contact information.

Good for simple situations, but in reality they often fell short.

In practice, most districts have many customizations that expanded on this section to handle the data they needed.

These views are still accessible, but once you switch to Unlimited Contacts their use is not recommended.

Unlimited Contacts – PowerSchool 12.0+

Contacts    

Adair, Brandon  12 3 A AGHS1

☐ Show All (+0) [Add](#)

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
 	John Adair <test@tes.or.co.uk>	Father	Daytime	737-680-2989	1786 Violet Way Jackson, MS 39202	✓		✓	✓				✓	 
 	Willima Adair	Mother	Home	1-555-555-8124	9941 Jasmine Drive Jackson, MS 39202	✓	✓	✓	✓	Mother				 
 	Sally Adair	Aunt	Mobile	544-559-6688				✓						 
 	Jonathan Mccarthy			1-555-555-6049					✓	Emergency 1				 
 	Jason Adair	Uncle	Mobile	249-655-2249				✓						 

New versions of PowerSchool have a new Contacts page to manage relationships.

Contacts allow significantly more flexibility and control, so long as the data is properly cleaned before use.*

*Cleaning includes merging duplicates, properly setting access and flags

Unlimited Contacts – Student Data Overview

Contacts are usually* strictly ordered, meaning the top contact would be who you would contact first. Contacts with Data Access and Custody would come first

* Exact rules for ordering are up to your District's discretion

Show All (+0) [Add](#)

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
 	John Adair <test@tes.or.co.uk>	Father	Daytime	737-680-2989	1786 Violet Way Jackson, MS 39202	✓		✓	✓				✓	 
 	Willima Adair	Mother	Home	1-555-555-8124	9941 Jasmine Drive Jackson, MS 39202	✓	✓	✓	✓	Mother				 
 	Sally Adair	Aunt	Mobile	544-559-6688				✓						 
 	Jonathan Mccarthy			1-555-555-6049					✓	Emergency 1				 
 	Jason Adair	Uncle	Mobile	249-655-2249				✓						 

Unlimited Contacts – Student Data Overview

This column displays the Contact's name as well as their Primary / highest ordered Email.

Clicking their *NAME* allows you to edit this record. This is important to note as the Edit / Pencil icon on the right can be misleading, is used to edit the Relationship between the student and contact.

Show All (+0) [Add](#)

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
 	John Adair <test@tes.or.co.uk>	Father	Daytime	737-680-2989	1786 Violet Way Jackson, MS 39202	✓		✓	✓				✓	 
 	Willima Adair	Mother	Home	1-555-555-8124	9941 Jasmine Drive Jackson, MS 39202	✓	✓	✓	✓	Mother				 
 	Sally Adair	Aunt	Mobile	544-559-6688				✓						 
 	Jonathan Mccarthy			1-555-555-6049					✓	Emergency 1				 
 	Jason Adair	Uncle	Mobile	249-655-2249				✓						 

Unlimited Contacts – Student Data Overview

The Relationship column displays the relationship between the Contact and the currently selected student.

This field by default has 11 options (shown to the right), but PowerSchool administrators are able to add more if needed by going to [District](#) -> [Code Sets](#) -> [Relationship](#) while under District Office

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
	John Adair <test@tes.or.co.uk>	Father	Daytime	737-680-2989	1786 Violet Way Jackson, MS 39202	✓		✓	✓				✓	
	Willima Adair	Mother	Home	1-555-555-8124	9941 Jasmine Drive Jackson, MS 39202	✓	✓	✓	✓	Mother				
	Sally Adair	Aunt	Mobile	544-559-6688				✓						
	Jonathan Mccarthy			1-555-555-6049					✓	Emergency 1				
	Jason Adair	Uncle	Mobile	249-655-2249				✓						

Show All (+0) [Add](#)

Code
Aunt
Brother
Father
Friend
Grandfather
Grandmother
Mother
Neighbor
Other
Sister
Uncle

Unlimited Contacts – Student Data Overview

The Phone columns display the highest ordered Phone record.

This field by default has 4 options (shown to the right), but PowerSchool administrators are able to add more if needed by going to [District -> Code Sets -> Phone](#) while under District Office

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
	John Adair <test@tes.or.co.uk>	Father	Daytime	737-680-2989	1786 Violet Way Jackson, MS 39202	✓		✓	✓				✓	
	Willima Adair	Mother	Home	1-555-555-8124	9941 Jasmine Drive Jackson, MS 39202	✓	✓	✓	✓	Mother				
	Sally Adair	Aunt	Mobile	544-559-6688				✓						
	Jonathan Mccarthy			1-555-555-6049					✓	Emergency 1				
	Jason Adair	Uncle	Mobile	249-655-2249				✓						

Show All (+0) [Add](#)

Code

Daytime

Home

Mobile

Work

Unlimited Contacts – Student Data Overview

The Address columns display the highest ordered Address record.

Show All (+0) [Add](#)

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
	John Adair <test@tes.or.co.uk>	Father	Daytime	737-680-2989	1786 Violet Way Jackson, MS 39202	✓		✓	✓				✓	
	Willima Adair	Mother	Home	1-555-555-8124	9941 Jasmine Drive Jackson, MS 39202	✓	✓	✓	✓	Mother				
	Sally Adair	Aunt	Mobile	544-559-6688				✓						
	Jonathan Mccarthy			1-555-555-6049					✓	Emergency 1				
	Jason Adair	Uncle	Mobile	249-655-2249				✓						

Unlimited Contacts – Student Data Overview

The Relationship Flags are used to explain the relationship between a student and contact further.

Custody – indicates legal custody

Lives With - indicates whether the student resides with this contact

School Pickup – indicates if this contact is authorized to take the student away from School

Emergency Contact – Indicates if this contact should be called in the case of an emergency*

*Some districts mark all authorized contacts as Emergency, where some only indicate non-custodial emergency contacts as Emergency. Either method works, so long as your district is consistent in use.

Show All (+0) [Add](#)

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
	John Adair <test@tes.or.co.uk>	Father	Daytime	737-680-2989	1786 Violet Way Jackson, MS 39202	✓		✓	✓				✓	
	Willima Adair	Mother	Home	1-555-555-8124	9941 Jasmine Drive Jackson, MS 39202	✓	✓	✓	✓	Mother				
	Sally Adair	Aunt	Mobile	544-559-6688				✓						
	Jonathan Mccarthy			1-555-555-6049					✓	Emergency 1				
	Jason Adair	Uncle	Mobile	249-655-2249				✓						

Unlimited Contacts – Student Data Overview

The Original Contact Type column indicates if the contact was automatically migrated from a legacy field the old contacts fields sown earlier).

If this field has a value, it means that this contact record was generated automatically by PowerSchool, and is still linked with the old fields. This means changing information for this contact will update the old fields and vice versa.

These Legacy records can cause data issues when you begin using Unlimited Contacts, and in nearly all cases will lead to duplicate records, so it is best to clean up the Original Contact Type.

Show All (+0) [Add](#)

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
	John Adair <test@tes.or.co.uk>	Father	Daytime	737-680-2989	1786 Violet Way Jackson, MS 39202	✓		✓	✓				✓	
	Willima Adair	Mother	Home	1-555-555-8124	9941 Jasmine Drive Jackson, MS 39202	✓	✓	✓	✓	Mother				
	Sally Adair	Aunt	Mobile	544-559-6688				✓						
	Jonathan Mccarthy			1-555-555-6049					✓	Emergency 1				
	Jason Adair	Uncle	Mobile	249-655-2249				✓						

Unlimited Contacts – Student Data Overview

The Start and End Date columns indicate whether or not this relationship is currently active.

If a record is no longer active due to the current date not falling within the date range, the records will be hidden by default, but can be viewed by checking the “Show All” checkbox

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
	John Adair <test@tes.or.co.uk>	Father	Daytime	737-680-2989	1786 Violet Way Jackson, MS 39202	✓		✓	✓				✓	
	Willima Adair	Mother	Home	1-555-555-8124	9941 Jasmine Drive Jackson, MS 39202	✓	✓	✓	✓	Mother				
	Sally Adair	Aunt	Mobile	544-559-6688				✓						
	Jonathan Mccarthy			1-555-555-6049					✓	Emergency 1				
	Jason Adair	Uncle	Mobile	249-655-2249				✓						

Show All (+0)

Unlimited Contacts – Student Data Overview

The Data Access column indicates if this Contact is able to access this students data in PowerSchool.

Simply put, it means that if this contact has a Parent Portal account, they would be able to see this student.

SchoolEngage uses the data access flag to determine account access, so it is critical that the Data Access flag be properly maintained.

Show All (+0) [Add](#)

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
	John Adair <test@tes.or.co.uk>	Father	Daytime	737-680-2989	1786 Violet Way Jackson, MS 39202	✓		✓	✓				✓	
	Willima Adair	Mother	Home	1-555-555-8124	9941 Jasmine Drive Jackson, MS 39202	✓	✓	✓	✓	Mother				
	Sally Adair	Aunt	Mobile	544-559-6688				✓						
	Jonathan Mccarthy			1-555-555-6049					✓	Emergency 1				
	Jason Adair	Uncle	Mobile	249-655-2249				✓						

Unlimited Contacts – Student Data Overview

The “Add” Button allows you create a new Contact for this student, or link them to an existing account

Add Contacts ✕

First Name	Last Name
<input type="text"/>	<input type="text"/>
Street Address	Unit
<input type="text"/>	<input type="text"/>
Phone Number	Extension
<input type="text"/>	<input type="text"/>
Email Address	
<input type="text"/>	
<input type="checkbox"/> Include Inactive <input checked="" type="checkbox"/> 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	
<input type="button" value="Search"/>	

Search results (0)

Show All (+0)

Original Contact Type	Start Date	End Date	Data Access	Actions
			✓	<input type="button" value="edit"/> <input type="button" value="delete"/>
Mother				<input type="button" value="edit"/> <input type="button" value="delete"/>
				<input type="button" value="edit"/> <input type="button" value="delete"/>
Emergency 1				<input type="button" value="edit"/> <input type="button" value="delete"/>
				<input type="button" value="edit"/> <input type="button" value="delete"/>

Unlimited Contacts – Student Data Overview

The “-” Button allows you to delete a Student-Contact relationship. This only severs the link to the student, it does not remove the Contact from PowerSchool.

Delete Student Contact Relationship

Change Access ID and Password

You are about to delete a student contact relationship. You may also optionally change the student's access ID and/or password to prevent the contact from accessing this student's information.

Access ID	<input type="text" value="myaccount"/>
Access Password	<input type="text" value="mypassword"/>

Show All (+0)

Original Contact Type	Start Date	End Date	Data Access	Actions
			✓	<input type="button" value="edit"/> <input type="button" value="-"/>
Mother				<input type="button" value="edit"/> <input type="button" value="-"/>
				<input type="button" value="edit"/> <input type="button" value="-"/>
Emergency 1				<input type="button" value="edit"/> <input type="button" value="-"/>
				<input type="button" value="edit"/> <input type="button" value="-"/>

Unlimited Contacts – Student Data Overview

The “Pencil” Button allows you to edit a Student-Contact relationship. This allows you to set the Relationship Flags seen earlier, as well as the main Relationship and Original Relationship.

Active All

Relationship: Mother

Start Date: MM/DD/YYYY

End Date: MM/DD/YYYY

Has Custody

Lives With

School Pickup

Emergency Contact

Receives Mail

Notes

Approximately 4000 characters left

Original Contact Type: Mother

Cancel Submit

Show All (+0) **Add**

Custody	Lives With	School Pickup	Emerg. Contact	Original Contact Type	Start Date	End Date	Data Access	Actions
✓		✓	✓				✓	 
✓	✓	✓	✓	Mother				 
		✓						 
			✓	Emergency 1				 
		✓						 

Unlimited Contacts – Contact Data Overview

As mentioned earlier, if you click on the name of a Contact you can access their record.

The data in this record is accessible to all student records linked to them, and any changes to their data will be reflect to all linked users.

The “Active” flag indicates if this Contact is currently linked to an Active student at an school in the district. If it is disabled, they will b hidden by default from searches.

Contact Details

▼ Demographics

Prefix	First Name	Middle Name	Last Name	Suffix
<input type="text" value=""/>	<input type="text" value="John"/>	<input type="text" value=""/>	<input type="text" value="Adair"/>	<input type="text" value=""/>

Gender

Employer

Active

Unlimited Contacts – Contact Data Overview

The next section within a contact is their Web Access Account (Parent Portal). Here we can see their Username (how they log in), Email (where SchoolEngage sends emails to) and whether or not the account is active. If the account is inactive they cannot log in. If it is active, they can log in, even if they have access to no students.

Pressing Edit Account will allow you to change the details as well as reset the password.

▼ Web Account Access

Account Enabled	Username	Account Email
<input checked="" type="checkbox"/>	jadair	test@tes.or.co.uk

[Edit Account](#)

Account Enabled

Username

New Password

Confirm Password

Account Email Select existing email ▼

- Select existing email
- test@tes.or.co.uk

Unlimited Contacts – Contact Data Overview

The next section within a contact is the Students panel. This table is identical to the one shown from the students view, except it shows students attached to a particular contact. There is no ordering of students within a contact.

▼ 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	Father	✓		✓	✓				✓	 

Unlimited Contacts – Contact Data Overview

The next section within a contact is the Phones section.

Phones are strictly ordered, and the Phone at the top of the list will be pulled into the Students view. Preferred indicates this is how the Contact would like to be contacted.

▼ Phone Numbers [Add Phone](#)

Order	Type	Phone Number	Preferred	SMS	Action
 	Daytime	737-680-2989			 

Unlimited Contacts – Contact Data Overview

The next section within a contact is the Emails section.

Emails are not order, but the Primary email will always be listed first. Email and Access Accounts are stored separately and can be different than each other, although this is not recommended.

▼ Email Addresses

[Add Email](#)

Primary	Type	Email Address	Action
	Additional	test@tes.or.co.uk	✎ ✖

Unlimited Contacts – Contact Data Overview

The last section within a Contact is Addresses. Contacts are strictly ordered, and the first ordered Address will appear on the students view of their Contacts.

Address can have start and end dates similar to relationship. If an address is not active on the current date, it will be hidden. Pressing “Show All” will display hidden addresses.

Addresses

Show All (+0) [Add Address](#)

Order	Type	Address Line 1 Address Line 2	Unit	City	State/Province	Postal Code	Country	Start Date	End Date	Action
 		1786 Violet Way		Jackson	Mississippi (MS)	39202	US			 

Unlimited Contacts – Challenges: Linked Data

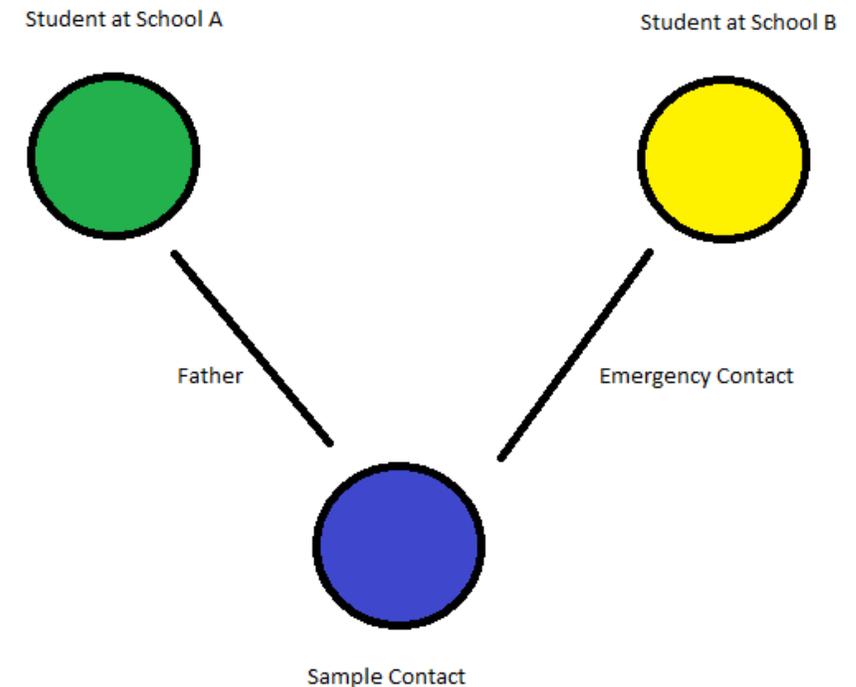
Contact records are shared across all users they're linked to, meaning someone could make a mistake and it would effect other users.

For Example:

The Sample Contact (in Blue) has phone number 555-1234 and is father of Student A (in Green)

If the Student B (in Yellow) adds this Contact as an Emergency Contact and makes the mistake 555-1237, then it will overwrite the data.

Following this, if the school needs to call Student A's Father, they will not be able to get a hold of them as the number is wrong



Unlimited Contacts – Challenges: Duplicate Prevention

Using the legacy fields will auto-generate new Contacts with weak data, almost always duplicates.

Creating a Parent Portal Access Account via the old Access Accounts page will create the new Access Account as an empty Contact with all other fields missing, so creating them in Contacts is necessary.

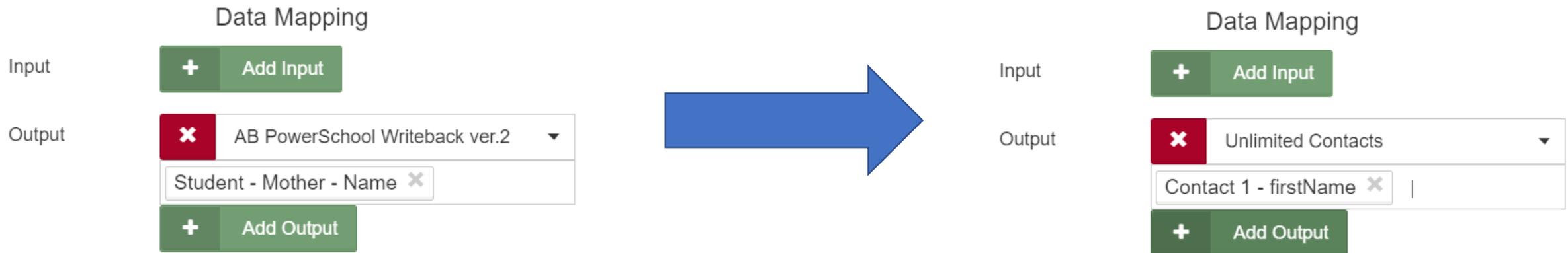
When adding a new contacts always check for matches, even inactive, and check known siblings for similar contacts.

PowerSchool Contacts - Questions and Feedback?



Contact Data in SchoolEngage Forms

- In order to maximize compatibility, we have aimed to make converting old SchoolEngage forms to unlimited contacts as easy as possible



Contact Data in SchoolEngage Forms

Show All (+0) [Add](#)

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	John Adair <test@tes.or.co.uk>	Father	Daytime	737-680-2989	1786 Violet Way Jackson, MS 39202	✓		✓	✓				✓	Edit Delete
2	Willima Adair	Mother	Home	1-555-555-8124	9941 Jasmine Drive Jackson, MS 39202	✓	✓	✓	✓	Mother				Edit Delete
3	Sally Adair	Aunt	Mobile	544-559-6688				✓						Edit Delete
4	Jonathan Mccarthy			1-555-555-6049					✓	Emergency 1				Edit Delete
5	Jason Adair	Uncle	Mobile	249-655-2249				✓						Edit Delete

In SchoolEngage we have setup the Contacts Mapping setup to match PowerSchool as closely as possible, using a similar layout to the Contacts table in PowerSchool

Contacts 6

[+ Create](#)

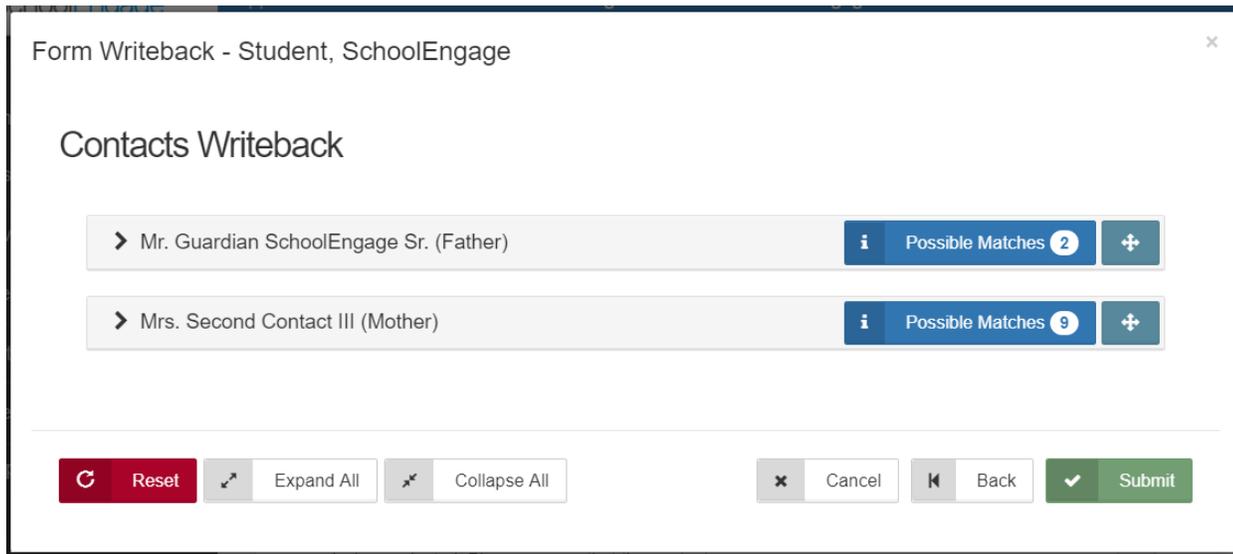
		NAME	ORDER	# PHONES	# EMAILS	# ADDRESSES	CUSTODY	LIVES	PICKUP	EMERG.	ACTIVE	ACCESS	RELATIONS	TYPES	
Edit	Share	Contact 1	1	4	2	2				✗					Delete
Edit	Share	Contact 2	2	4	2	2				✗					Delete
Edit	Share	Contact 3	3	4	2	2				✗					Delete
Edit	Share	Emergency Contact 1	1	0	0	0				✓					Delete
Edit	Share	Emergency Contact 2	2	3	2	3				✓					Delete
Edit	Share	Emergency Contact 3	3	3	3	3				✓					Delete

Due to the dynamic nature of Contacts, instead of a specific contact, the setup page allows you to build a generic structure for how you'd like the contacts ordered in PowerSchool – these will be setup by your district SchoolEngage Admin and us so don't worry

Writing Back Contacts

On a form with Unlimited Contacts mapped, a new section will be added to the writeback process for Unlimited Contacts

Contacts are loaded from PowerSchool (if any exist), and then matched based on the mapping rules setup by the district.



The screenshot shows a web interface titled "Form Writeback - Student, SchoolEngage". Below the title is a section labeled "Contacts Writeback". There are two contact entries, each with a right-pointing arrow, an information icon, a "Possible Matches" count, and a plus icon:

- Mr. Guardian SchoolEngage Sr. (Father) - Possible Matches 2
- Mrs. Second Contact III (Mother) - Possible Matches 9

At the bottom of the interface is a control bar with the following buttons from left to right: "Reset" (red), "Expand All" (with an expand icon), "Collapse All" (with a collapse icon), "Cancel" (with an 'x' icon), "Back" (with a left arrow icon), and "Submit" (green with a checkmark icon).

Note* This interfaces shown are being piloted with a few districts, and are subject to change based on feedback

Writing Back Contacts

Form Writeback - Student, SchoolEngage

Contacts Writeback

> Mr. Guardian SchoolEngage Sr. (Father) Possible Matches 2

> Mrs. Second Contact III (Mother) Possible Matches 9

Reset Expand All Collapse All Cancel Back Submit

Reset: Revert all changes to the contact data and reset it to the data that was setup when the writeback window was opened.

Expand / Collapse All: Show or hide the full contacts Information

Writing Back Contacts

Form Writeback - Student, SchoolEngage

Contacts Writeback

- > Mr. Guardian SchoolEngage Sr. (Father) Possible Matches 2
- > Mrs. Second Contact III (Mother) Possible Matches 3

Reset Expand All Collapse All Cancel Back Submit



Form Writeback - Student, SchoolEngage

Contacts Writeback

- > Mrs. Second Contact III (Mother) Possible Matches 3
- > Mr. Guardian SchoolEngage Sr. (Father) Possible Matches 2

Reset Expand All Collapse All Cancel Back Submit

On any record, the outside arrow icon can be used to click and drag records to reorder them. This will reorder them in PowerSchool, even if there are no other changes

Writing Back Contacts

Form Writeback - Student, SchoolEngage

Contacts Writeback

> Mr. Guardian SchoolEngage Sr. (Father) ℹ Possible Matches 2 +

> Mrs. Second Contact III (Mother) ℹ Possible Matches 9 +

↻ Reset ↕ Expand All ⌵ Collapse All ✕ Cancel ⏪ Back ✓ Submit

PowerSchool Contact Matches

NAME	STUDENT	RELATIONSHIP	REASON
<input type="radio"/>	Thor Odinson		Match on Email #1 firstcontact@schoolengage.ca.
	Mary Anntoinette	Neighbor	
	NAME NAME	Sister	
	Jacob Case	Not Set	
	Chantel Earl	Not Set	
	Holy Spirit	Neighbor	

On any record that did not find an existing match, or for students new to PowerSchool for this student, a “Possible matches” button will appear if a search of the system turns up any candidates for a match.

You will get to see the reason for the match, and any other students this Contact is linked to, as well as how they’re related.

Writing Back Contacts

gage Sr. (Father) Used By 5

(Mother) Possible Matches 9

STUDENT	SCHOOL	RELATIONSHIP	START DATE	END DATE	NOTE	CUSTODY	LIVES	PICKUP	EMERG.	MAILS	DATA ACCESS
Mary Anntoinette	AGHS1	Neighbor		02/22/2020		✗	✗	✓	✗	✗	✗
NAME NAME	AGHS1	Sister				✓	✗	✓	✗	✗	✓
Jacob Case	AGHS1	Not Set				✗	✗	✗	✗	✗	✗
Chantel Earl	AGHS1	Not Set				✗	✗	✗	✗	✗	✗
Holy Spirit	HRCS	Neighbor				✗	✗	✓	✗	✗	✗

On any record that is already linked to a contact in PowerSchool, you may see a “Used By” button.

Pressing the “User By” Button will show you a condensed version of that Contacts relationships. This way you can quickly reference things such as siblings.

Writing Back Contacts

Mrs. Second Contact III (Mother) Possible Matches 9			
COLUMN	ORIGINAL FORM	POWERSCHOOL	SCHOOLENGAGE
DEMOGRAPHICS			
Name	New	New	Mrs. Second Contact III
Gender	New	New	
Employer	New	New	
ACCESS			
Data Access	New	New	<input type="checkbox"/> Data Access
SE Account	New	New	
Email	New	New	
Username	New	New	
RELATIONSHIP			
Relationship	New	New	Mother
Start Date	New	New	Start Date
End Date	New	New	End Date
Note	New	New	
Flags	New	New	CUSTODY LIVES PICKUP EMERG. MAILS

By clicking on any individual contact, you will see the expanded data.

The expanded view is setup to mimic a Contacts Record in PowerSchool so it can easily be compared

Writing Back Contacts

The first column outlines what data falls into each row. In the flags row, an additional header is added to clearly show what data is present.

COLUMN	ORIGINAL FORM	POWERSCHOOL	SCHOOLENGAGE
DEMOGRAPHICS			
Name	New	New	Mrs. Second Contact III
Gender	New	New	
Employer	New	New	
ACCESS			
Data Access	New	New	<input type="checkbox"/> Data Access
SE Account	New	New	
Email	New	New	
Username	New	New	
RELATIONSHIP			
Relationship	New	New	Mother
Start Date	New	New	Start Date
End Date	New	New	End Date
Note	New	New	
Flags	New	New	CUSTODY LIVES PICKUP EMERG. MAILS

Writing Back Contacts

▼ Mrs. Second Contact III (Mother) Possible Matches 9

COLUMN	ORIGINAL FORM	POWERSCHOOL	SCHOOLENGAGE
DEMOGRAPHICS			
Name	New	New	Mrs. Second Contact III
Gender	New	New	
Employer	New	New	
ACCESS			
Data Access	New	New	<input type="checkbox"/> Data Access
SE Account	New	New	
Email	New	New	
Username	New	New	
RELATIONSHIP			
Relationship	New	New	Mother
Start Date	New	New	Start Date
End Date	New	New	End Date
Note	New	New	
Flags	New	New	CUSTODY LIVES PICKUP EMERG. MAILS

The “Original Form” column shows what data was on the form at the time it was generated. For a registration form, this will usually be blank. For a Demographics Update or Re-enrollment, this will contain the data that was in PowerSchool at the time the form was generated.

Writing Back Contacts

▼ Mrs. Second Contact III (Mother) Possible Matches 9

COLUMN	ORIGINAL FORM	POWERSCHOOL	SCHOOLENGAGE
DEMOGRAPHICS			
Name	New	New	Mrs. Second Contact III
Gender	New	New	
Employer	New	New	
ACCESS			
Data Access	New	New	<input type="checkbox"/> Data Access
SE Account	New	New	
Email	New	New	
Username	New	New	
RELATIONSHIP			
Relationship	New	New	Mother
Start Date	New	New	Start Date
End Date	New	New	End Date
Note	New	New	
Flags	New	New	CUSTODY LIVES PICKUP EMERG. MAILS

The “PowerSchool” column shows what data is in PowerSchool for this contact. This data is pulled live, so it will always be accurate.

If there is no data in this column, it means this record is not linked to any contact in PowerSchool.

Writing Back Contacts

▼ Mrs. Second Contact III (Mother)

COLUMN	ORIGINAL FORM	POWERSCHOOL	SCHOOLENGAGE
DEMOGRAPHICS			
Name	New	New	Mrs. Second Contact III
Gender	New	New	
Employer	New	New	
ACCESS			
Data Access	New	New	<input type="checkbox"/> Data Access
SE Account	New	New	
Email	New	New	
Username	New	New	
RELATIONSHIP			
Relationship	New	New	Mother
Start Date	New	New	<input type="text"/>
End Date	New	New	<input type="text"/>
Note	New	New	
Flags	New	New	CUSTODY LIVES PICKUP EMERG. MAILS

The “SchoolEngage” column displays the information that was on the form at the time it was Approval and finalized. This is the data that will be moved to PowerSchool if pushed.

Writing Back Contacts

COLUMN	ORIGINAL FORM	POWERSCHOOL	SCHOOLENGAGE
DEMOGRAPHICS			
Name	New	Dr. Thor Odinson Sr.	Mr. Guardian SchoolEngage Sr.
Gender	New	M	M
Employer	New		Jobs Inc.

DEMOGRAPHICS			
Name	New	New	Mrs. Second Contact III
Gender	New	New	
Employer	New	New	

Middle Name
Mrs. Second Contact III

Cell Coloring:

Yellow: Indicates this record is unique and should be reviewed. This will occur if data in one column is different than the other two.

Green: This indicates that a piece of data only appears in one column, and so that column is assumed to be correct. This will occur if the record is new, and only exists in SchoolEngage, or if the record exists in PowerSchool but was not mapped on the form.

Writing Back Contacts

▼ Mr. Guardian SchoolEngage Sr. (Father) Used By 5				
COLUMN	ORIGINAL FORM	POWERSCHOOL	SCHOOLENGAGE	
DEMOGRAPHICS				
Name	New	Dr. Thor Odinson Sr.	Mr. Guardian SchoolEngage Sr.	
Gender	New	M	M	
Employer	New		Jobs Inc.	

Middle Name	
Mrs. Second	Contact III

Phone #1 SMS	
MOBILE 123-123-1239 x	

Individual Green highlight within cell:

If an individual item in a row is highlighted, it means that a specific piece of data exists in PowerSchool but was not mapped on the form. Hovering over the green cell will explain what it contains.

Writing Back Contacts

Red indicates that a record exists only in PowerSchool and will be overwritten

DEMOGRAPHICS			
Name	New	Mr. SPLITY TEST Sr.	Mrs. Second Contact III
Gender	New	M	
Employer	New	Jobs Inc.	

Writing Back Contacts - Demographics

The first section in the expanded Contacts view is the basic Demographics information. This contains the basic information regarding any given contact.

The only required field is Last Name, however adding First Name is always Recommended

▼ Mr. Guardian SchoolEngage Sr. (Father) ⚠ Used By 5 +				
COLUMN	ORIGINAL FORM	POWERSCHOOL	SCHOOLENGAGE	
DEMOGRAPHICS				
Name	New	Dr. Thor Odinson Sr.	Mr. Guardian SchoolEngage Sr.	
Gender	New	M	M	
Employer	New		Jobs Inc.	

DEMOGRAPHICS				
Name	New	Mrs. Second JacobJingle Contact III	Mrs. Second Contact III	
Gender	New	M		
Employer	New			

Writing Back Contacts - Demographics

One thing of note in this section is the Action dropdown. This allows you do choose from a list of all Contacts present on the SchoolEngage form, as well as two other options: Do Not Update, and Unlink.

Action

COLUMN	ORIGINAL FORM	POWERSCHOOL	SCHOOLENGAGE
DEMOGRAPHICS			
Name	New	Mrs. Second JacobJingle Contact III	Mrs. Second Contact III
Gender	New	M	
Employer	New		

Writing Back Contacts - Demographics

Selecting “Do Not Update” will indicate that the record in PowerSchool is entirely correct, and does not need any changes*.

Note* Re-ordering Contacts will always occur if performed, as order is not considering a change to the Contacts record itself.

COLUMN	ORIGINAL FORM	POWERSCHOOL	SCHOOLENGAGE
DEMOGRAPHICS			
Name	New	Mrs. Second JacobJingle Contact III	Do not update
Gender	New	M	Do not update
Employer	New		Do not update

Writing Back Contacts - Demographics

Selecting “Unlink” will indicate that the Relationship between the student and the Contact should be removed in PowerSchool. Be aware that this is not the same as expiring a record, and should only be used to separate a Contact that was linked in Genuine error.

As Contacts are linked to many students, and retaining records is important, there is no way to delete a contact in SchoolEngage, only removing the relationships are allowed.

COLUMN	ORIGINAL FORM	POWERSCHOOL	SCHOOLENGAGE	
DEMOGRAPHICS				
Name	New	Mrs. Second JacobJingle Contact III	Unlink Unlink	
Gender	New	M	Unlink	
Employer	New		Unlink	

Writing Back Contacts - Relationship

The Relationship section contains any data that would be stored in the “Edit relationship” popup in PowerSchool. Of note here, it is always good to review the Flags to ensure they are set correctly. Additionally, there is the option to expire a relationship via start and end dates even if those fields are not on the form.

RELATIONSHIP												
Relationship	New		Father									
Start Date	New	<input type="checkbox"/>	<input type="text" value="Start Date"/>									
End Date	New	<input type="checkbox"/>	<input type="text" value="End Date"/>									
Note	New											
Flags	New		CUSTODY	LIVES	PICKUP	EMERG.	MAILS	CUSTODY	LIVES	PICKUP	EMERG.	MAILS
								✓	✓	✓	✓	✓

Writing Back Contacts – Access Accounts

The access section is used to convey the information present in the system regarding parent access. If a username and email are displayed in the PowerSchool column, this means the Contact has a Parent Portal account.

If Data Access is checked, this indicates if the user has access to this student specifically

SE Account displays the name of the parent in the system if they are linked to a SchoolEngage Account

In SchoolEngage now, Parent Portal Accounts are generated for the user who filled the form out. Once you move to Unlimited Contacts, you will have to manage all Access Accounts this way.

ACCESS			
Data Access	New	✓ Data Access	<input checked="" type="checkbox"/> Data Access
SE Account	New		
Email	New	PARENT@PARENT.PARENT	PARENT@PARENT.PARENT
Username	New	parent.parentt	parent.parentt

Writing Back Contacts – Access Accounts

If a Contact did not previously have a Parent Portal Account and Data Access is checked, they will be prompted to choose an email from that Contact's email list, and optional choose the Contact's SchoolEngage Account (if there are any existing SchoolEngage accounts linked to this student that do not have Parent Portal access)

 Data Access	<input checked="" type="checkbox"/> Data Access
	New
	<input type="text" value="Email"/>
	<input type="text" value="firstcontact@schoolengage.ca"/>

Writing Back Contacts – Contact Information

Phones and Addresses may be re-ordered using the arrow icons, just like contacts can.

Emails are not ordered in PowerSchool, but one may be marked as “Primary” using the checkbox to the right of the dropdowns. While Emails are unordered, the Primary email will always be first.

PHONES				
Phone #1	New	888-888-9999 x333	Do not update	<input type="checkbox"/>
Phone #2	New	888-888-8887 x	Do not update	<input type="checkbox"/>
Phone #3	New	888-877-9989 x	Do not update	<input type="checkbox"/>
Phone #4	New	888-888-5555 x	Do not update	<input type="checkbox"/>
EMAILS				
Email #1	New	CURRENT Email@email.com	firstcontact@schoolengage.ca	<input type="checkbox"/>
Email #2	New	firstcontact@schoolengage.ca	Do not update	<input type="checkbox"/>
ADDRESSES				
Address #1	New	HOME 102a 111a , 1111a , AB , CA - Way Start Date 02/03/2020 End Date 02/24/2028	MAILING 403 123 44th Street NW, Edmonton, / Start Date End Date	<input type="checkbox"/>
Address #2	New	MAILING 102 111 , Valhalla , NU , CA - Crescent Start Date End Date	HOME 501 135 77th Street NW, Edmonton, AE Start Date End Date	<input type="checkbox"/>

Writing Back Contacts – Contact Information

PHONES			
Phone #1	New	888-888-9999 x333	Do not update
Phone #2	New	888-888-8887 x	Do not update
Phone #3	New	888-877-9989 x	Do not update
Phone #4	New	888-888-5555 x	Do not update
EMAILS			
Email #1	New	CURRENT Email@email.com	firstcontact@schoolengage.ca
Email #2	New	firstcontact@schoolengage.ca	Do not update
ADDRESSES			
Address #1	New	HOME 102a 111a , 1111a , AB , CA - Way Start Date 02/03/2020 End Date 02/24/2028	MAILING 403 123 44th Street NW, Edmonton, / Start Date End Date
Address #2	New	MAILING 102 111 , Valhalla , NU , CA - Crescent Start Date End Date	HOME 501 135 77th Street NW, Edmonton, AE Start Date End Date

As with the contact records, these will be matched based on inputs, and can be changed. The list will contain all records available, as well as

Do Not Update – Do not change anything

Unlink – Remove this record from this user. This will remove this entry entirely and it will no longer be visible to any linked student.

Writing Back Contacts – Matching Information

The default matches are determined based on the form setup.

To simplify, during form setup you can map fields based on how you want the data linked in writeback, and SchoolEngage will try and match based on that criteria.

Output

The screenshot displays a configuration window for 'Output'. At the top, there is a dropdown menu with a red 'x' icon on the left and the text 'Unlimited Contacts' followed by a downward arrow. Below this is a list of items, with the first item being 'Contact 6 - 1st Daytime Phone: Extension' and a small 'x' icon to its right. At the bottom of the window is a green button with a white plus sign and the text 'Add Output'.

Writing Back Contacts – Correcting Data

PHONES			
Phone #1	New	DAYTIME 999-999-9999 x	DAYTIME 999-999-9999 x
Phone #2	New	HOME 111-111-1119 x	HOME 111-111-1119 x
Phone #3	New	MOBILE 123-123-1239 x	WORK 444-444-4449 x
Phone #4	New	WORK 444-444-4449 x	MOBILE 123-123-1239 x



Phone #3	New	MOBILE 123-123-1239 x	Phone #3
Phone #4	New	WORK 444-444-4449 x	[Daytime] 999-999-9999 [Preferred]

EMAILS

Email #1	New	firstcontact@schoolengage.ca	[Home] 111-111-1119
			[Mobile] 123-123-1239
			[Work] 444-444-4449



PHONES			
Phone #1	New	DAYTIME 999-999-9999 x	DAYTIME 999-999-9999 x
Phone #2	New	HOME 111-111-1119 x	HOME 111-111-1119 x
Phone #3	New	MOBILE 123-123-1239 x	MOBILE 123-123-1239 x
Phone #4	New	WORK 444-444-4449 x	Phone #4

Unused phones + WORK 444-444-4449 x

Let's say for example, all 4 phone numbers pulled in, but the appeared out of order, maybe the guardian swapped them on the form when filling it out.

Go to the first mismatched record and choose the correct match.

You can see that Phone #3 is correctly matched, but Phone #4 is now empty. We treat the sets of data on the form as objects, meaning they can only be used once. This means if you use them for a match someone and they have been used, it will clear the original field.

Writing Back Contacts – Correcting Data

PHONES			
Phone #1	New	DAYTIME 999-999-9999 x ✓	DAYTIME 999-999-9999 x ✓
Phone #2	New	HOME 111-111-1119 x	HOME 111-111-1119 x
Phone #3	New	MOBILE 123-123-1239 x	MOBILE 123-123-1239 x
Phone #4	New	WORK 444-444-4449 x	Phone #4
Unused phones		+ WORK 444-444-4449 x	



Phone #1	New	DAYTIME 999-999-9999 x ✓	DAYTIME 999-999-9999 x ✓
Phone #2	New	HOME 111-111-1119 x	HOME 111-111-1119 x
Phone #3	New	MOBILE 123-123-1239 x	MOBILE 123-123-1239 x
Phone #4	New	WORK 444-444-4449 x	Phone #4
Unused phones		+ WORK 444-444-4449 x	
EMAILS			

Phone #4

- [Daytime] 999-999-9999 [Preferred]
- [Home] 111-111-1119
- [Mobile] 123-123-1239
- [Work] 444-444-4449



PHONES			
Phone #1	New	DAYTIME 999-999-9999 x ✓	DAYTIME 999-999-9999 x ✓
Phone #2	New	HOME 111-111-1119 x	HOME 111-111-1119 x
Phone #3	New	MOBILE 123-123-1239 x	MOBILE 123-123-1239 x
Phone #4	New	WORK 444-444-4449 x	WORK 444-444-4449 x

Any SchoolEngage Contact data records that are not being used will appear in an “Unused” section. This is true of Phones, Emails, Addresses, and Contacts themselves

We can go to the dropdown just as we did with Phone #3 and choose the correct item.

And just like that, order records are properly linked again.

Writing Back Contacts – Correcting Data

PHONES			
Phone #1	New	New	DAYTIME 999-999-9999 x ✓
Phone #2	New	New	HOME 111-111-1119 x
Unused phones	+ MOBILE	123-123-1239 x	
	+ WORK	444-444-4449 x	



PHONES			
Phone #1	New	New	DAYTIME 999-999-9999 x ✓
Phone #2	New	New	HOME 111-111-1119 x
Unused phones	+ MOBILE	123-123-1239 x	
	+ WORK	444-444-4449 x	



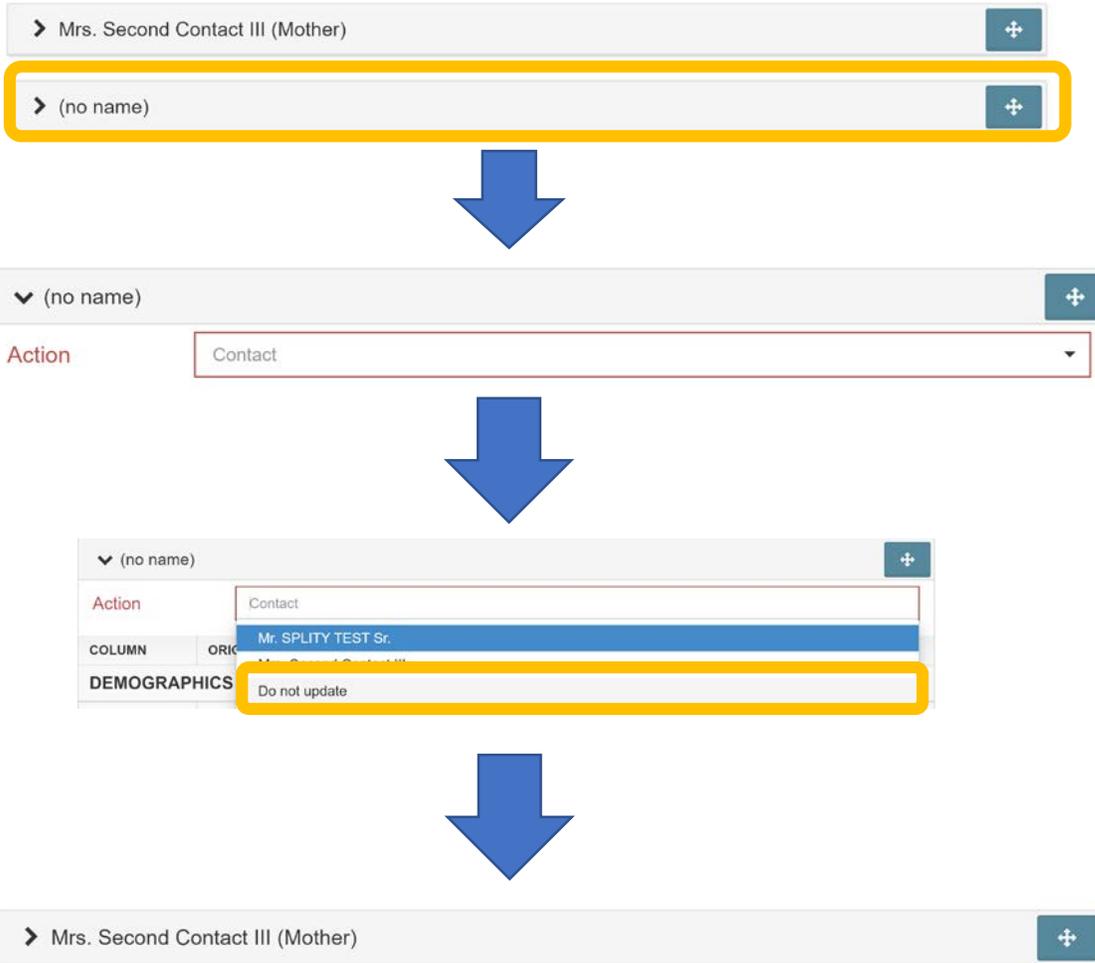
PHONES			
Phone #1	New	New	DAYTIME 999-999-9999 x ✓
Phone #2	New	New	HOME 111-111-1119 x
Phone #3	New	New	MOBILE 123-123-1239 x
Unused phones	+ WORK	444-444-4449 x	

A different scenario that can happen sometimes depending on the data in PowerSchool and changes made, is that you have Unused records that do not appear in the list at all.

If you click on one of the records in this section, it will be added into the list as a new record.

And now that it is there, it will be moved into PowerSchool.

Writing Back Contacts – Correcting Data



When linking Contacts together, if there was a duplicate or incorrect match and you have chosen their match somewhere else, sometimes you can end up with empty records

In this case, to remove the record simply choose Do Not Update from the dropdown

And the empty record will no longer be maintained

Writing Back Contacts – Correcting Data

▼ Mrs. Second Contact III (Mother) +

Action Mrs. Second Contact III

COLUMN	ORIGINAL FORM	POWERSCHOOL	SCHOOLENGAGE
DEMOGRAPHICS			
Name	New	Mr. SPLITY TEST Sr.	Mrs. Second Contact III
Gender	New	M	
Employer	New	Jobs Inc.	



▼ Mrs. Second Contact III (Mother) +

Action Contact

COLUMN	ORIGINAL FORM	POWERSCHOOL	SCHOOLENGAGE
DEMOGRAPHICS			
Name	New	Mr. SPLITY TEST Sr.	Mrs. Second Contact III
Gender	New	M	
Employer	New	Jobs Inc.	

Do not update

Unlink

▼ Mr. SPLITY TEST Sr. (Father) +

Action Mr. SPLITY TEST Sr.

COLUMN	ORIGINAL FORM	POWERSCHOOL	SCHOOLENGAGE
DEMOGRAPHICS			
Name	New	Mr. SPLITY TEST Sr.	Mr. SPLITY TEST Sr.
Gender	New	M	
Employer	New	Jobs Inc.	Jobs Inc.

A very common use case we see is that parents will go in and change the order of Contacts on a form. This is an easy thing to spot during review because the name of the users. This poses a huge problem as the Contacts objects are tied to PowerSchool, meaning you'd be swapping the relationships those users have.

In this case, to correct the record, choose the correct record from the dropdown on both Contacts

Once the names match, the records will now be maintained correctly in PowerSchool.

Writing Back Contacts – Correcting Data Tips

Always make sure to review each contact thoroughly to make sure that Contacts are ordered and linked correctly. Make sure to check Contact names to ensure Guardians did not reorder them.

Make sure to review the data access section – should every user with Data Access actually have it?

Are there duplicates of the same user already in PowerSchool? We can expire or unlink one record, but that doesn't solve the duplication. Always make sure to clean up and consolidate records in PowerSchool before writing back.

If in doubt, check PowerSchool to get a better view.

Questions and Feedback?





SchoolEngage

Thank You!

Feedback and Suggestions:
info@intellimedia.ca

