


Ohio Student Contact Migration for PowerShool (SOES and E-Transcripts users)

Note: This is a one-time process and cannot be re-done. Once this is processed, any new student's information will need to be manually updated for EMIS and transcript purposes.

District>District>Student Contact Conversion

Ohio Student Contact Conversion



▼ Step 1: Map Contact Data

Map contact data to the state contact fields using [Contact Data Mapping Screen](#) the following link.

Mapping Contact Data Is Complete

1 / 4 Next

► Step 2: Populate Validation Screens
► Step 3: Validate Results
► Step 4: Migrate to State Contact Tables

Click on Contact Data Mapping Screen link

Ohio Student Contact Mapping Relationship

Relationship | **Flags** | Contact Fields

New

Mapping Name	Mother	Father	Foster Parent	Grandmother	Grandfather
PS Core Emergency Contacts	Mother	Father		Grandmother	Grandfather

◀ Contact Conversion Steps

Here you'll see the PS Core Emergency Contacts setup already in the relationship tab – you should not have to do anything with these, but you can review them if you like.

Next you have the Flags Tab – you will need to set up in order for this process to complete.

Custodial Flag	Value
Y – Contact has custody rights	<input type="text" value="Y"/>
N – Contact does not have custody rights	<input type="text" value="N"/>
Default if Custodial Flag is null/blank	<input type="text" value="N - No"/>

Enter a Y and a N in each blank box, then change the drop down from N to Y if you want the default value set differently. Do this for all 5 flag sections on this tab.

Lastly we have the Contact Fields Tab

Ohio Student Contact Mapping

Relationship | Flags | Contact Fields

[New](#)

Seq	Description	Relationship	First Name	Last Name	Address
-----	-------------	--------------	------------	-----------	---------

[◀ Contact Conversion Steps](#)

You'll click New to map your contacts from the demographics page and Emergency/Medical PS pages.

We'll show you a couple and you'll end up with something like this when finished with step one:

(Note: this is also based on schools not using any custom contact screens, but the basic PowerSchool screens, with this being said – you should have data in the mother and or father fields and or emergency contact fields if you wish this process to be effective.)

Relationship | Flags | Contact Fields

[New](#)

Seq	Description	Relationship	First Name	Last Name	Address
1	Mother	Mother	Mother	Mother	Street
2	Father	Father	Father	Father	street
3	ec1	Emerg_1_Rel	Emerg_Contact_1	Emerg_Contact_1	
4	ec2	Emerg_2_Rel	Emerg_Contact_2	Emerg_Contact_2	
5	ec3	Emerg_3_Rel	Emerg_Contact_3	Emerg_Contact_3	

[◀ Contact Conversion Steps](#)

Click New to setup and map the first one, for our community school we tested this out on we created and mapped Mother, Father, Emergency Contact 1, 2 and 3. Here is Mother

Contact Setup	
Mapping Description	Mother *
Contact	
Contact Sequence	1 *
Name	
Prefix Name	map
First Name	Not Used *
Middle Name	map
Last Name	Not Used *
<input checked="" type="checkbox"/> Use Last Name, First Name	Mother * map
Suffix Name	map
Demographics	
Gender	map
Employer	Mother_Employer map
Job Title	map
Student Relationship	
Relationship Code	map Mother Only
Custodial Flag	map Default Y Default N
Legal Guardianship Flag	map Default Y Default N
Copy of Correspondence Flag	map Default Y Default N
Emergency Contact Flag	map Default Y Default N
Can Pickup Flag	map Default Y Default N
Contact Note	map

Notice here in the student relationship section – you can also set these values for the Mother contact (you can set these to be different than what you did on the Flags tab earlier if you wish)

Physical Location AddressAddress Line 1 mapAddress Line 2 mapCity mapState/Province Code mapPostal Code mapCounty Code mapCountry Code map**Mailing Address**Address Line 1 mapAddress Line 2 mapCity mapState/Province Code mapPostal Code mapCounty Code mapCountry Code map**Other Home Address**Address Line 1 mapAddress Line 2 mapCity mapState/Province Code mapPostal Code mapCounty Code mapCountry Code map**Phone Numbers**Phone Home map Extension mapPhone Cell map Extension mapPhone Work map Extension mapPhone Other map Extension map**Email**Email Home mapEmail Personal mapEmail Work mapEmail Other map

Here is Emergency Contact 1

Contact Setup			
Mapping Description	<input type="text" value="ec1"/>		*
Contact			
Contact Sequence	<input type="text" value="3"/>		*
Name			
Prefix Name	<input type="text"/>	map	
First Name	<input type="text" value="Not Used"/>		*
Middle Name	<input type="text"/>	map	
Last Name	<input type="text" value="Not Used"/>		*
<input checked="" type="checkbox"/> Use Last Name, First Name	<input type="text" value="Emerg_Contact_1"/>	* map	
Suffix Name	<input type="text"/>	map	
Demographics			
Gender	<input type="text"/>	map	
Employer	<input type="text"/>	map	
Job Title	<input type="text"/>	map	
Student Relationship			
Relationship Code	<input type="text" value="Emerg_1_Rel"/>	map	<input type="text" value="PS Core Emergency Contacts"/>
Custodial Flag	<input type="text"/>	map Default Y Default N	
Legal Guardianship Flag	<input type="text"/>	map Default Y Default N	
Copy of Correspondence Flag	<input type="text"/>	map Default Y Default N	
Emergency Contact Flag	<input type="text"/>	map Default Y Default N	
Can Pickup Flag	<input type="text"/>	map Default Y Default N	
Contact Note	<input type="text"/>	map	

Physical Location Address			
Address Line 1	<input type="text"/>	map	
Address Line 2	<input type="text"/>	map	
City	<input type="text"/>	map	
State/Province Code	<input type="text"/>	map	
Postal Code	<input type="text"/>	map	
County Code	<input type="text"/>	map	
Country Code	<input type="text"/>	map	
Mailing Address			
Address Line 1	<input type="text"/>	map	
Address Line 2	<input type="text"/>	map	
City	<input type="text"/>	map	
State/Province Code	<input type="text"/>	map	
Postal Code	<input type="text"/>	map	
County Code	<input type="text"/>	map	
Country Code	<input type="text"/>	map	
Other Home Address			
Address Line 1	<input type="text"/>	map	
Address Line 2	<input type="text"/>	map	
City	<input type="text"/>	map	
State/Province Code	<input type="text"/>	map	
Postal Code	<input type="text"/>	map	
County Code	<input type="text"/>	map	
Country Code	<input type="text"/>	map	
Phone Numbers			
Phone Home	<input type="text" value="Emerg_Phone_1"/>	map	Extension <input type="text"/> map
Phone Cell	<input type="text"/>	map	Extension <input type="text"/> map
Phone Work	<input type="text"/>	map	Extension <input type="text"/> map
Phone Other	<input type="text"/>	map	Extension <input type="text"/> map
Email			
Email Home	<input type="text"/>	map	
Email Personal	<input type="text"/>	map	
Email Work	<input type="text"/>	map	
Email Other	<input type="text"/>	map	

Once you have created all of your entries – you can click the contact conversion Steps button to proceed to step 2

[◀ Contact Conversion Steps](#)

Step Two – click the Populate Validation Screens button

If you have completed mapping the contact data (Step 1) you can populate the validation screens.

[Populate Validation Screens](#)

Now – you will end up with this part of Step 2 – Now Click Student Contact Validation

Review and merge duplicate contacts using [Student Contact Validation](#) the following link.

Percent complete	0%
Validation Is Complete	Once percent is 100% a checkbox will be available.

At this point – you have two choices Create Individual Contacts or Combine/Edit Contacts.

Student Contact Validation (A)

Filter by Last Name

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 All

Grouped Contacts (0)

Last Name	First Name	Cell Phone	Home Phone	Home Address	Home City
No Grouped Contacts found					

Create Individual Contact(s) Combine/Edit Contact(s)

You'll note above – that you have the alphabet and then All, depending on the size of your school, if you choose to combine/edit contacts – you can either do this by the alphabet for last names of contacts or choose all to begin the process to combine contacts. Combining contacts is an individual process.

For Example – We can click on the W and see we can combine Bruce Wayne's two contact records:

Create Individual Contact(s) Combine/Edit Contact(s)

Ungrouped Contacts (129)

Last Name	First Name	Cell Phone	Home Phone	Home Address	Home City
<input type="checkbox"/>	Wayne	Alfred	419-123-4590		
<input checked="" type="checkbox"/>	Wayne	Bruce	419-123-4589	Wayne Manor Dr.	Gotham
<input checked="" type="checkbox"/>	Wayne	Bruce	419-123-4589		

The first record is the Father contact that we created and mapped the address and so on, the second one is from one of the three Emergency contacts records that we mapped. So if we want to combine these two records, we Check them then click Combine/Edit Contact(s) to combine these two into one:

Select Primary Contact Record ✕

Primary Contact	<input checked="" type="radio"/> (Populate empty fields)	<input type="radio"/>
First Name	Bruce	Bruce
Last Name	Wayne	Wayne
Physical Address 1	Wayne Manor Dr.	
Physical City	Gotham	
Physical State	OH	
Physical Zip	43614	
Physical County	48	
Mailing Address 1	Wayne Manor Dr.	
Mailing City	Gotham	
Mailing State	OH	
Mailing Zip	43614	
Mailing County	48	
Home Phone	419-123-4589	419-123-4589
<i>Student (for reference only)</i>	<i>Wayne, Bruce C</i>	<i>Wayne, Bruce C</i>

Choose which contact record you want as the primary, then click on the Select Primary button. Continue this process for the next set of contact records you want combined.... Once they are combined they get moved up to the top

Filter by Last Name

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 All

Grouped Contacts (1)					
Last Name	First Name	Cell Phone	Home Phone	Home Address	Home City
<input type="checkbox"/> Wayne	Bruce		419-123-4589	Wayne Manor Dr.	Gotham

If you decided to Combine/Edit Contact(s) then you must do this for all – you can't just pick and choose some contacts to combine.

Your other option is to click on the All option at the end of the alphabet, then click on the Create Individual Contact(s) Button.

Filter by Last Name

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 **All**

Grouped Contacts (1)

Last Name	First Name	Cell Phone	Home Phone	Home Address	Home City
<input type="checkbox"/> Wayne	Bruce		419-123-4589	Wayne Manor Dr.	Gotham

[Create Individual Contact\(s\)](#) [Combine/Edit Contact\(s\)](#)

It will create 1000 contacts at a time. Continue this process until all contacts are created.

Create Individual Contacts ✕

Create 1000 Individual Contacts

Once all of your contacts have been created/grouped scroll down and click on the Contact Conversion Steps button to return to the conversion steps.

Ungrouped Contacts (0)

Last Name	First Name	Cell Phone	Home Phone	Home Address	Home City
No more Ungrouped Contacts found!					

[◀ Contact Conversion Steps](#)

Now you are ready for Step 3 so you can Check Validation Is Complete

Review and merge duplicate contacts using [Student Contact Validation](#) the following link.

Percent complete 100%

Validation Is Complete

Once you have finished merging and reviewing:

Now click submit.

✓ The process has completed

The process to move data to the Ohio contact screens has been completed. This process cannot be repeated.

[Go to Ohio Student Contacts](#)

Now you can review your contacts or pull up a student and go to the contacts tab to review.

Remember from here on out – you will manually create these for any new students that enter.