samegoal

Enhanced PowerSchool Demographics Integration

Enhanced PowerSchool Demographics Integration
Original: May 24, 2021
Updated: Dec 20, 2021

> Beginning January 31, 2022, SameGoal's student/parent demographics integration will no longer support Powerschool districts that have not been updated as specified below.

Background: In May 2021, SameGoal's PowerSchool demographics integration was updated in three ways (see below). Beginning January 31, 2022, SameGoal's student/parent demographics integration will no longer support Powerschool districts that have not been updated.

- [REQUIRED UPDATE] **Student enrollment status** - This status is now used throughout the SameGoal application and requires installation of an updated students.powerschool.html file. Learn more
- [REQUIRED UPDATE] **Unlimited Contacts** - Unlimited Contacts is now the preferred method of storing parent/guardian demographics in PowerSchool and requires installation of a uc_guardians.powerschool.html file. Learn more
- [OPTIONAL] **Guardian Flags** - SameGoal integration now allows districts to further configure parents/guardians included in integration. Learn more

---

Student Enrollment Status

Student enrollment status is now used throughout SameGoal to display an enrollment icon next to students with special enrollment statuses and filter inactive students from student search pages and administrative reports by default. Maintaining an up-to-date enrollment status for each student in SameGoal is necessary to ensuring:

- Staff are aware of enrollment changes when writing and referencing program documentation.

- Administrative reports, especially those pertaining to upcoming due dates, do not include unnecessary results for students that have already left the district.

Steps

To updated your existing integration:

1. Download the custom page file below. Right click the link, choose **Save as...**, then save the file to a location of your choosing.

   - **students.powerschool.html** (default custom page for extracting student demographics, recently updated to include "District Enrollment")

2. Login to your PowerSchool Administrator account and locate existing installed custom pages.

   - In the left menu, visit **System** (under **Setup**).
   - On the **System Administrator** page, visit **Page and Data Management**.
   - On the **Page and Data Management** page, visit **Custom Page Management**.
   - In the **Site Structure** pane, expand **admin** then **functions**.

3. Install updated students.powerschool.html.

   - Most districts do not need to customize their students.powerschool.html file. However, if your district made customizations to the currently installed file in the past, these customizations should first be laid into the new students.powerschool.html file prior to replacing it.
   - Right click the installed **students.powerschool.html** file. Select **Delete**.
   - Right click the **functions** folder. Select **Upload**.
     - Click the **Choose File** button and browse to the location of **students.powerschool.html** saved in step 1.
     - Click the **Submit** button.

4. Grant the samegoal account access to your newly installed custom page.

   - Modify your URL bar to visit: **https://[your-powerschool-host]/admin/functions/students.powerschool.html**.
   - Scroll to the bottom.
   - Click the **Modify access privileges for this page** link.
   - Find the samegoal group and select **View-only**.
   - Click **Submit**.

Unlimited Contacts

"Unlimited Contacts" is now the preferred method for storing parent/guardian demographics in PowerSchool. Many districts have now migrated some or all of their parent/guardian Custom Fields to use Unlimited Contacts. Therefore, SameGoal now provides two default custom pages for parent/guardian contacts extraction:

- uc_guardians.powerschool.html (extracts parents/guardians stored as "Unlimited Contacts")
- guardians.powerschool.html (extracts parents/guardians stored as "Custom Fields")

Recommendations:

- If your district has migrated **all** parent/guardian contacts to Unlimited Contacts, we recommend you replace your previously installed guardians.powerschool.html file with uc_guardians.powerschool.html (see steps below).
- If your district has migrated **some** parent/guardian contacts to Unlimited Contacts, we recommend you install uc_guardians.powerschool.html in addition to your previously installed guardians.powerschool.html file (see steps below).
- If your district has not yet migrated any contacts to Unlimited Contacts, no action is needed at this time.

 ♀ Tip If your district previously customized guardians.powerschool.html to limit parents/guardians to those with "Lives With" and/or "Is Custodial" flags in PowerSchool, these customizations can now be removed and addressed with a new Guardian Flags configuration option.

Steps

To updated your existing integration:

1. Download the custom page file below. Right click the link, choose **Save as...**, then save the file to a location of your choosing.

   - **uc_guardians.powerschool.html** (new custom page for extracting parent/guardian demographics stored as Unlimited Contacts)

2. Login to your PowerSchool Administrator account and locate existing installed custom pages.

- In the left menu, visit **System** (under **Setup**).
- On the **System Administrator** page, visit **Page and Data Management**.
- On the **Page and Data Management** page, visit **Custom Page Management**.
- In the **Site Structure** pane, expand **admin** then **functions**.

3. Install uc_guardians.powerschool.html.

- Right click the **functions** folder. Select **Upload**.
    - Click the **Choose File** button and browse to the location of **uc_guardians.powerschool.html** saved in step 1.
    - Click the **Submit** button.
- If your district has migrated **all** parent/guardian Custom Fields to Unlimited Contacts, remove your (Custom Fields based) guardians.powerschool.html file. Also remove guardians{2,3}.powerschool.html if installed.
    - Right click each file. Select **Delete**.

4. Grant the samegoal account access to your newly installed custom page.

- Modify your URL bar to visit: **https://[your-powerschool-host]/admin/functions/uc_guardians.powerschool.html**.
- Scroll to the bottom.
- Click the **Modify access privileges for this page** link.
- Find the samegoal group and select **View-only**.
- Click **Submit**.

Guardian Flags

This new configuration option in SameGoal's web interface can be used to limit parents/guardians included in integration to only those with "Lives With" and/or "Is Custodial" flags in PowerSchool. This option can be used in place of further customizing SameGoal's default custom pages (a simpler, more maintainable approach).

Steps

To updated your existing integration:

1. Login to SameGoal with an administrator account.
2. Visit Settings > District Information > Details.
3. Locate **PowerSchool** under **Student Information System Integration**.
4. Locate **Guardian Flags**. Check **Lives With** and/or **Is Custodial**. If selected, only guardians with these flags will be included in the integration.