

FAMILY MANAGEMENT

Purpose: *Administration* – Instructions on setting up and using the Family Management component to PowerSchool.

Family Management in PowerSchool allows Schools to copy and exchange data between families as well as group family members together regardless of which school they attend in your District. These new features are extremely valuable when entering new students, entering demographic changes, etc.

SETTING UP FAMILY MANAGEMENT (District Setup)

District Administrators must set up the parameters in which Family Management can be applied between the various schools in your District.

From the District School

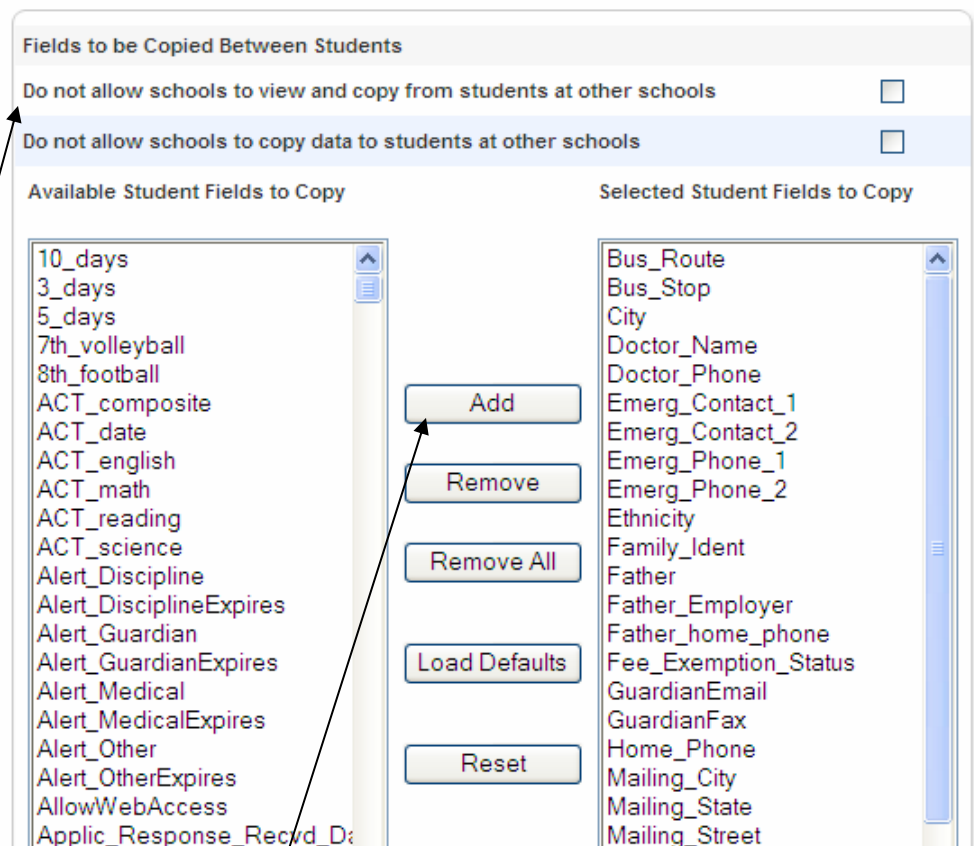
1. Click on the **District Link**
2. Locate and click on **Family Management**

This will bring up the following screen:

On this screen you will set if you DO NOT want your Schools to be allowed to view and copy data from other schools. If this is the case, be sure to check the checkboxes indicating this.

Assuming you wish to allow your schools to copy and view data from other schools, you will then need to

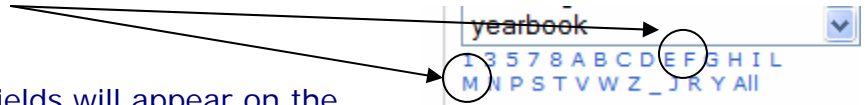
determine which fields you would like to allow schools to copy. You may select a default set of fields or select individual specific fields by either double clicking on the field or highlighting the field and then clicking the **Add** button.





3. When you have made your selections – click the **Submit Button** on the bottom and the settings will be saved and put into production.

NOTE: Two fields that you may wish to include (MotherDayPhone) and (FatherDayPhone) do not seem to appear on the list, but are fields that you would most likely wish to include on your list. You may still access these two fields by clicking on the letter “M” for Mother and “F” for Father in the ledger listed on the lower left hand side of the screen.



By clicking on the correct letter, these fields will appear on the list.

ENROLLING A NEW STUDENT INVOLVING FAMILY MANAGEMENT (School Level)

When enrolling new students to your school, it may be possible that the student has siblings enrolled in your District and much of the family demographic information has already been entered. As mentioned above, regardless of which building these students are enrolled in, you should be able to copy this information over to your student's record and create a relationship between them.

To enter a new student involving Family Management:

1. From the School Start Page – **Select Special Functions**
2. Select **Enroll New Student**
3. You must enter at least:
 - a. Student Name
 - b. Enrollment Date
 - c. Full Time Equivalency
 - d. Entry Code
 - e. Grade Level
 - f. District of Residence

At the bottom of the screen, you will see a new addition to the screen allowing you to search for Family Matches. Your screen should look like this:



- Be sure the Search for Family Members to Link to and Copy information from is checked.

- Our recommendation is to leave the rest of the screen blank and make sure the Include Student's Last Name in Search is CHECKED (assuming you believe all of the students from the family share the last name – if you know otherwise, then remove the check box saying to include the name and rely on the other fields)

Information for Family Match

Students may be linked to other family members in the school or district and their demographic information may be copied to the student being enrolled. By creating a link between students, shared information can be synchronized so edits that occur to one student can automatically be made to the linked students.

Enroll without Linking or Copying Information
 Search For Family Members to Link to and Copy Information from

Family ID

Mother's Name

Father's Name

Guardian's Name

Address (Street, City)

Sibling's Name (Last, First)

Include Student's Last Name (Beedy)In Search.

Submit

NOTE: By leaving all other search criteria blank, the software will look for any and all students that share the last name of the student you are enrolling. **In those cases where students live together but do not share the same Last Name, you may wish to include fields such as Father's Name, Mother's Name, etc.** If including these fields, be sure to enter the information in the correct format of Neilly, Bob for example.

- Clicking **Submit** will display the list of all students who match the selection criteria.
- Verify that the student you are trying to enroll is not on the list – **assuming they are not, click ENROLL.**

The New Family Management functions now come in to play

The software will display any and all students **from across the District** that matches the selection criteria. It will display their demographic information in a grid on your screen, similar to the one below:



The following list of students represent those who matched all or some of the search criteria and may possibly be family members of the current student. To use one of the listed students as a source to copy demographic, guardian and emergency contact information from the select the appropriate "Copy" radio button. To establish a family link between the student enrolled and any of the students listed below, check the "Link" checkbox. The system will establish a link between them and keep their common family information synchronized.

Copy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Related	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student Name	Neilly, Bobby	Neilly, Brad R	Neilly, Brittany	Neilly, Francis	Neilly, Jeff	Neilly, Joseph L	Neilly, Kate	Neilly, Laura J	Neilly, Patrick J	Neilly, Summer
Student Number	35276	35158	35159	35269	35285	35160	35284	35155	35154	35222
School	Cherry Hill Middle School (6)	Apple Grove High School (10)	Apple Grove High School (10)	Apple Grove High School (9)	Washington Elementary (2)	Apple Grove High School (10)	Apple Grove High School (9)	Apple Grove High School (10)	Apple Grove High School (10)	Apple Grove High School (9)
Enroll Status	Enrolled	Enrolled	Enrolled	Enrolled	Enrolled	Enrolled	Enrolled	Enrolled	Enrolled	Enrolled
Family ID										
Sibling Last Name	Neilly	Neilly	Neilly	Neilly	Neilly	Neilly	Neilly	Neilly	Neilly	Neilly
Sibling First Name	Bobby	Brad	Brittany	Francis	Jeff	Joseph	Kate	Laura	Patrick	Summer
Student Phone	111-111-1111	(319) 373-1000	(319) 373-1000	319 399-5543	(319) 373-1000	373-1000	(319) 373-1000	(319) 373-1000	(319) 373-1000	111-111-1111
Physical Address		2420 26th Ave	2420 26th Ave	450 Georgia Dr	2420 26th Ave	2420 26th Ave	2420 26th Ave	2420 26th Ave	2420 26th Ave	
Mailing Address		2420 26th Ave	2420 26th Ave		2420 26th Ave	2420 26th Ave	2420 26th Ave	2420 26th Ave	2420 26th Ave	

Additional fields are also display on the grid as well.

NOTE: While all of the Students displayed above may share the same last name, it does not necessarily mean they are related to one another.

You will need to determine two things:

- For EACH student that is Related to the student you are enrolling, then click on the Related box near the top. This will connect them all as Family Members
- Determine the ONE student that appears to have the most complete (assuming everything is accurate) information and check the COPY box above that student's name.

8. Click **SUBMIT** at the bottom of the screen and the family demographic information from that student will be copied to the new student, assuring the same data is entered and saving you data entry time.



CHANGING DEMOGRAPHIC INFORMATION

When editing demographic information (which would include anything on the approved shared field list), the software will locate any and all records that contain that same data. Just as in the Family Grid above, these students will be displayed, allowing you to Copy the information to their records as well. You will need to determine which students should have their record updated and which should not.

Once you have selected the students to update:

9. Click **submit** and the information should be updated appropriately.

Clicking on the Family link – should display all Family Members.