

Historical Enrollment Tracking User Guide

PowerSchool 9.x
Student Information System

Released 9.2.4.3

Document Owner: Documentation Services

This edition applies to Release 9.2.4.3 of the [product name] software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

PowerSchool is a trademark, in the U.S. and/or other countries, of PowerSchool Group, LLC or its affiliate(s).

Copyright © 2005-2016 PowerSchool Group LLC and/or its affiliate(s). All rights reserved.

All trademarks are either owned or licensed by PowerSchool Group LLC and/or its affiliates.

Contents

- Setup the Primary Registrar Contact Information4
 - How to Specify Registrar Contact Information.....4
- Locate Duplicate Student Records4
 - How to Locate Duplicate Student Records4
- Transfer Information.....9
 - How to View Transfer Information.....9
 - How to Edit Enrollment Information9
 - How to Add a Transfer Code..... 11
 - How to Edit a Transfer Code 11
 - How to Delete a Transfer Code 12
- Transfer Student Record..... 12
 - How to Set Transfer Student Record Setting..... 13
 - How to Transfer Student Record..... 13

Setup the Primary Registrar Contact Information

Enter contact information for the primary registrar contact that will appear when an administrator at a different school attempts to enroll a student who is already enrolled at your school.

How to Specify Registrar Contact Information

1. On the start page, choose **District** from the main menu. The District Setup page appears.
2. Under General, click **Schools/School Info**. The Schools/School Info page appears.
3. Under School Administration Information, enter the **Name**, **Phone Number**, and **Email Address** for the primary registrar contact.
4. In the **Notes** field, add any pertinent information you want to communicate to the other school administrator. For example, you can enter the registrar's work schedule, alternate contact information, etc.
5. Click **Submit**.

Locate Duplicate Student Records

When enrolling a new student, if a student record exists at a different district, PowerSchool will display possible matching records. You can review a list of these records and select the applicable record to retrieve and import data from the other district.

How to Locate Duplicate Student Records

1. On the start page, click **Enroll New Student**. The Enroll New Student page appears.
2. Use the following table to enter information in the Student Information section:

Field	Description
Student's Name (Last, First MI)	Enter the student's name (last, first, then middle initial or name). Names that include spaces (such as Mary Jo) can be included in any of the three fields. The maximum number of characters and spaces is 20 for the last name field, 20 for the first name field, and 15 for the middle name field.

Field	Description
DOB	<p>Enter the student's date of birth using the format mm/dd/yyyy or mm-dd-yyyy. If you enter a date of birth, students with the same name and the same date of birth will appear as potential duplicate student records. If you enter a date of birth that does not match any existing student records with the same name, the new enrollment will not be considered a potential duplicate.</p> <p>If you do not enter a date of birth, only the Name, Phone Number, and Social Security Number fields are considered when checking for duplicate students.</p>
Student Number	<p>If available, enter the student number. If you leave this blank, one will be assigned to the student. If the student has already been assigned a student number, that number will be used in place of the one entered here. The Student Number and State Student ID are the same number.</p>
Gender	<p>Select the student gender from the pop-up menu.</p>
Social Security Number	<p>Enter the student's Social Security number.</p>
Phone Number	<p>Enter the student's phone number.</p>
Enrollment Date	<p>If it is not the date displayed, enter the student enrollment date using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.</p>
Full-Time Equivalency	<p>TBD</p>
Grade Level	<p>Choose the grade level the student will be in when he or she enters your school from the pop-up menu.</p>
Entry Code	<p>Choose the reason the student is entering your school from the pop-up menu.</p>
Track	<p>Choose the student's track from the pop-up menu.</p> <p>Note: For more information, see <i>Calendar Setup</i>.</p>

Field	Description
District of Residence	<p>Choose the district in which the student lives from the pop-up menu.</p> <p>If you have the appropriate permissions, you can click District of Residence to access the Districts of Residence page.</p> <p>Note: For more information, see <i>Districts of Residence</i>.</p>
Fee Exemption Status	<p>Choose the student's fee exemption status from the pop-up menu in the School Fee Information section:</p> <ul style="list-style-type: none"> • Student not Exempted • Student Exempted from Course Fees • Student Exempted from School Fees • Student Exempted from All Fees <p>School and course enrollment fees are automatically assigned to students when they enroll in school or in a course. Students can be exempted individually from having these fees assigned to them automatically by using the Fee Exemption Status pop-up menu. While you can indicate to the system that school and/or course enrollment fees are not to be assigned automatically, this does not prohibit fees being assigned manually.</p> <p>Note: For information about exempting a group of students, see <i>School Information</i>.</p>
School	The school in which you are enrolling the student.

3. Use the following table to enter information in the Information for Family Match section:

Field	Description
Enroll without Linking or Copying Information	Select this option to skip all linking and copying functions. All other standard enrollment functions occur when you click Submit . Use for students with no known siblings in the district.
Search for Family Members to Link to	Select this option to initiate a search for potential family members from which shared data can be copied when you

Field	Description
and Copy Information From	<p>click Submit.</p> <p>Note: The search for siblings performs an “or” search. Students with active or inactive status who match any of the search criteria display on the search results page as a potential sibling. For example, if you enter the mother’s name along with the street address, a student who has the same mother’s name or the same street address displays on the resulting search page.</p>
Family ID	<p>Enter the family ID, if applicable.</p> <p>Note: This field is provided only for districts and schools that used it previously to associate related students. Family management functionality is based upon relationships stored in the Relationships table.</p>
Mother’s Name	Name of the enrolling student’s mother.
Father’s Name	Name of the enrolling student’s father.
Guardian’s Name	Name of the enrolling student’s guardian.
Sibling’s Name (Last, First)	<p>Name of a sibling who is also a student within the district. There are two separate fields since a student’s name is stored as unique fields for last name and first name.</p>
Include Student’s Last Name in Search	<p>Select the checkbox to include the last name of the enrolling student in the family match search. All students who share the same last name will be included in the search results.</p>
Street, Apt/Suite	<p>Enter the street address in the first field, and apartment or suite number in the second field, if any.</p>
City, State, Zip	Enter the city, state, and zip code for the street address.
Geocode	<p>The latitude/longitude pair that represents the geographical location of the home address. This field is read-only and is automatically generated when the address is validated or imported. For more information about geocodes, see <i>Address Management</i>.</p> <p>Click Validate to perform address validation. For more information about performing address validation, see</p>

Field	Description
	<i>Perform Interactive Address Validation.</i>

4. Click **Submit**. PowerSchool searches for duplicate student records.

No Matching Records

1. If there are no records matching that of the new student, the Check for Existing Students page appears, and a new Student ID is generated.
2. Click **Next**. You can then add classes to the student's schedule. For more information, see *Add Section Enrollments*.

Exact Record Match

1. If there is an exact match to the new record you are creating, the Check for Existing Students page appears. A message displays that an exact match was found.
2. Click **Next**.

Note: If the student record already exists in your system, an alert appears informing you that the student has an existing record in the district. Transfer the student record to the correct school.

Partial Record Match

1. If there is a partial match to the new record you are creating, the Check for Existing Students page appears. Student records that matched some of the data you entered appear.
2. Determine if an existing record that displays is a match to the record you are entering. If so, click the button next to the correct record. If no record matches, click **No Match, New Enrollment**.
3. Click **Next**.

Record Found at Different School

- If the record is found at another school in your district for which you have access to PowerSchool, the student record opens in their current school in order for you to transfer the student to the correct school.
- If the record is found at a school in your district for which you do not have access, a message appears. Contact the registrar at the school and request that the student be transferred to the correct school.

Transfer Information

This page displays the student's history of transfers into and out of your school. Use the Transfer Info function for viewing or editing information that was previously entered through the Functions page. Do not use this page to transfer a student. For instructions on transferring students, see *Transfer Students* in the PowerSchool Help or the *Students User Guide for PowerSchool* available on PowerSource.

You can add, edit, or delete entry codes and exit codes from the student pages menu. For more information about an alternative method for adding, editing, or deleting these codes, see *Entry Codes* and *Exit Codes*. You can also edit the options in the District of Residence pop-up menu. For more information, see *Districts of Residence*.

How to View Transfer Information

1. On the start page, search for and select a student. For more information, see *Search and Select*.
2. Under Enrollment, choose **Transfer Info** from the student pages menu. The Transfer Information page appears.

The resulting page displays the student's current enrollment information at the top. The student's previous enrollment information appears next. The columns show the date the student entered a school, an exit date if the student left, the student's grade level when the transfer occurred, any entry or exit comments made by the administrator who completed the transfer, and the school from which the student exited. If a blank chart appears on the page, the selected student has not transferred into or out of your school.

On the Previous Enrollments section of the page, the district/school name appears whenever the record is from a district outside of the current district.

How to Edit Enrollment Information

Perform this action to change the enrollment record of an individual student.

1. On the start page, search for and select a student. For more information, see *Search and Select*.
2. Under Enrollment, choose **Transfer Info** from the student pages menu. The Transfer Information page appears.
3. Click the entry date of the record you want to edit. The Edit Current Enrollment or Edit Previous Enrollment page appears.
4. Use the following table to enter information in the fields:

Note: Fields vary slightly from the Edit Current Enrollment to the Edit Previous Enrollment page.

Field	Description
Entry Date	Enter the date the student was enrolled using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Entry Code	Choose a reason for the transfer from the pop-up menu.
Entry Comment	Enter any comments related to the entry transfer.
Exit Date	Enter the exit date, which is the first day the student's enrollment is not active or the day after the student transferred out. Use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Exit Code	Choose a reason for the transfer from the pop-up menu.
Exit Comment	Enter any comments related to the exit transfer.
Full-Time Equivalency	FTE is a grouping that associates a student's school enrollment with a set of attendance conversion values. When ADA runs, for a student, it runs for each school enrollment during the report dates. When processing each school enrollment, it uses the student's FTE to locate the set of attendance conversions to use when looking up the attendance value for the day. For more information, see <i>Full-Time Equivalencies</i> . Choose the student's FTE from the pop-up menu for this school enrollment.
Grade Level	Choose the student's grade level at the time of the transfer from the pop-up menu.
Track	Choose the student's track from the pop-up menu. For more information, see <i>Calendar Setup</i> .
District of Residence	Choose the district in which the student lives from the pop-up menu. For more information, see <i>Districts of Residence</i> .

5. Click **Submit**. The Changes Recorded page appears.

Note: When you edit an enrollment record, the enrollment is validated before saving. An alert appears if there are any problems, such as blank field values.

How to Add a Transfer Code

Create a new entry or exit code on the PowerSchool system. Anyone who manages student transfers can apply this code to any student.

1. On the start page, search for and select a student. For more information, see *Search and Select*.
2. Under Enrollment, choose **Transfer Info** from the student pages menu. The Transfer Information page appears.
3. Click the entry date of any record. The Edit Current Enrollment or Edit Previous Enrollment page appears.
4. Click **Entry Code** or **Exit Code**, depending on your needs. The Entry Codes or Exit Codes page appears.
5. Click **New**. The Edit Entry Codes or Edit Exit Codes page appears.
6. Use the following table to enter information in the fields:

Field	Description
Code	Enter the code.
Meaning	Enter a description of the code.
Sort Order	Enter the sort order of the exit code as it appears in pop-up menu on the student pages.

7. Click **Submit**. The Entry Codes or Exit Codes page displays the new code and its meaning. Any authorized user can apply the new code to any student transferring into or out of your school.

How to Edit a Transfer Code

Any changes you make to a code will affect everyone who manages transfers. You may want to discuss changes with other users before making them.

1. On the start page, search for and select a student. For more information, see *Search and Select*.
2. Under Enrollment, choose **Transfer Info** from the student pages menu. The Transfer Information page appears.

3. Click the entry date of any record. The Edit Current Enrollment or Edit Previous Enrollment page appears.
4. Click **Entry Code** or **Exit Code**, depending on your needs. The Entry Codes or Exit Codes page appears.
5. Click the code or the meaning of the code you want to edit. The Edit Entry Codes or Edit Exit Codes page appears.
6. Edit the information as needed. For field descriptions, see *How to Add a Transfer Code*.
7. Click **Submit**. The Entry Codes or Exit Codes page displays the edited code and its meaning. Any authorized user can apply the edited code to any student transferring into or out of your school.

How to Delete a Transfer Code

Any changes you make to a code affects everyone who manages transfers. You may want to discuss changes with other users before making them. For information about deleting transfer information for previous student enrollments, see *Delete Enrollment Records*.

1. On the start page, search for and select a student. For more information, see *Search and Select*.
2. Under Enrollment, choose **Transfer Info** from the student pages menu. The Transfer Information page appears.
3. Click the entry date of any record. The Edit Current Enrollment or Edit Previous Enrollment page appears.
4. Click **Entry Code** or **Exit Code**, depending on your needs. The Entry Codes or Exit Codes page appears.
5. Click the code or the meaning of the code you want to delete. The Edit Entry Codes or Edit Exit Codes page appears.
6. Click **Delete**.
7. Click **Confirm Delete**. The Selection Delete page appears.

Transfer Student Record

Import a student record from a different school.

If the student record is still actively enrolled at the previous school, or the next school indicator is set at the previous school, you will not be able to import the record. The previous school's Registrar information will display in order for you to contact the school and request that the student record be release from their school.

How to Set Transfer Student Record Setting

Edit the permissions of staff members in order to access the Transfer Student Record screen. This procedure adds and removes the Transfer Student Record link from the navigation menu when working with a student record. Use page permissions to ensure that this function is only available to authorized users. For more information, see the PowerSchool Help or the *Security User Guide for PowerSchool*, available on PowerSource.

1. On the start page, choose **System** from the main menu. The System Administrator page appears.
2. Click **Security**. The Security page appears.
3. Click **Groups**. The Groups page appears.
4. To narrow the list of groups, enter one of more search terms in the **Filter** field. Otherwise, leave blank.
5. Click a name in the Group Name column. The Edit Group page appears.
6. Scroll to the Accessible Student Screens section, and select the **Transfer Student Record** checkbox.
7. Click **Submit**.

How to Transfer Student Record

Import the student record from a different school. No existing data elements will be overwritten. You may delete any existing data items and re-import to have the data import from the previous district record. Individual Historical Grades, Test Scores, Vaccinations, and Award records are imported as long as no duplicates are found. For Awards and other Custom Tables, records are considered duplicate if all fields are identical. Vaccines are considered duplicate if the Vaccine Name and Dose Number match. Test Scores are considered duplicate if the Test Name and Test Date Administered match existing data.

1. On the start page, search for and select the student.
2. Under Enrollment on the main menu, click **Transfer Student Record**. The Transfer Student Record page appears.
3. Click **Continue**. The Student Record Transfer Results page appears indicating the transfer has been requested and that you will be notified when the data has been received.

When the data has been received, the number of notifications next to the Notifications button in the the navigation toolbar at the top of the start page appears updated.

4. Click the button (an exclamation point) to access the Notifications pop-up. The Notifications pop-up appears.
5. Note the Student Transfer message.

6. Click the notification. The Student Record Transfer Results page appears:

Note: When the Student Record Transfer Results page loads, the Student Record Transfer Results Summary record is deleted and no longer appears as a notification.

- If the import is successful, the page displays an Import Succeeded message, and lists the number of records imported, along with any individual fields that did not import.
- If the import was not successful, an error message appears. Following the on screen instructions to rectify.