

PowerSchool Demographics Integration

Updated setup instructions available [here](#).

This integration imports student and parent demographics nightly from PowerSchool.

Steps *To setup demographics integration with PowerSchool:*

Tip You will need access to a PowerSchool Administrator account to setup this integration.

1. Download custom pages
2. Install custom pages
3. Create a SameGoal PowerSchool account
4. Enter PowerSchool information in SameGoal
5. Test

1. Download custom pages

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


- **[students.powerschool.html](#)**
- **[uc_guardians.powerschool.html](#)**

Tip [uc_guardians.powerschool.html](#) extracts parent/guardian contacts stored as Unlimited Contacts in PowerSchool. If your district has not migrated all parent/guardian Custom Fields to Unlimited Contacts, also download [guardians.powerschool.html](#). This file extracts parent/guardian contacts stored as Custom Fields in PowerSchool and requires additional customization for your district. If your district already has a customized [guardians.powerschool.html](#) file installed in PowerSchool, leave this file installed (in addition to [uc_guardians.powerschool.html](#)) until all parent/guardian Custom Fields have been migrated to Unlimited Contacts.

2. Install custom pages

Login to your PowerSchool Administrator account.

- 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**.
- 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.
- Repeat these steps for **uc_guardians.powerschool.html**.

 **Tip** If your district has not yet migrated all parent/guardian Custom Fields to Unlimited Contacts, repeat these steps for your customized guardians.powerschool.html file.

3. Create a SameGoal PowerSchool account

SameGoal uses an account with minimal access privileges to automatically log into PowerSchool nightly and retrieve a fresh copy of basic demographic information generated via these custom pages.

Login to your PowerSchool Administrator account.

(a) Create samegoal group

- In the left menu, visit **System**.
- On the System Administrator page, visit **Security**.
- Visit **Access to Page Permissions**.
 - In the **Turn modify permissions** dropdown, select **On**. Click **Submit**.
 - You will be redirected to the **Security** page.
- On the **Security** page, visit **Groups**. Click the **Add Groups** button in the top right. This page is optimized for adding multiple groups, but we only require one. Enter
 - Number of groups to add: *1*
 - Prefix group names with: *samegoal*
 - Group name preview will show group name of **samegoal** with a number (we will change later). Click **Submit**.

- You will be redirected to the **Groups** page.
- On the **Groups** page, use the **Filter** to search for the group you added. When located, click it.
- On the **Edit Group** page, set
 - Group Name: *samegoal* (remove numbers)
 - Access Level: *No Access*
 - Can Modify Schedules: *No, not at all*
 - Uncheck any other options or set them to **No Access** on this page.
 - Scroll to the bottom of the page and click **Submit**.

(b) Create samegoal user account

- In the left menu, visit **New Staff Entry**.
- On the **New Staff Member** page, enter
 - Name (Last): goal
 - Name (First): same
 - ID: samegoal
 - Click **Submit**.
- Click **goal, same** user account.
- In the left menu, visit **Security Settings**
- Visit the **Admin Access and Roles** tab.
 - Sign in to Administrative Portion of PowerSchool: *check*
 - Admin Username: *enter username of your choosing*
 - Admin Password: *enter password of your choosing*
 - Default Group: *samegoal*
 - Roles and Schools: *add **Home School** and **District Office***
 - Click **Submit**.

(c) Grant samegoal account access to custom pages

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**.

Repeat steps for: **https://[your-powerschool-host]/admin/functions/uc_guardians.powerschool.html**

Tip If your district has not yet migrated all parent/guardian Custom Fields to Unlimited Contacts, repeat these steps for your customized guardians.powerschool.html file.

Tip Custom page may take a long time to load.

Tip If the **Modify access privileges for this page** link does not display, changes to **Access to Page Permissions** in (a) may not have had time to propagate. Recheck this access permission was set to **On** and/or wait for it to take effect.

4. Enter PowerSchool information in SameGoal

If you do not have a SameGoal admin account, email tier2help@samegoal.com the following information:

- Admin URL: *URL of your district Powerschool Administrator instance (eg: <https://district.powerschool.com/admin/>)*
- Username: *username from previous step*
- Password: *password from previous step*
- Guardian Flags: Whether guardians should be limited to those with "Lives With" or "Is Custodial" flags in PowerSchool.

If you have a SameGoal admin account:

- Login to SameGoal using an admin account.
- Navigate to **Settings > District Information > Details**.
- Under **PowerSchool**, enter the above information.
- Click the **Save** button.

Tip Only encrypted (HTTPS/SSL) admin URLs are allowed.

5. Test

Tip It may take up to 24 hours after PowerSchool information has been entered in SameGoal for the demographics integration to run (and for students/guardians to appear in the SameGoal web interface). If you would like to trigger a faster run for the purposes of debugging, email tier2help@samegoal.com.

Expected results: After the integration has run successfully, student and parent demographics of enrolled students will populate SameGoal. After the integration has run

successfully at least once, ask your staff or tier2help@samegoal.com to inspect a handful of students in SameGoal. If the integration does not succeed:

- Verify you can login using the Admin URL, username and password entered in SameGoal.
- While logged in, verify you can visit both URLs below. Each page should generate demographic information without error:
 - **[https://\[your-powerschool-host\]/admin/functions/students.powerschool.html](https://[your-powerschool-host]/admin/functions/students.powerschool.html)**
 - **[https://\[your-powerschool-host\]/admin/functions/uc_guardians.powerschool.html](https://[your-powerschool-host]/admin/functions/uc_guardians.powerschool.html)**
- If either page cannot be accessed, recheck Step 3 (especially 3c) was completed.
- If none of the above points to the source of the error, the issue may be data-specific. Contact tier2help@samegoal.com for assistance debugging.