Federal Ethnicity and Race Management User Guide

PowerSchool 8.x
Student Information System

Contents

Preface

Use this guide to assist you while navigating PowerSchool. This guide is based on the PowerSchool online help, which you can also use to learn the PowerSchool Student Information System (SIS) and to serve as a reference.

The PowerSchool online help is updated as PowerSchool is updated. Not all versions of the PowerSchool online help are available in a printable guide. For the most up-to-date information, click **Help** on any page in PowerSchool.

Referenced Sections

This guide is based on the PowerSchool online help, and may include references to sections that are not contained within the guide. See the PowerSchool online help for the referenced section.

Security Permissions

Depending on your security permissions, only certain procedures may be available to you.

Navigation

This guide uses the > symbol to move down a menu path. If instructed to "Click **File > New > Window**," begin by clicking **File** on the menu bar. Then, click **New** and **Window**. The option noted after the > symbol will always be on the menu that results from your previous selection.

Notes

It is easy to identify notes because they are prefaced by the text "**Note:**."

Introduction

With the introduction of Federal Ethnicity and Race Management, PowerSchool now provides a tool to assist your school district with collecting individual student and staff level ethnicity and race data, and in reporting aggregated data as required by the new Federal Ethnicity and Race Categories from the U.S. Department of Education.

Note: The legacy ethnicity fields used in scheduling and preconfigured (non state-specific) system reports have been renamed **Scheduling/Reporting Ethnicity** for students and **Reporting Ethnicity** for staff. Please continue to populate these fields for the purpose of scheduling and generating preconfigured system reports. For more information, see *Scheduling/Reporting Ethnicity Codes.*

State Reporting Setup

Refer to your state-specific Tech Notes available on **PowerSource** for information on state-specific federal ethnicity and race setup based upon each state's requirements. Setup templates have been provided for states that have finalized requirements for the reporting of federal ethnicity and race information. PowerSchool state-specific reports will use setup information to report federal ethnicity and race information for students and/or staff members as required by your state. If your state has not provided final requirements on the reporting of federal ethnicity and race, templates will not be provided and it is recommended that you do not set up federal ethnicity and race at this time.

Before setting up federal ethnicity and race settings, you must read the *[Your State] District Setup of Federal Ethnicity and Race Settings* article, available on **PowerSource** by navigating to **Home > PowerSchool > Knowledgebase > State-Specific Reporting > [Your State] > Solutions & Resources**.

Federal Ethnicity

As the first part of a two-part question that appears on the student General Demographics page and the staff Edit Information page, students and staff members are asked to choose an ethnicity (Hispanic or Latino or not Hispanic or Latino).

Enable/Disable the Ethnicity Decline to Specify Setting

Using the Ethnicity Decline to Specify setting, you can indicate whether or not you want to permit students and staff members to be able to decline specifying their ethnicity.

Note: For state-specific information, see PowerSchool recommended state-specific setup of federal race and ethnicity settings available on **PowerSource**.

How to Enable/Disable the Ethnicity Decline to Specify Setting

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Federal Ethnicity and Race Settings**. The Federal Ethnicity and Race Settings page appears.
3. Do one of the following:

   - Select the Ethnicity Decline to Specify **Allow / Label** checkbox to include an option on permitting students and staff members to decline specifying their ethnicity and then enter the text that you want to appear next to the option. As an example, the text **Decline to Specify Ethnicity** appears the first time you navigate to this page.
   - Deselect the Ethnicity Decline to Specify **Allow / Label** checkbox to not include an option permitting students and staff members to decline specifying their ethnicity.

4. Click **Submit**. The Federal Ethnicity and Race Settings page refreshes.

Federal Race Categories

As the second part of a two-part question that appears on the student General Demographics page and the staff Edit Information page, students and staff members may be asked to choose one or more races, such as:

- (A) Asian
- (B) Black or African American
- (I) American Indian or Alaska Native
- (P) Native Hawaiian or Other Pacific Islander
- (W) White

Federal race categories must either be imported or manually entered. Once federal race categories are defined, indicate the sort order in which you want each federal race category to display relative to other federal race categories.

Note: For state-specific information, see PowerSchool recommended state-specific setup of federal race and ethnicity settings available on **PowerSource**.

Import Federal Race Categories

During the initial setup of federal ethnicity and race, use the Quick Import function to transfer federal race categories into the PowerSchool Federal Race Categories table. The import file must include the following columns: Name (FederalCode), Value (Description), and SortOrder. For general information, see *Quick Import*. For state-specific information, see PowerSchool recommended state-specific setup of federal race and ethnicity settings available on **PowerSource**.

Note: When importing federal ethnicity and race settings and data into PowerSchool, it is important to perform the imports in the following order: Federal Race Categories, Race Codes, Student Races, and then Teacher Races.

Add a Federal Race Category

Use the following procedure to create new federal race categories.

How to Add a Federal Race Category

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Federal Ethnicity and Race Settings**. The Federal Ethnicity and Race Settings page appears.
3. Under Federal Race Categories, click **New**. The Edit Federal Race Category page appears.
4. Use the following table to enter information in the fields:

Field	Description

Field	Description
Code	Enter the federal race category code, such as A.
Description	Enter a description of the federal race category code, such as (A) Asian.

5. Click **Submit**. The Federal Ethnicity and Race Settings page displays the new federal race category

Sort Federal Race Categories

Use the following procedure to indicate the order in which you want each federal race category to display relative to other federal race categories. The lower the sort order number, the higher the federal race category appears in the Race section of the student General Demographics or staff Edit Information page. Federal race categories that have only one district race code associated to them appear higher than federal race categories that have multiple district race codes.

Note: You can use 0 or negative numbers, such as -1, to precede other entries. If two items have the same sort order number, the first one created precedes the other.

How to Sort Federal Race Categories

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Federal Ethnicity and Race Settings**. The Federal Ethnicity and Race Settings page appears.
3. Enter a number in the respective **Sort** fields.
4. Click **Submit**. The Federal Ethnicity and Race Settings page refreshes.

Edit a Federal Race Category

Use the following procedure to edit existing federal race categories.

How to Edit a Federal Race Category

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Federal Ethnicity and Race Settings**. The Federal Ethnicity and Race Settings page appears.
3. Under Federal Race Categories, click the code or description of the federal race category you want to edit. The Edit Federal Race Category page appears.
4. Edit the information as needed. For field descriptions, see *How to Add a Federal Race Category*.
5. Click **Submit**. The Federal Ethnicity and Race Settings page displays the edited federal race category.

Delete a Federal Race Category

Use the following procedure to delete existing federal race categories.

How to Delete a Federal Race Category

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Federal Ethnicity and Race Settings**. The Federal Ethnicity and Race Settings page appears.
3. Under Federal Race Categories, click the code or description of the federal race category you want to delete. The Edit Federal Race Category page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Enable/Disable the Race Decline to Specify Setting

Using the Race Decline to Specify setting, indicate whether or not you want to permit students and staff members to be able to decline specifying their race.

How to Enable/Disable the Race Decline to Specify Setting

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Federal Ethnicity and Race Settings**. The Federal Ethnicity and Race Settings page appears.
3. Do one of the following:

   - Select the Race Decline to Specify **Allow / Label** checkbox to include an option on permitting students and staff members to decline specifying their race and then enter the text that you want to appear next to the option. As an example, the text **Decline to Specify Race** appears the first time you navigate to this page.
   - Deselect the Race Decline to Specify **Allow / Label** checkbox to not include an option permitting students and staff members to decline specifying their race.

4. Click **Submit**. The Federal Ethnicity and Race Settings page refreshes.

District Race Codes

In order for a federal race category to appear on the student General Demographics page and the staff Edit Information page, at least one district race code must be defined for that federal race category. For example, if the federal race category of (A) Asian is defined, the district race code of (A) Asian must also be defined. If multiple district race codes are defined within a single federal race category, they will appear grouped together on the student General Demographics page and the staff Edit Information page. If no district race codes are defined within a particular federal race category, that category will not appear on the student General Demographics page and the staff Edit Information page.

District race codes may be imported when importing federal race categories or they can be manually entered. Once district race codes are defined, indicate the sort order in which you want each district race code to display relative to other district race codes for a given federal ethnicity category.

Note: For state-specific information, see PowerSchool recommended state-specific setup of federal race and ethnicity settings available on **PowerSource**.

Import District Race Codes

During the initial setup of federal ethnicity and race, use the Quick Import function to transfer district race codes into the PowerSchool Race Codes table. The import file must include the following columns: Name (RaceCode), Value (FederalCode), ValueT (Description), Value2 (AltRaceCode), and SortOrder. For general information, see *Quick Import*. For state-specific information, see PowerSchool recommended state-specific setup of federal race and ethnicity settings available on **PowerSource**.

Note: When importing federal ethnicity and race settings and data into PowerSchool, it is important to perform the imports in the following order: Federal Race Categories, Race Codes, Student Races, and then Teacher Races.

Add a District Race Code

Use the following procedure to create new district race codes.

How to Add a District Race Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Federal Ethnicity and Race Settings**. The Federal Ethnicity and Race Settings page appears.
3. Under District Race Codes, click **New**. The Edit District Race Code page appears.
4. Use the following table to enter information in the fields:

Field	Description
Code	Enter the district race code, such as A.

Field	Description
Description	Enter a description for the district race code, such as (A) Asian.
Federal Category	Choose the federal category you want to associate to the district race code, such as (A) Asian.
Alt Race Code	If you want to associate alternate district race codes with PowerSchool district race codes, you will need to map the codes appropriately.
	If you are using this field to associate SIF ethnicity codes with PowerSchool district race codes, you will need to obtain the SIF ethnicity codes using the *Race External Code Set* section in the *Schools Interoperability Framework™ Implementation Specification 2.0r1* document available at **http://specification.sifinfo.org/Implementation/2.0r 1/ExternalCodeSets.html - NCES0849RaceType**. Once you have obtained the SIF ethnicity codes, enter the appropriate SIF ethnicity code. For more information about SIF, visit **PowerSource**.

5. Click **Submit**. The Federal Ethnicity and Race Settings page displays the new district race code.

Sort District Race Codes

Use the following procedure to indicate the order in which you want each district race code to display relative to other district race codes within that federal race category. The lower the sort order number, the higher the district race code appears in its respective federal category group in the Race section of the student General Demographics or staff Edit Information page.

Note: You can use 0 or negative numbers, such as -1, to precede other entries. If two items have the same sort order number, the first one created precedes the other.

How to Sort District Race Codes

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Federal Ethnicity and Race Settings**. The Federal Ethnicity and Race Settings page appears.
3. Enter a number in the respective **Sort** fields.
4. Click **Submit**. The Federal Ethnicity and Race Settings page refreshes.

Edit a District Race Code

Use the following procedure to edit existing district race codes.

Note: Student or staff records are not updated when editing district race codes.

How to Edit a District Race Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Federal Ethnicity and Race Settings**. The Federal Ethnicity and Race Settings page appears.
3. Under District Race Codes, click the code, description, or category of the district race code you want to edit. The Edit District Race Code page appears.
4. Edit the information as needed. For field descriptions, see *How to Add a District Race Code*.
5. Click **Submit**. The Federal Ethnicity and Race Settings page displays the edited district race code.

Delete a District Race Code

Use the following procedure to delete existing district race codes.

Note: Student or staff records are not updated when deleting district race codes.

How to Delete a District Race Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Federal Ethnicity and Race Settings**. The Federal Ethnicity and Race Settings page appears.
3. Under District Race Codes, click the code, description, or category of the district race code you want to delete. The Edit District Race Code page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Scheduling/Reporting Ethnicity Codes

In addition to the federal ethnicity and race that appears on the student General Demographics page and the staff Edit Information page, students and staff members are also asked to choose a scheduling/reporting ethnicity. Scheduling/reporting ethnicity codes are used to collect individual student and staff level ethnicity data to be used in scheduling and preconfigured reporting.

Note: For information about setting up federal ethnicity categories and codes used in state-specific reporting, see *Federal Race Categories* and *District Race Codes*.

Add a Scheduling/Reporting Ethnicity Code

Use the following procedure to create new scheduling/reporting ethnicity codes.

How to Add a Scheduling/Reporting Ethnicity Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Scheduling/Reporting Ethnicity Codes**. The Scheduling/Reporting Ethnicity Codes page appears.
3. Click **New**. The New Scheduling/Reporting Ethnicity Codes page appears.
4. Use the following table to enter information in the fields:

Field	Description
Code	Enter the ethnicity code.
Description	Enter a description for the code.
SIF Ethnicity Code	If you want to associate SIF ethnicity codes with PowerSchool ethnicity codes, you will need to map the codes. For more information about SIF, visit **PowerSource**.
	To obtain SIF ethnicity codes, see the *Race External Code Set* section in the *Schools Interoperability Framework™ Implementation Specification 2.0r1* document at **http://specification.sifinfo.org/Implementation/2.0r 1/ExternalCodeSets.html - NCES0849RaceType**.
	Once you have obtained the SIF ethnicity codes, enter the appropriate SIF ethnicity code.

5. Click **Submit**. The Ethnicity Codes page displays the new ethnicity code.

Edit a Scheduling/Reporting Ethnicity Code

Use the following procedure to edit existing scheduling/reporting ethnicity codes.

How to Edit a Scheduling/Reporting Ethnicity Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Scheduling/Reporting Ethnicity Codes**. The Scheduling/Reporting Ethnicity Codes page appears.
3. Click the ethnicity code or description you want to edit. The Edit Scheduling/Reporting Ethnicity Codes page appears.
4. Edit the information as needed. For field descriptions, see *How to Add a Scheduling/Reporting Ethnicity Code.*
5. Click **Submit**. The Ethnicity Codes page displays the edited ethnicity code.

Delete a Scheduling/Reporting Ethnicity Code

Use the following procedure to delete existing scheduling/reporting ethnicity codes.

How to Delete a Scheduling/Reporting Ethnicity Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Scheduling/Reporting Ethnicity Codes**. The Scheduling/Reporting Ethnicity Codes page appears.
3. Click the ethnicity code or description you want to delete. The Edit Scheduling/Reporting Ethnicity Codes page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Student Ethnicity and Race Information

Once federal ethnicity and race is setup, as well as scheduling/reporting ethnicity, you can then import or manually enter student ethnicity and race data.

Import Student Races

During the initial setup of federal race and ethnicity, use the Quick Import function to transfer student race codes into the PowerSchool Student Races table. The import file must include the following columns: RaceCd and Student_Number. For general information, see *Quick Import*. For state-specific information, see PowerSchool recommended state-specific setup of federal race and ethnicity settings available on **PowerSource**.

Note: When importing federal ethnicity and race settings and data into PowerSchool, it is important to perform the imports in the following order: Federal Race Categories, Race Codes, Student Races, and then Teacher Races.

Enter Ethnicity and Race Information for a Group of Students

During the initial setup of federal race and ethnicity, use the Student Field Value function to assign a scheduling/reporting ethnicity to a group of students. For general information, see *Student Field Value*. For state-specific federal ethnicity and race information, see PowerSchool recommended state-specific setup of federal race and ethnicity settings available on **PowerSource**.

Enter Ethnicity and Race Information for an Individual Student

Use the following procedure to enter ethnicity and race information for the selected student.

How to Enter Ethnicity and Race Information for an Individual Student

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Demographics** from the student pages menu. The General Demographics page appears.
3. Use the following table to edit information in the fields:

Field	Description
Ethnicity	Specify whether or not the student is Hispanic or Latino by selecting the appropriate option.
	Note: Information that appears may vary based on your configuration. For information about setting up federal

Field	Description
	ethnicity and race categories and codes used in state-specific reporting, see *Federal Race Categories* and *District Race Codes*.
Race	Specify the student's race by selecting the appropriate checkboxes. **Note:** Information that appears may vary based on your configuration. For information about setting up federal ethnicity and race categories and codes used in state-specific reporting, see *Federal Race Categories* and *District Race Codes*.
Scheduling/Reporting Ethnicity	Specify the student's ethnicity by choosing the appropriate ethnicity from the pop-up menu. **Note:** Information that appears may vary based on your configuration. For information about setting up ethnicity codes used in scheduling and preconfigured reporting, see *Scheduling/Reporting Ethnicity Codes*.

4. Click **Submit**. The Changes Recorded page appears, unless the modified information matches another student's information in one or more of the following fields:

   - Name
   - Student Number
   - School
   - Enroll Status
   - Family ID
   - Student Phone
   - Physical Address
   - Mother's Name
   - Father's Name
   - Guardian's Name
   - Any shared fields that were modified, noted with an "x." When updating linked students, you are updating the information in these fields for those students.

5. On the Students with Shared Family Information page, select the **Update** checkboxes to change the linked student's demographic information to match the modified demographic information of the selected student. For example, if you change the selected student's street address from 12 Maple Way to 1 Apple Drive and the linked student also lives at 12 Maple Way, select the **Update** checkbox to change the linked student's address to 1 Apple Drive.

Staff Ethnicity and Race Information

Once federal ethnicity and race is setup, as well as scheduling/reporting ethnicity, you can then import or manually enter teacher ethnicity and race data.

Import Staff Races

During the initial setup of federal race and ethnicity, use the Quick Import function to transfer staff member race codes into the PowerSchool Teacher Races table. The import file must include the following columns: RaceCd and TeacherID. The TeacherID value is located in the ID field in the Teachers table. For general information, see **Quick Import**. For state-specific information, see PowerSchool recommended state-specific setup of federal race and ethnicity settings available on **PowerSource**.

Note: When importing federal ethnicity and race settings and data into PowerSchool, it is important to perform the imports in the following order: Federal Race Categories, Race Codes, Student Races, and then Teacher Races.

Enter Ethnicity and Race Information for a Group of Staff Members

During the initial setup of federal race and ethnicity, use the Set Staff Field Value function to assign a reporting ethnicity to a group of staff members. For general information, see *Set Staff Field Value*. For state-specific federal ethnicity and race information, see PowerSchool recommended state-specific setup of federal race and ethnicity settings available on **PowerSource**.

Enter Ethnicity and Race Information for an Individual Staff Member

Use the following procedure to enter ethnicity and race information for the selected staff member.

How to Enter Ethnicity and Race Information for an Individual Staff Member

1. On the start page, search for and select a staff member. For more information, see Staff Search.
2. Click **Edit Information**. The Edit Information page appears.
3. Use the following table to edit information in the fields:

Field	Description
Ethnicity	Specify whether or not the staff member is Hispanic or Latino by selecting the appropriate option. **Note:** Information that appears may vary based on your

Field	Description
	configuration. For information about setting up federal ethnicity and race categories and codes used in state-specific reporting, see *Federal Race Categories* and *District Race Codes*.
Race	Specify the staff member's race by selecting the appropriate checkboxes. **Note:** Information that appears may vary based on your configuration. For information about setting up federal ethnicity and race categories and codes used in state-specific reporting, see *Federal Race Categories* and *District Race Codes*.
Reporting Ethnicity	Specify the staff member's ethnicity by choosing the appropriate ethnicity from the pop-up menu. **Note:** Information that appears may vary based on your configuration. For information about setting up ethnicity codes used in scheduling and preconfigured reporting, see *Scheduling/Reporting Ethnicity Codes*.

4. Click **Submit**. The Edit Information page appears.

Search by Ethnicity and Race Fields

To search for students or staff based on ethnicity or race; use any of the following fields in combination with a valid operator (is (=), is not (#), in, not in). Search results will vary depending on the expression you enter.

Field	Description
Ethnicity	Use to search for students or staff based on ethnicity, using the scheduling/reporting ethnicity code.
FedEthnicity	Use to search for students or staff based on ethnicity, using the federal ethnicity code indicated by students or staff answering, "Are you Hispanic or Latino?" 1 = Yes, 0 = No, and 2 = Declined to answer.
FedRaceDecline	Use to search for students or staff based on race, using the federal race code indicated by students or staff indicating one or more races specified (0) of declining to specify race (1).
Race	Use to search for students or staff based on race, using the district race code description.
RaceCode	Use to search for students or staff based on race, using the federal race code.
Race.Fed	Use to search for students or staff based on federal race, using the federal category description.
Race.FedCode	Use to search for students or staff based on federal race, using the federal category code.

Search for Students by Ethnicity and Race Fields

Note: For more information about searching for students, see *Student Search*.

How to Search for Students by Ethnicity and Race Fields

1. On the start page, choose **Student Search** under People in the main menu. The Search Student page appears.
2. Click **View Field List**. The Field List pop-up appears.
3. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank.
4. Click the ethnicity or race field you want to add. The Field List pop-up closes and the selected field appears in the **Search Student** field.
5. Enter a field operator and value after the field in the **Search Student** field.

   Note: For more information about comparators, see *How to Use Comparators*.

6. Click the **Search** icon. The Student Selection page displays the students that meet the criteria you entered.

Search for Staff by Ethnicity and Race Fields

Note: For more information about searching for staff, see Staff Search.

How to Search for Staff by Ethnicity and Race Fields

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Click **View Field List**. The Field List pop-up appears.
3. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank.
4. Click the ethnicity or race field you want to add. The Field List pop-up closes and the selected field appears in the **Search Staff** field.
5. Enter a field operator and value after the field in the **Search Staff** field.

   Note: For more information about comparators, see *How to Use Comparators*.

6. Click the **Search** icon. The Select a Staff Member page displays the staff members that meet the criteria you entered.