



# PowerUPs

# Enrollment Record Management

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# Agenda

1	Workspaces (Pre-Submission/Roster/Submission)
2	Workspace Configuration tools (Roster/Submission)
3	Manage Communication Templates
4	Putting Records on Hold
5	Scheduled Jobs
6	Admin Approval Process
7	Assisting Families
8	Missing Records and How to Find Them
9	*NEW FEATURES*



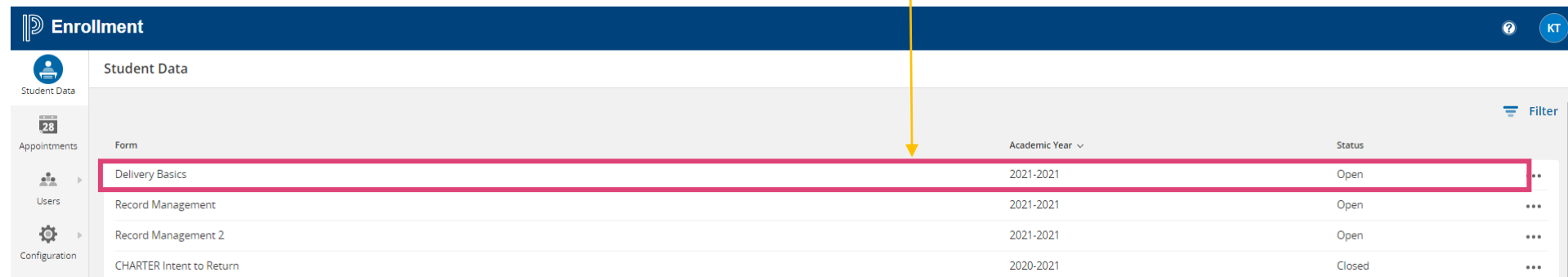
# Workspaces

# Workspace: Access

## 3 Types of Workspaces

1. Pre-Submission Workspace (Restricted forms)
2. Roster Workspace (Private Forms)
3. Submission Workspace (Public/Restricted/Private forms)

Click the row of the form you want to access.



The screenshot shows the 'Enrollment' section of the PowerSchool interface. On the left is a navigation menu with 'Student Data' selected. The main area displays a table of forms. The first row, 'Delivery Basics', is highlighted with a red border. A yellow arrow points from a callout box to this row.

Form	Academic Year	Status
Delivery Basics	2021-2021	Open
Record Management	2021-2021	Open
Record Management 2	2021-2021	Open
CHARTER Intent to Return	2020-2021	Closed

# Workspace: Pre-Submission

Enrollment

Record Management (2021-2021)

Student Data

Appointments

Users

Configuration

Pre-Submission Workspace | Submission Workspace

Select a... View: In-Progress

Tasks | 3 Found | Page 1 of 1

<input type="checkbox"/>	First Name	Last Name	Date of Birth	Email	Date Started	Date Last Accessed	Current Page	Language
<input type="checkbox"/>	Daffy	Duck	01/02/2003	kayla.wilkinson@powerschool.com	01/20/2021	01/20/2021	1	English
<input type="checkbox"/>	Nancy	Jones	05/15/2016		03/23/2021	03/23/2021	1	English
<input type="checkbox"/>	Test	Tester	01/02/2003	kayla.wilkinson@powerschool.com	01/20/2021	01/20/2021	1	English

Page Size: 20 | 50 | 100 | 500

## Things to know about the Pre-Submission Workspace

- Only for Restricted forms
- 1 View only shows in-progress forms
- View cannot be edited
- Information shown here pulls from the family account

# Workspace: Pre-Submission

Enrollment Record Management (2021-2021)

Student Data

Pre-Submission Workspace | Submission Workspace

Select a... View: In-Progress

3 Found | Page 1 of 1

	First Name	Last Name	Date of Birth	Email	Date Started	Date Last Accessed	Current Page	Language
<input type="checkbox"/>	Daffy	Duck	01/02/2003	kayla.wilkinson@powerschool.com	01/20/2021	01/20/2021	1	English
<input type="checkbox"/>	Nancy	Jones	05/15/2016		03/23/2021	03/23/2021	1	English
<input type="checkbox"/>	Test	Tester	01/02/2003	kayla.wilkinson@powerschool.com	01/20/2021	01/20/2021	1	English

Page Size: 20 | 50 | 100 | 500

## Task Menu

- **Send Email** – Use this to send reminder to submit emails to in-progress forms
- **Export** – Export this info into excel if you send emails from a 3rd party
- **Manage Comm. Template** – This is where you set-up and edit the email that gets sent in the **Send Email** task
- **Manage Process Docs.** - You can add process documents here for your admins to access

Tasks

- Send Email
- Export
- Manage Communication Templates
- Manage Process Documentation

Note: Tasks shown here depend on the View you have selected.

# Workspace: Roster

Enrollment

Record Management 2 (2021-2021)

Roster Workspace Submission Workspace

Select a... **View: All Roster Records** | Filter: None | Tag: None

Tasks | No records were found.

Find Records

FirstName	LastName	DateOfBirth	ExternalStudentID	School	Grade	Snapcode	Status	Tags	EmailHistory	LetterHistory
No records were found.										

Page Size: 20 | 50 | 100 | 500

## Things to know about the Roster Workspace

- Only for Private forms
- Information shown here gets imported into the workspace from your SIS
- Multiple views (record moves to different views depending on where they are in the form journey)
- Views can be edited
- Shows not started, started and submitted records

# Workspace: Roster

Enrollment

Record Management 2 (2021-2021)

Student Data

Appointments

Users

Configuration

Roster Workspace | Submission Workspace

Select a... View: All Roster Records | Filter: None | Tag: None

Find Records

FirstName	LastName	DateOfBirth	ExternalStudentID	School	Grade	Snapcode	Status	Tags	EmailHistory	LetterHistory
No records were found.										

Page Size: 20 | 50 | 100 | 500

## Task Menu

- **Add New** - Manually add students to the roster workspace
- **Import** – Import either via File or API (depends on SIS)
- **Validate for Notification** -
- **Notify** – Use this when you are ready for families to access the form. If a record is not notified families will not be able to access the form.
- **Hold** – If you do not want to families to access a record after notification you can put them on hold
- **Send Email** – Use this to send reminder to submit emails to in-progress forms
- **Export** – Export this info into excel if you send emails from a 3rd party
- **Manage Comm. Template** – This is where you set-up and edit the email that gets sent in the Send Email task
- **Manage Process Docs.** - You can add process documents here for your admins to access

Tasks

- Add New
- Import
- Validate for Notification
- Notify
- Print Labels
- Assign Tags
- Remove Tags
- Export
- Manage Communication Templates
- Manage Process Documentation

Note: Tasks shown here depend on the View you have selected.

Tasks

- Hold
- Send Email
- Print Letters
- Print Labels
- Assign Tags
- Remove Tags
- Export
- Manage Communication Templates
- Manage Process Documentation

Note: Tasks shown here depend on the View you have selected.



# Workspace: Submission

Enrollment

Record Management (2021-2021)

Pre-Submission Workspace | Submission Workspace

Select a... **View: All Submissions** | Filter: None | Tag: None

Student ID	First Name	Last Name	DoB	Grade	Enroll School	SL School	Submitted	Tags
<input type="checkbox"/>	Kayla	Test	02/02/2002	1	Garfield Elementary		01/20/2021	Address Not Verified, Allergies 01Tami, Allergy, Allergy SP, bwPhoto_Release, Medical 4, Polished

Page Size: 20 | 50 | 100 | 500

## Things to know about the Submission Workspace

- For all forms (Public, Restricted, Private)
- Shows Submitted forms
- Multiple Views (record moves to different views depending on where they are in the submission journey)
- Views can be edited
- Information shown here pulls from the submitted form

# Workspace: Submission

**Enrollment** ? KT

Record Management (2021-2021)

View [ZZ Enrollment Training - Self Service documentation](#) for Record Management (2021-2021).

Pre-Submission Workspace | Submission Workspace

Select a... View: **All Submissions** | Filter: *None* | Tag: *None* Tasks | 1 Found | Page 1 of 1

Find Records

Student ID	First Name	Last Name	DoB	Grade	Enroll School	SL School	Submitted	Tags
<input type="checkbox"/>	Kayla	Test	02/02/2002	1	Garfield Elementary		01/20/2021	Address Not Verified, Allergies 01Tami, Allergy, Allergy SP, bwPhoto_Release, Medical 4, Polished

20 | 50 | 100 | 500

## Task Menu

- **Polish Data** – Scrub's data, so things are properly capitalized, or streets are properly abbreviated to what is set up for polishes. Usually don't automatically.
- **Approve** - When data is reviewed in pending approval and ready to be delivered. Once approved record will move from pending approval to pending delivery.
- **Reset to Pending Approval** - Move the record back to pending approval
- **Deliver Data** - When you are ready to deliver data to your SIS click this from pending delivery view.
- **Reset Delivery History** - If record needs to be re-delivered this moves record back to pending delivery view
- **Assign/Remove Tags** – If you want to add/remove tags in mass
- **Print Forms** – Where you can export your print templates including a copy of the submitted form
- **Discard** - If the student no longer needs to be delivered you can click discard. This will move the record to the discard where, if need be, can still be accessed.

The image shows three overlapping screenshots of the 'Tasks' menu. The top-left menu lists: Polish Data, Approve, Assign Tags, Remove Tags, Print Forms, Download Forms, Print Letters, Send Email, Export, Discard, Manage Communication Templates, and Manage Process Documentation. The top-right menu lists: Reset to Pending Approval, Assign Tags, Remove Tags, Print Forms, Download Forms, Print Letters, Send Email, Export, Discard, Manage Communication Templates, and Manage Process Documentation. The bottom-center menu lists: Deliver Data, Reset to Pending Approval, Assign Tags, Remove Tags, Print Forms, Download Forms, Print Letters, Send Email, Export, Discard, Manage Communication Templates, and Manage Process Documentation. The bottom-right menu lists: Reset Delivery History, Assign Tags, Remove Tags, Print Forms, Download Forms, Print Letters, Send Email, Export, Discard, Manage Communication Templates, and Manage Process Documentation. A yellow arrow points from the 'Tasks' dropdown in the screenshot above to the top-left menu.



# Workspace Tools

# Student Data

Rules

Tags

Views

Student  
Record Views



# Rules

## Filters

- Used to locate specific records in Workspace

## Permission Rules

- Applied to school/district accounts to limit what records they see.

## Auto-Tagging Rules

- Used to automatically apply tags to records as they come into Submission Workspace

# Filter Vs. A Tag

## Filters

- Use when you do not need a note specifically on a student record
- Example; school filter, grade filter

## Auto-Tagging Rules

- When you need a "sticky note on a record" or when you need to call something out about a record
- Example; change of address, allergies, needs transportation

# Tag Types

## Auto Tags

- Used when you want to tag based on the submitted data (ie. New Address)

## Manual Tags

- Used when it is something admins need to check post submission (ie. Verified Address)

# Views

## Default

- Built into system
- Dictate flow of records through workspace
- Editable

## Custom Views

- Custom sets of data for custom set of records
- Pre-configure canned export reports



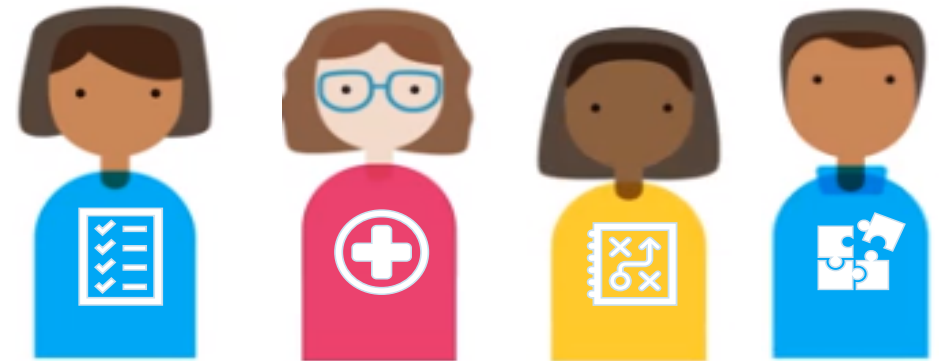
# Student Record Views

Custom Detail  
View

Relevant Data

Appropriate  
Staff

Roster and  
Submission  
Workspace





# Managing Communication Templates

# Where They are Available



# Manage Communication Templates



Returning Student Enrollment 20-21 (2020-2021)

View [ZZ Enrollment Training documentation](#) for Returning Student Enrollment 20-21 (2020-2021).

Roster Workspace Submission Workspace

Select a... View: Imported / Added | Filter: None | Tag: None

Tasks 1 Found | Page 1 of 1

Student ID	First Name	Last Name ↑	DoB	School	Grade	Snapcode	Status	Tags	Email History	Letter History
TEST00	Michael	Smith	05/15/2005	Apple Grove High School	9		ImportedAdded			

Tasks

- Add New
- Import
- Validate for Notification
- Notify
- Assign Tags
- Remove Tags
- Export
- Manage Communication Templates
- Manage Process Documentation

Note: Tasks shown here depend on the View you have selected.

# Communication Template Types



Email

Pre-Submission  
Roster  
Submission



Letter

Roster  
Submission



Label

Roster  
Submission  
(Avery Based)

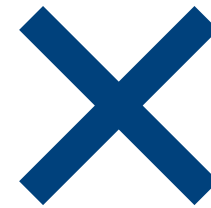
# Manage Communication Template



Add



Edit



Delete

# Manage Communication Templates

## Manage Communication Templates (Roster)

← Back to Returning Student Enrollment 20-21 (2020-2021)

### Email Templates

- Snapcode Email (Notification) - Delete
- SSC Email (Notification) - Delete
- Test reminder - Delete
- Test - Delete
- Missing Document - Delete
- Form not submitted - Delete

Add Template

Reorder

### Letter Templates

- Notification Letter (Notification) - Delete

Add Template

## Snapcode Email

← Back to Communication Templates (Roster): Returning Student Enrollment 20-21 (2020-2021)

### Details

Title	Snapcode Email
From Address	PowerSchool Registration Support
Reply-To Address	PowerSchool Registration Support
Subject	*is*Customer.Name*is* *is*Action.Title*is* for *is*PROP.FirstName*is* *is*PROP.LastName*is*
Multiple Recipients	No
Roster Notification Email	Yes
Active Template	Yes
Recurring Email	No

Edit Details

### Body

\*is\*Customer.Name\*is\* - \*is\*Action.Title\*is\*

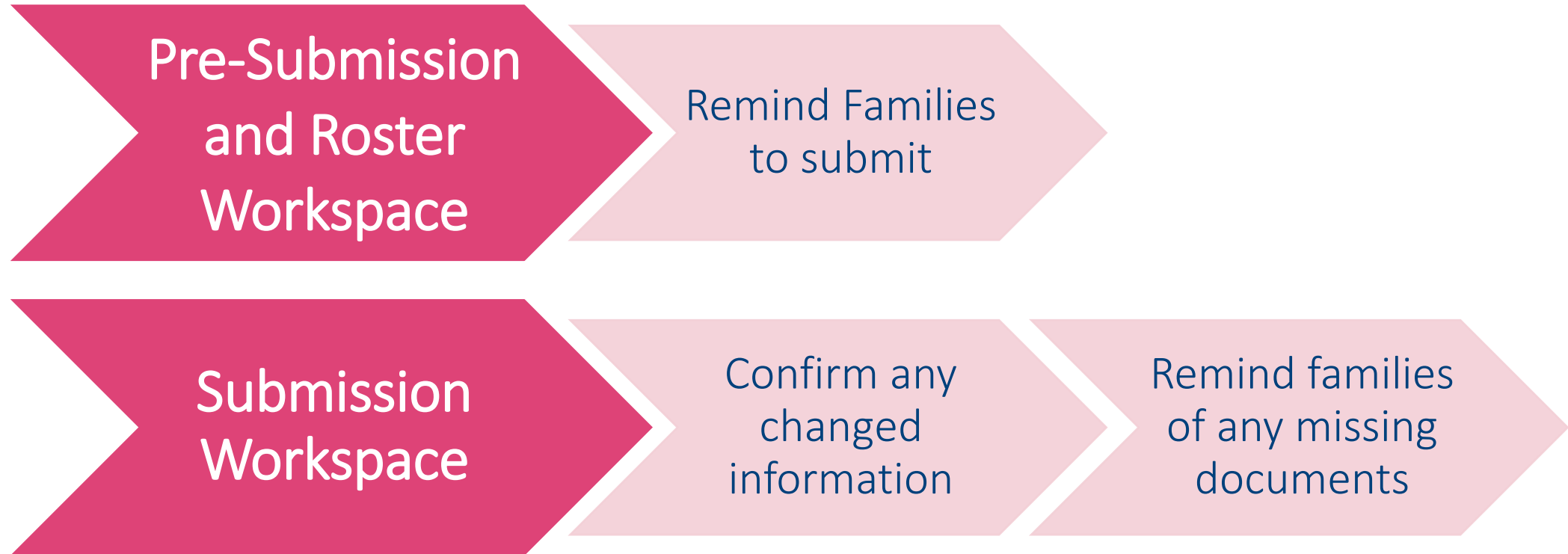
To the parent(s) of: \*is\*PROP.FirstName\*is\* \*is\*PROP.LastName\*is\*,

We are excited to announce online \*is\*Action.Title\*is\* for the upcoming school year! This process replaces the paper forms sent home at the beginning of each school year. Your \*is\*Action.Title\*is\* for \*is\*stu\_FirstName\*is\* \*is\*stu\_LastName\*is\* at \*is\*Customer.Name\*is\* is now available online.

**How do I get started?**  
Use this snapcode link: \*is\*TOKEN:SnapcodeHyperlink\*is\*

Select Template>Edit Details>Save> Edit Body> Save

# How to Utilize Communication Templates







# Putting Records on Hold

# Putting Records on Hold

Enrollment

Record Management 2 (2021-2021)

Roster Workspace Submission Workspace

Select a... View: All Roster Records | Filter: None | Tag: None

Tasks

No records were found.

Page Size: 20 | 50 | 100 | 500

## Task Menu

- **Hold** – If you do not want to families to access a record after notification you can put them on hold

Tasks

- Add New
- Import
- Validate for Notification
- Notify
- Print Labels
- Assign Tags
- Remove Tags
- Export
- Manage Communication Templates
- Manage Process Documentation

Note: Tasks shown here depend on the View you have selected.

Tasks

- Hold
- Send Email
- Print Letters
- Print Labels
- Assign Tags
- Remove Tags
- Export
- Manage Communication Templates
- Manage Process Documentation

Note: Tasks shown here depend on the View you have selected.



# Auto Jobs

# Scheduled Jobs

Email  
Notification

Import

Deliver Data  
(API/File SFTP)

School Choice  
Transfer  
Lottery Results

School Choice  
Import

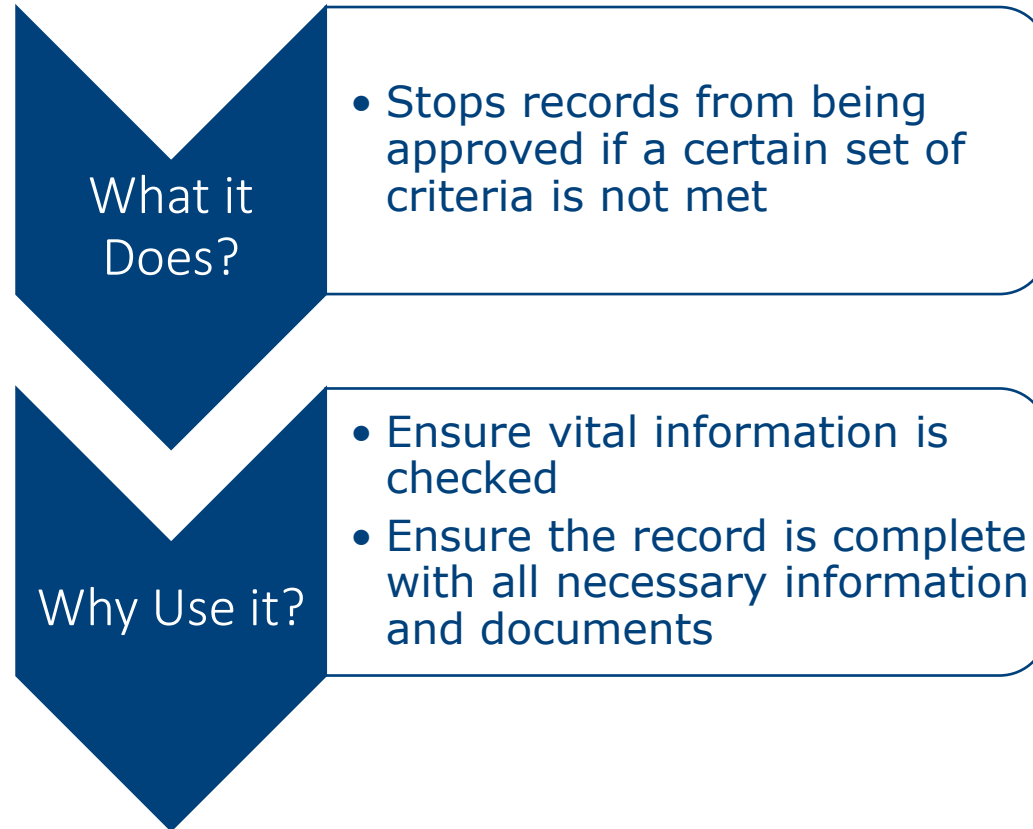
School Choice  
Processing

<https://docs.powerschool.com/PSEHA/configuration/scheduled-jobs>



# Admin Approval Process

# Approval Criteria





# Assisting Families with Submitting

# Common Family Questions

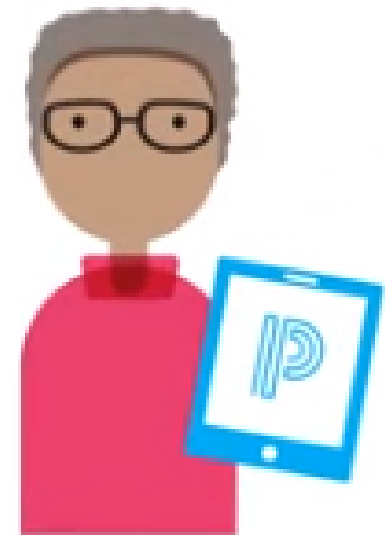
I can't access the form

I can't submit the form

I submitted, but I can't get back in to upload a doc

I can't find the missing fields

I submitted the form for sibling A, but it says I submitted sibling B





# Family Account Management

Look up Family Accounts

Reset Passwords

Help Families Submit

See Submitted forms

The screenshot shows the 'Enrollment' section of the PowerSchool interface. On the left is a navigation sidebar with icons for 'Student Data', 'Appointments' (with a '28' notification), 'Users' (highlighted in yellow), and 'Configuration'. The main content area is titled 'Family Accounts' and contains a search form with fields for 'First Name' (containing 'kayla') and 'Last Name'. Below the form is a 'Find Accounts' button and a 'Clear Search' link. An 'Options' box on the right contains a 'Password Change Log' link. The 'Accounts Found' section lists 'Kayla Wilkinson' with a long email address and a list of other users in the system.

<https://docs.powerschool.com/PSEHA/users/family-accounts>



# Missing Records

# Missing Record, What to do next?

Family Account

Check the family account to make sure the record for that student was submitted and submitted for the correct year.

Workspaces  
(Roster/Submission)

Check both roster and submission workspace. Also check the discarded view. If you are unable to check the family account, also check previous years if you still have those open

Search Other  
Possible Names

Sometimes browser auto fill name fields and parents do not catch this, so try searching for a parent's name or sibling name in the workspaces.

# Verification Page

**What is it?** It's the first page on the form that asks 1-2 questions which determines if they are in the right form. This page when set-up will not allow families to continue filling out the incorrect form

**How does it help?** It stops families from filling out the form for the wrong academic year or stops families from filling out the New Student Form when they should be filling out the Returning

## Verification ⓘ

What academic year are you registering for? required

2021-2022 

Have you attended this district before? required

- Select - 



# NEW FEATURES

# New Features



Parent  
Update Submission



Reject  
Submission

# Parent Update Submission

Form is Open

Submission is NOT currently in a delivery batch

Submission has NOT been delivered to a SIS

Submission has NOT been imported yet into the School Choice Workspace

## Submitted Forms

New Registration 20-21 (Restricted) 2019-2020 (Tom) Submitted: 10/11/2021 Last Updated: 11/03/2022	Edit >
Student Enrollment Form - Private 2019-2020 (Harry) Submitted: 10/28/2022	Edit >
New Registration 20-21 (Restricted) 2019-2020 (justin) Submitted: 10/11/2021	Edit >

## Parent Dashboard

### New Registration 20-21 (Restricted) 2019-2020 (Tom)

Compared to a paper process, how would you rate your online experience?



Send Feedback

**i** If needed, you may edit your information and resubmit this form.

Edit Form

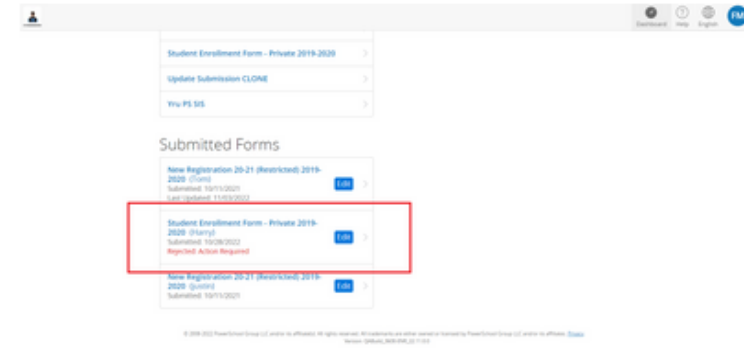
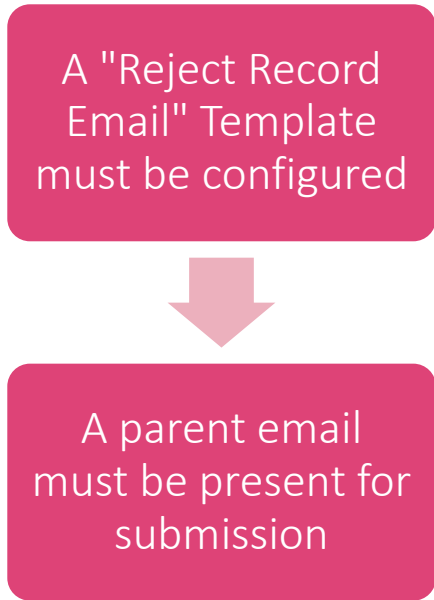
Submission Successful

## Submission Confirmation prompt

# Reject Submission

 This form submission has been rejected. Edit your information and resubmit this form. [Edit Form](#)

Submission Confirmation rejection prompt



Family Account Dashboard

To the parent(s) of **\*is\*PROP:FirstName\*is\* \*is\*PROP:LastName\*is\***,  
Your 2022-2023 School Choice Application for **\*is\*PROP:FirstName\*is\* \*is\*PROP:LastName\*is\*** has been rejected.  
Rejection Reason:  
**\*is\*SubmissionRejectionReason\*is\***  
Please re-access your 2022-2023 School Choice Application submission, correct the noted issue(s), and resubmit the form. In order to re-access this submission, you will need to provide the access code **\*is\*SubmissionUpdateAccessCode\*is\*** and your student's date of birth.  
Thank you!  
Apple Tree Independent School District





# Contacting Support

# Contacting Support

## Creating Project Tasks and Support Cases

As an authorized technical contact from your school or district, you can now create and manage your Enrollment projects and Support cases in the Community.

- [Creating Enrollment Tasks and Cases](#)
- [Managing Enrollment Cases](#)
- [Enrollment Project Milestones](#)

## Searching the Community

You can start a search from anywhere in our PowerSchool Community. When you enter a term in the search bar, you'll see results populate from across our Community. Here are some helpful [Search Tips](#) to help narrow down your results.

## Participating in Forums

We encourage participation in our forums, and we recognize our top contributors! You can connect with your peers and our Community team through our various forums under [Product Support](#), our [Community Forum](#), and [Technical Contact Forum](#). Not sure where to start? You can use [Start a Discussion](#) on the Home page to get started. Give kudos and accept member responses as a solution to help other members find helpful posts quickly. Learn about [Kudos and Accepted Solutions](#).

## Subscriptions & Notifications

You can subscribe to receive notifications when a new resource is posted in the Community. Simply navigate to any Forum, Blog, and Knowledge Base. In the **Options** menu, select **Subscribe**. Learn more about [how to subscribe and manage your notifications](#).

## Helpfulness Ratings on our Knowledge Base Articles

Helpfulness rating is a feedback feature in our Community Knowledgebase. This helps the PowerSchool Community Team to understand whether the articles that we create are helpful and relevant. [This video](#) provides a walkthrough of how to provide a helpfulness rating.

PowerSchool users can now submit a request to enhance or add features into PowerSchool products directly to the PowerSchool Product teams. Here is a quick guide on how to [submit an enhancement request in the PowerSchool Ideas Portal](#).

# How to Contact Support

1. Launching Chat Support
2. How to Call Support
3. Submit cases in community (revisions, questions etc)



# Resources

Help Guide & Community

# Resources

## Community Resources

<a href="#">Parent Update Submissions</a>	<a href="#">Document Upload Fields</a>
<a href="#">Reject Submissions</a>	<a href="#">Student Record Views</a>
<a href="#">Workspace Feature Index</a>	<a href="#">Custom Views</a>
<a href="#">Filters and Tags</a>	<a href="#">Notifying Records &amp; Sending Comms</a>
<a href="#">Tips &amp; Tricks Workspace Configuration</a>	<a href="#">Approval Workflow</a>
<a href="#">Using Submission Tasks</a>	<a href="#">Data Management Essentials</a>
<a href="#">Using Roster Tasks</a>	<a href="#">Scheduled Jobs</a>
<a href="#">Intermediate Workspace Tools</a>	<a href="#">Family Account Management</a>
<a href="#">Family Utilization</a>	

# Help Guide



## Topics Include

- Release Notes
  - Provides information on what was updated in the releases
- Hot Topics
  - Shows the most looks at topics
- Get Started
  - Basic Navigation of the Admin Portal
- Student Data
  - Everything you need to know about the student data tab on your admin page including record progressions
- Users
  - Information on Family Accounts, Admin Accounts and Group Accounts
- Configuration
  - Holds all the information about the Self-Service tool

Form	Academic Year	Status	
Delivery Basics	2021-2021	Open	...
Record Management	2021-2021	Open	...
Record Management 2	2021-2021	Open	...
CHARTER Intent to Return	2020-2021	Closed	...

**PowerSchool Enrollment Admin Help**

Search  [Visit our Community](#)

### Welcome to Admin Help

Your in-app help is now available from a central online location in a simple, easy-to-use format.

#### What's New?

The release notes provide details about the latest release of PowerSchool Enrollment.

#### Videos

The latest training videos for PowerSchool Enrollment are available on PowerSchool Community.

#### Workflows

- Appointments
- Checklists
- Decisions
- Recommendations
- Roster Workspace
- Submission Workspace

#### Recent Topic Updates

- Admin Accounts
- Reports

#### Hot Topics

Check out these hot topics that most commonly helped other users.

- Files
- Form Builder
- Navigation
- Permission Profiles
- Predefined Lists
- Print Templates
- Properties
- Student Data
- Tokens

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# Questions



# Upcoming Events & Webinars



# Upcoming Events

Enrollment Office Hours

Wednesdays @ 11am ET / 8am PT

<https://help.powerschool.com/t5/Enrollment-Office-Hours-and/Register-Now-for-PowerSchool-Enrollment-Ask-the-Experts-2023/ta-p/453326>

\*Recordings found here

# Upcoming Webinars

<https://help.powerschool.com/t5/Enrollment-Office-Hours-and/Register-Now-for-Enrollment-PowerUps-2023/ta-p/453567>

**Communication Templates** -- During this session, we will cover where to find your communication templates, how to edit them as well to create new ones.

May 16th

**Print Templates** – Come join me in creating the 3 different types of print templates. I will walk you through creating your own as well as adjusting your current ones.

June 6th

**Permissions & Profiles** – This session will give you a crash course into managing your district's permissions and profiles. We will cover adding/adjusting profiles as well as adding new staff to forms.

July 18th

