

**Welcome to the Unified Talent
PowerSchool PowerUp!**



February 2023

Today's Agenda

- Welcome
- Preparing for Change
- Your EIC Talent Team
- ATS March Session
- SFE Update
- Breakout Rooms
 - Applicant Tracking
 - Employee Records
 - Perform
 - Professional Learning



Preparing for Change

- 1 Understand why you're changing
- 2 Begin with the end in mind (Set your goals!)
- 3 Recognize the needs of your users
- 4 Make it happen!



Understand the Why

- Update to your technology
- New State or District Policies
- Adding a new Workflow



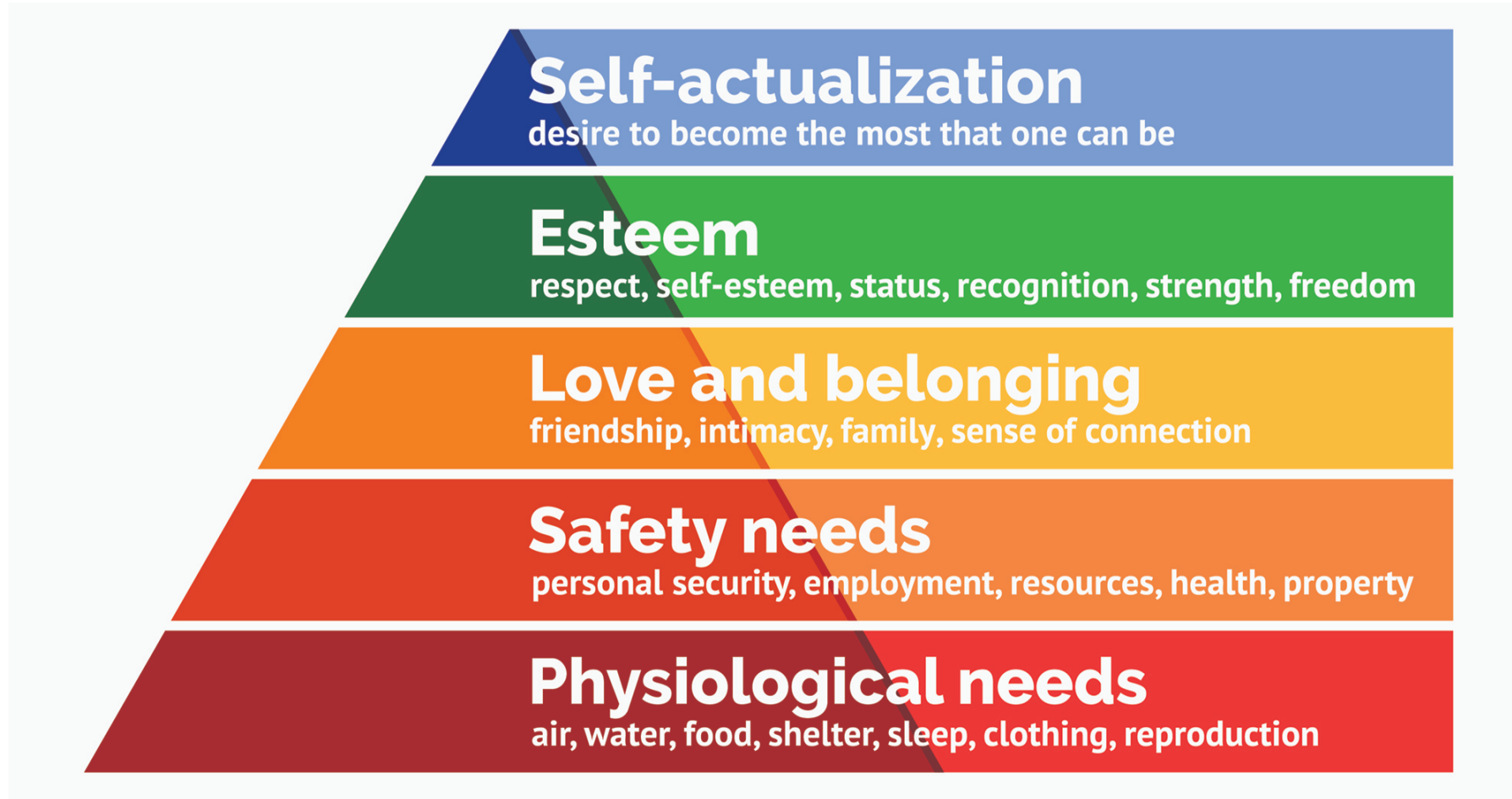
Begin with the End in Mind (Set your Goals!)

- **Concept:**
 - Envision and create a desired outcome
- **Leads to:**
 - Increased and effective planning, increased visioning, thinking outside the box, and responsible decisions
- **Implementation:**
 - Plan for the future with a vision of the desired outcome in mind and work purposefully and creatively to meet that goal

Begin with the End in Mind (Set your Goals!)



Recognize the needs of your users!



Recognize the needs of your users!

Managing Complex Change Model

Vision	Skills	Incentives	Resources	Action Plan	=	CHANGE
Vision	Skills	Incentives	Resources	Missing	=	TREADMILL
Vision	Skills	Incentives	Missing	Action Plan	=	FRUSTRATION
Vision	Skills	Missing	Resources	Action Plan	=	RESISTANCE
Vision	Missing	Incentives	Resources	Action Plan	=	ANXIETY
Missing	Skills	Incentives	Resources	Action Plan	=	CONFUSION

Adapted from Knoster, T., 1991 in TASH Conference, Washington D.C., from Enterprise Group, LTD



Make it happen!

- Reach out to your Customer Success Manager and ask for time with an Education Impact Consultant (EIC)
- Share the change that needs to happen with the CSM so we can prepare for our time together
- Your EIC can then meet to help you through the steps for successful change!



Your Talent Education Impact Consultant Team



Sean Vair

Experience:

Classroom Teacher / Dept Coord
11 Years

Educational Technology
7 Years



Stuart Aron

Experience:

Teacher & Coach
32 Years

Educational Technology
3 Years



Cortnie Shaffer

Experience:

Classroom Teacher
5 Years

Assistant Principal
3 Years

Your Talent Education Impact Consultant Team



Edie Smith

Experience:

Administrative & Onboarding
2 Years

K-12 HR Software Administrator
4.5 Years



Marissa Gonzalez

Experience:

Teacher and Specialist
9 Years

District Level
8 Years

Ed Tech
1 Year

Sneak Peek: March ATS Breakout Room

Let's talk filters!

Analyze different scenarios

Collaborate on the best way to tackle unique filter needs

Build a custom filter and get support through the process

GLOBAL FILTER SETS ASSIGNED TO JOHNNY SPOT

The user has been assigned the following global application filter set(s). You can assign one or more global filter sets to this user below. To make specific changes to this and other global filter sets, go to [MANAGE GLOBAL FILTER SETS](#).






ADD

GLOBAL FILTER SETS ASSIGNED TO USER SECURITY GROUP

The user security group has been assigned the following global application filter set(s). You can assign one or more global filter sets to this user security group. To make specific changes to this and other global filter sets, go to [MANAGE GLOBAL FILTER SETS](#).

CUSTOM FILTERS ASSIGNED TO JOHNNY SPOT

This user has been assigned the following custom application filters. You can make changes to these filters below. The options available in the dropdown boxes below include all options from all users. [Click here](#) to add additional options.

1		Application - Prescreen Ratin	Equals		
2	AND	Job - Position Title	Not Contain	Custodian	
3	AND	Job - Position Title	Not Contain	Maintenance	
4	AND	Application - Prescreen Ratin	Equals	Pass	
5	AND	Interviews (All) - Interview Ra	Greater Than	3	

ADD

AND (All criteria must be true.)

SmartFind Express

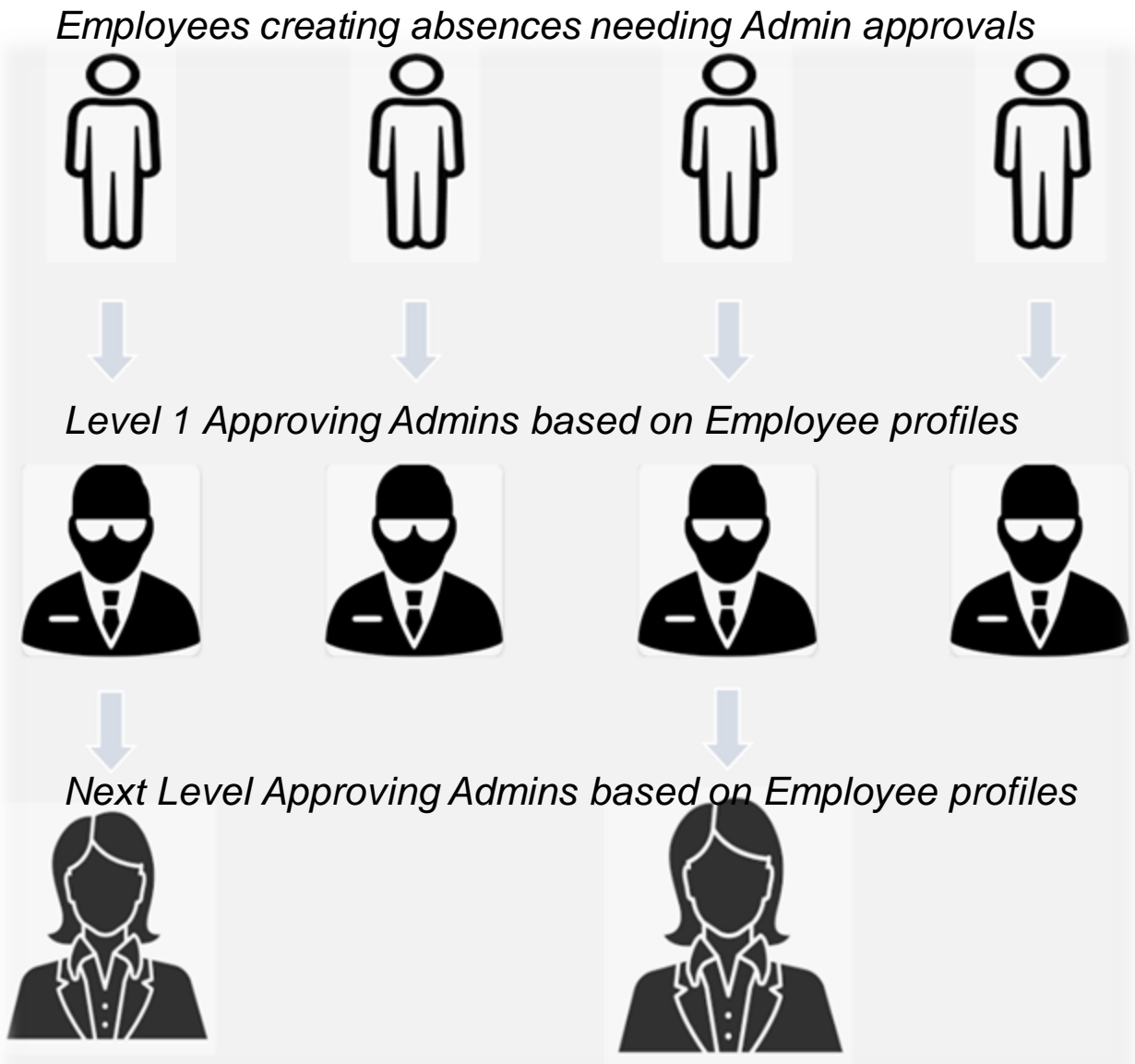
New User-based absence approval routing

New Simplified and Flexible Absence Approval Setup

- “User-Based Absence approvals” available in SFE 23.1 release
 - Improvement to the absence approval setup to directly define approving admins to users
- Adds to existing Location-based based and Absence approval user groups as Absence routing methods
- The new feature is optional and can be configured based on the requirements of the school district
- All the three methods can be used as needed while configuring absence approvals on the reason
- (Future enhancements will allow for imports to make the process easier)

User based Absence approval routing

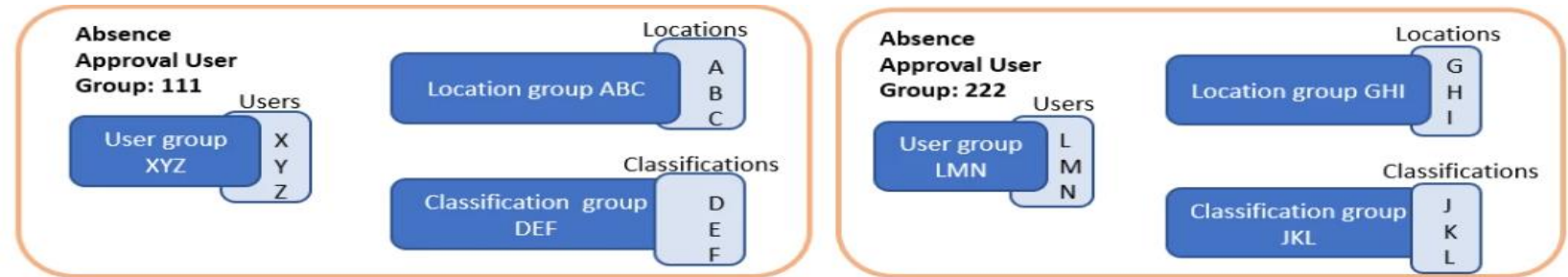
- Administrators can be configured as approvers on employee profiles
- One or more Admins can be configured on individual levels of approvals, based on District requirements
- Based on selected method of Absence approval routing , approval will be routed properly to configured Admins



Absence approval user groups

Absence approval user groups is an existing SFE feature which can be used if there is need to configure Absence approval routing based on combination of Locations and Classifications. Improvements will be done in future releases to simplify the set up of Absence approval user groups

- Reason Code : 123
- Approval Levels : 2
- Approval groups checkbox : Selected
- Approval Level 1 : 2 user groups selected (**111 & 222**)
- Approval Level 2 : No user group selected



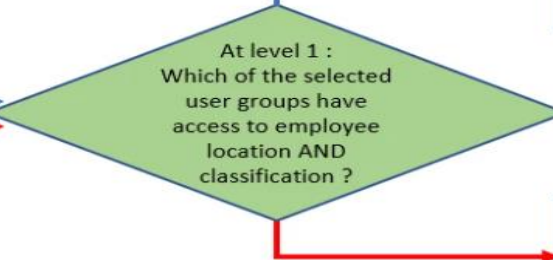
Employee 444 with Location = **A**, Classification = **D** creates an absence 101 with Reason Code **123**



Check Reason Code and approval levels for that reason and location AND classification on the absence

Absence approval user group 111 has access to employee location A and Classification D . Job 101 approval route to users X, Y, Z

Absence approval user group 222 has access to employee location G and Classification J. Job approval route to users L, M, N



Send approval notifications to users X, Y, Z only

Send approval notifications to users L, M, N only

Similarly, for future levels



Employee 555 with Location = **G**, Classification = **J** creates an absence 102 with Reason Code **123**



How to turn on and user Absence approval routing methods

Parameters: Jobs

Job Approval:

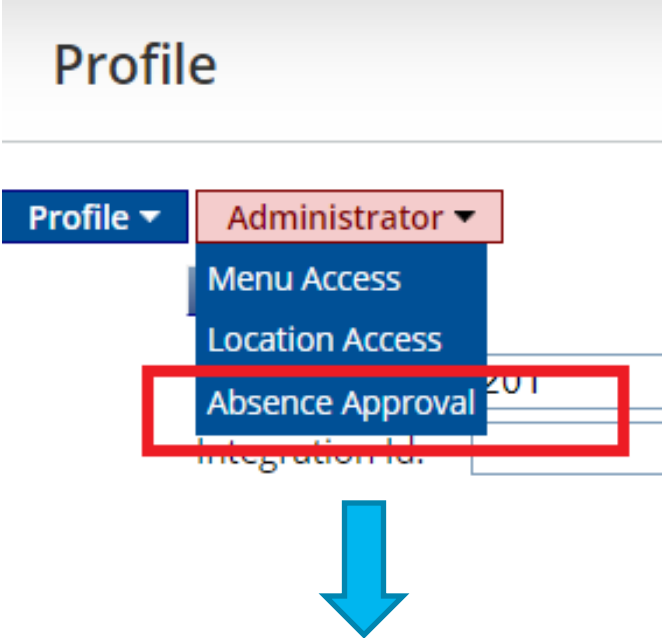
- Require for selected reasons
- # of hours before job start for approval request:
- Allow pending requests to be filled
- Skip approval process if Administrator that approves requests creates absence for an employee
- Skip approval process if Administrator that approves requests creates their own absence
- Skip approval process for a split job when split from an approved job
- Approval comments are mandatory when employees create absences
- Include Open/Active & Finished jobs pending approval in transactional exports
- Exclude Pending Approval jobs in manual exports
- Enable feature for approval form with Fully Approved Absence Approval
- Attach populated approval form to job
- Enable absence approval user group list creation  Parameter to turn on Absence approval user groups based Absence routing
- Enable absence approval process to use User Groups for assigning approvers
- Enable multiple absence approval user groups selectable for same reason - level
- Consider Classifications within Classification group of Absence approval user group while routing absence approval requests.
- Enable user based absence approval routing  Parameter to turn on User based absence approval routing

Job Creation:

of days before starting that jobs can be reported:

How to turn on and user Absence approval routing methods

Employees can be searched and added to Admins profiles from the Absence approval tab. This Admin will be configured as Approving admin for the selected employees



New 'Absence approval' tab on Admin tabs to add Employees for which that Admin would be the approver

Absence Approval

Profile ▾ Administrator ▾

Name: Jennifer 2000001, test
Access ID: 201
[Return To Inquiry](#)

Search Criteria

Status: All Active Inactive

Calendar:

Location:

Classification:

Custom Field:

[Search](#)

User List

Select	Name	Access ID	Status	Approval Level
<input type="checkbox"/>	EmpSub	555555	active	1

[Select All](#) [Delete](#)

How to configure User Absence approval routing on the Reason

- *Based on Absence approval routing methods used, radio buttons will show up on Reason configuration*
- *Based on District needs, different approval routing methods can be used on different levels*

Reasons

Modify Absence/Vacancy Reason

* Code: ▲ Modifying the code may impact the mapping with corresponding codes in other applications

* Name: * (En)
 * (Fr)
 * (Es)

* Reason applies for:

* Reason applies to:

Requires Approval:

Use absence approval user group list to add exceptions to the current approval process

* Note : Define the user group at each level that will have different approvers for specific job types with this reason. All jobs outside of the group defined on each level that do not meet the group criteria will continue to follow the level and location for approval that is defined in the administrators profile. Groups only need to be defined at each level where an exception is needed.

Highest Level:

Level: 1 Location Admins Profile level Admin(s) User Groups

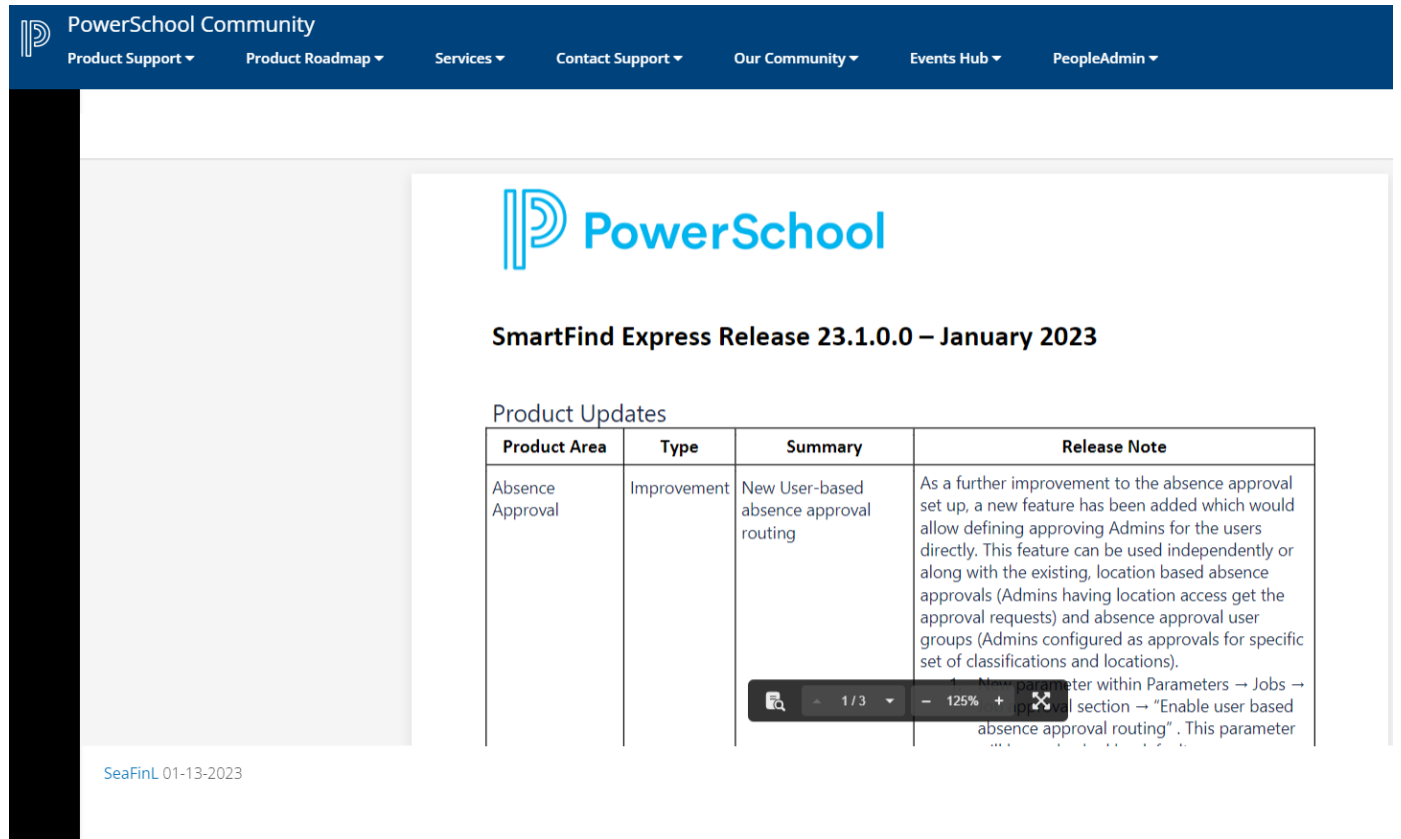
Level: 2 Location Admins Profile level Admin(s) User Groups

Select user groups

- abcd : Location group 1 - Classification group 1
- Admin_usergrp77 : India Location group - Class
- sbo administration : cotton school district - Tes
- Test Admin 4 : cotton school district - Test Clas

Where can I find out more?

- PowerSchool Community
 - SmartFind Express Absence Management Product Updates
 - SmartFind Express 23.1.0.0 Release
 - <https://help.powerschool.com/t5/Smartfind-Express-Absence/ct-p/SmartFind Express Product Updates>



The screenshot shows the PowerSchool Community website. The navigation bar includes links for Product Support, Product Roadmap, Services, Contact Support, Our Community, Events Hub, and PeopleAdmin. The main content area features the PowerSchool logo and a heading for "SmartFind Express Release 23.1.0.0 – January 2023". Below this is a "Product Updates" section with a table of updates.

Product Area	Type	Summary	Release Note
Absence Approval	Improvement	New User-based absence approval routing	As a further improvement to the absence approval set up, a new feature has been added which would allow defining approving Admins for the users directly. This feature can be used independently or along with the existing, location based absence approvals (Admins having location access get the approval requests) and absence approval user groups (Admins configured as approvals for specific set of classifications and locations). New parameter within Parameters → Jobs → Parameters → "Enable user based absence approval routing". This parameter

SeaFinL 01-13-2023

Breakout Room Topics

Applicant Tracking

- Email Notification Best Practices

Perform

- Effective Meeting Management using Scheduling

Employee Records & Onboarding

- Customizing Security Settings

Professional Learning

- Setting up Courses with the End in Mind

Applicant Tracking

Email Notification Best Practices



Accessing Notifications

Welcome to TalentEd Hire [Sign Out](#)

TOOLS APPLICATION MANAGER DASHBOARD REPORTS CONFIGURE SUPPORT

CONFIGURE

- Forms & Applications**
 - Application Types
 - Custom Forms
 - Dropdown Box Choices
 - Job Templates
- Communication Tools**
 - Staff Email Notifications
 - Candidate Email Notifications
 - System Email Notifications
 - Email Templates
- Setup & Configuration**
 - Screening Scores
 - Application Recycle Bin
- District Information**
 - Users & Filters
 - Buildings & Locations
 - Candidate Portal

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Welcome to TalentEd Hire [Sign Out](#)

TOOLS APPLICATION MANAGER DASHBOARD REPORTS CONFIGURE SUPPORT

TOOLS

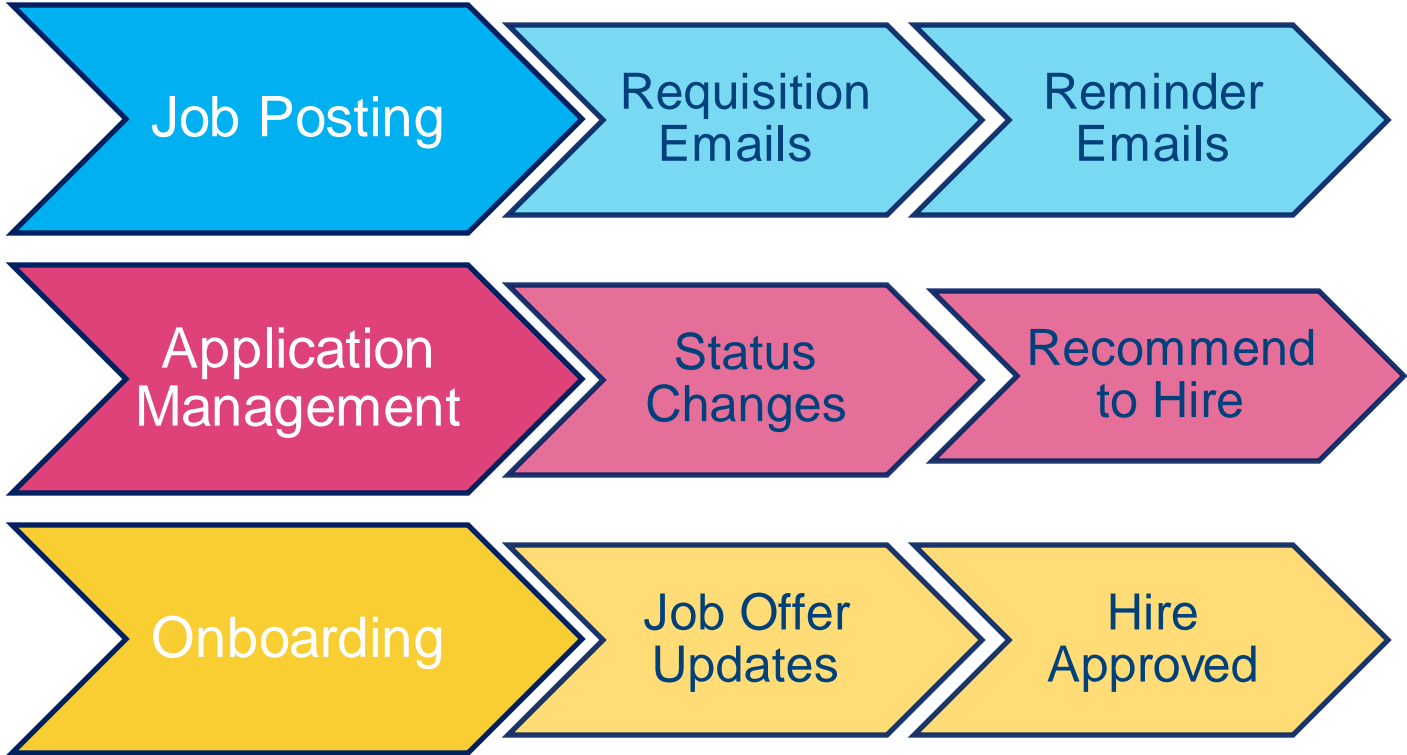
- Posting Management**
 - Job Postings
- Application Management**
 - Application Manager
- Interviews & Re...**
 - My Interviews
- Document Library**
 - Document Library
- Candidate Customer Service**
 - Candidate FAQ
- Forms Exchange**

Communication Tools

- Staff Email Notices
- Candidate Email Notices
- System Email Notices
- Email Templates

P-WB-63D3A9326D
Time Zone: Central Standard Time
Time: 1/27/2023 6:45:14 PM
CID: 10391 COID: 11895
10.0.7.76
TECH: caMansanasandBox
DEVELO: EN: SE

Notifications Timeline

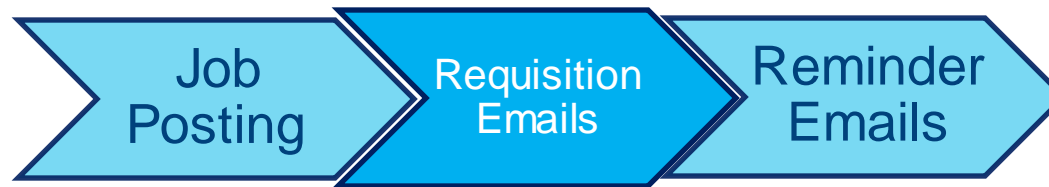




 Administrator



 Human Resources



SYSTEM EMAIL NOTIFICATIONS

Event	Action Taken	Enabled	
Hire Approved	Email	True	EDIT
Requisition Approved ★	Email	True	EDIT
Requisition Denied Approval ★	Email	True	EDIT
Hire Denied Approval	Email	True	EDIT
Requisition Assigned to Job Pool ★	Email	True	EDIT
Requisition Assigned to Job Pool	Email	True	EDIT
Hire Revision Requested	Email	True	EDIT
Requisition Revision Requested ★	Email	True	EDIT
Job Posting Reminder	Email	True	EDIT
External Job Board Email	Email	False	EDIT

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- Automatically generated by events
- Must be enabled
- Sent to the person who initiated the task

EDIT SYSTEM E-MAIL NOTIFICATION

System Event **Requisition Approved**

If this notification is enabled, the submitter of a Requisition will receive an e-mail with the subject, message and appended information when the Requisition has been approved.

Enable this Action * Yes No

Action **E-mail**

E-mail Subject *

E-mail Message *

Select E-Mail Template

Appended Information

P-V
Tim
CID

- Can be edited
- Details of the recipient included
- Appended Information included in the email



STAFF EMAIL NOTIFICATIONS

Filter Events By:

Select	Event	Action Taken	Enabled	Recipient	Edit
<input type="checkbox"/>	Applicant Red Flagged	Email	Yes	Martinez, Zoe	<input type="button" value="EDIT"/>
<input type="checkbox"/>	Job Offer Finalized	Email	Yes	Smith, Amy	<input type="button" value="EDIT"/>
<input type="checkbox"/>	Job Offer Sent	Email	Yes	Smith, Amy	<input type="button" value="EDIT"/>
<input type="checkbox"/>	Recommend To Hire	Email	Yes	Martinez, Zoe	<input type="button" value="EDIT"/>
<input type="checkbox"/>	Requisition Pending Approval	Email	Yes	Smith, Amy	<input type="button" value="EDIT"/>

1

- Automatically generated by events
- The recipient will receive a notification *every time* the event occurs

EDIT STAFF EMAIL NOTIFICATION

Event *

Enabled *

Action **Email**

Recipient *

Email Subject *

Email Body *

B I U A A FONT SIZ...

Select Email from Template

- Can be edited
- The recipient can be defined
- Only one recipient per notification



SYSTEM EMAIL NOTIFICATIONS

Event	Action Taken	Enabled	
Hire Approved	Email	True	EDIT
Requisition Approved	Email	True	EDIT
Requisition Denied Approval	Email	True	EDIT
Hire Denied Approval	Email	True	EDIT
Requisition Assigned to Job Pool	Email	True	EDIT
Requisition Assigned to Job Pool	Email	True	EDIT
Hire Revision Requested	Email	True	EDIT
Requisition Revision Requested	Email	True	EDIT
Job Posting Reminder ★	Email	True	EDIT
External Job Board Email	Email	False	EDIT



TOOLS APPLICATION MANAGER DASHBOARD REPORTS AN

TOOLS

Posting Management

Job Postings
Requisitions
Requisition Approval

Application Management

Application Manager

Interviews & Recommendations

My Interviews
Hiring Approvals

Document Library

Document Library

Candidate Customer Service

Candidate FAQ
Candidate Questions

APPROVED REQUISITIONS PENDING POSTINGS ACTIVE POSTINGS CLOSED ALL ARCHIVED

Results 1-2 of 2

<input type="checkbox"/>	Posting ID	Title	Location	Open(Int)	Close(Int)	Open(Ext) ▼	Close(Ext) ▼	Status	
<input type="checkbox"/>	11	Bus Driver	Central Office	02/01/2023	-	09/09/2023	-	Active	PRINT CLONE EDIT
<input type="checkbox"/>	8	Future Certified Positions	Central Office	-	-	03/01/2015	-	Active	PRINT CLONE EDIT ↻

EMAIL NOTIFICATIONS

Notifications will be sent when the job is posted. Reminders will be sent at selected time.

Reminder: UPDATE ALL

Amy Smith	<input type="text" value="1 week before close date"/>	✗
Zoe Martinez	<input type="text" value="None"/>	✗

ADD RECIPIENTS

JOB APPLICATION TIMEFRAMES

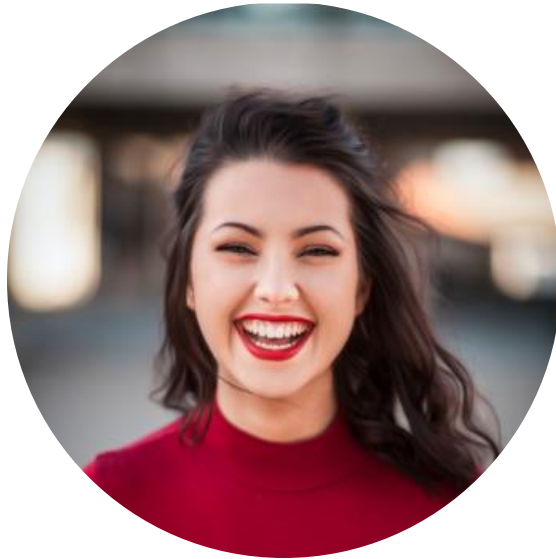
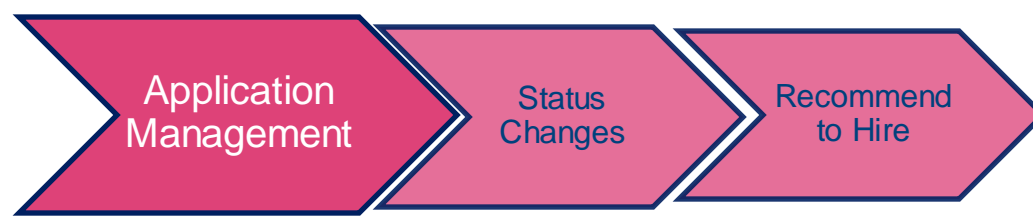
* You are required to define at least one begin date.

Internal Application Timeframes (Central Standard Time)

Begin:

External Application Timeframes (Central Standard Time)

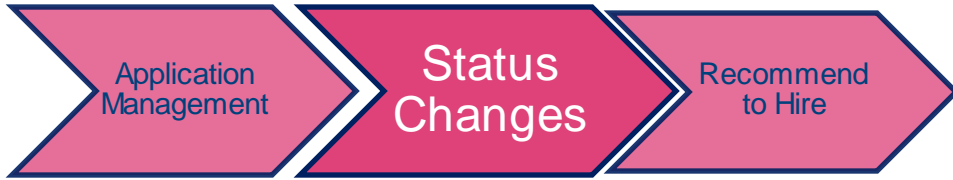
Begin:



Candidate



Human Resources



APPLICATION MANAGER

TOOLS APPLICATION MANAGER DASHBOARD REPORTS

-- Select a Saved Search -- NEW SEARCH HIDE CLEAR

1 Posting ID Equals 9

ADD CLEAR SAVE AS SEARCH

Search

ACTIVE DEACTIVATED ALL

VIEW: Default View

Results: 1-3 of 3

<input type="checkbox"/>	Last Name	First Name	Conf#	Status	App Date	Posting ID	Position Title	
<input type="checkbox"/>	Anderson	Alex	10	Hired	02/01/2023	9	Future Classified Positions	
<input type="checkbox"/>	test	test1	9	Position Filled/Closed	08/11/2016	9	Future Classified Positions	
<input type="checkbox"/>	Smith	Charlie	7	Position Filled/Closed	02/10/2015	9	Future Classified Positions	



APPLICATION MANAGER

Next Applicant »

PROFILE UPDATED: 02/01/23 CID# 7 PID# 9

Alex Anderson
Future Classified Positions

EMAIL RED FLAG INTERNAL BEGIN HIRE PROFILE

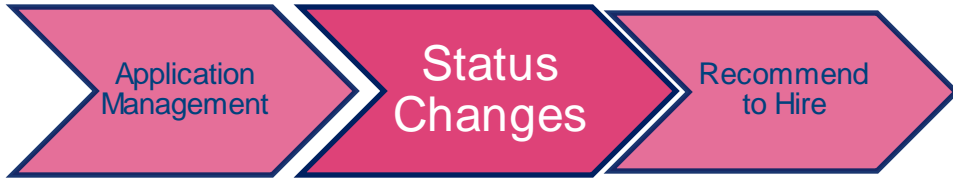
APP DOCS INTERVIEW REFERENCE BACKGROUND HQ TASK SCREENING CONTACT NOTES

Application Date	Posting Title	Active	Status	Prescreen Rating	Hired
02/01/2023 1:07 PM	Future Classified Positions	No	Hired	Approved	1

HIRE ACTIONS

Selected actions will occur when the hire is approved.

- Set job posting status to Filled
- Deactivate all applications not hired for this job posting and set their application status to **Position Filled/Closed**
- Send email notification to applicants not hired that their application status has changed
- Send hired email notification to hired applicant
- Set hired applicant as Internal
- Deactivate all other applications for the Hired Candidate and set their application status to **Inactive**



APPLICATION MANAGER

-- Select a Saved Search -- NEW SEARCH

Search Start typing to search on First Name, Last Name or Position Title.

ACTIVE DEACTIVATED ALL VIEW: Default View

Results 1-7 of 7

<input checked="" type="checkbox"/>	Last Name	First Name	Conf#	Status	App Date	Posting ID	Position Title
<input checked="" type="checkbox"/>	Smith	Charlie	8	Application Received	02/10/2015	8	Future Certified Positions
<input checked="" type="checkbox"/>	Smith	Charlie	6	Application Received	06/22/2012	5	Future Cla
<input checked="" type="checkbox"/>	Four	Applicant	5	Application Received	09/09/2008	2	Head Trac
<input checked="" type="checkbox"/>	Three	Applicant	4	Application Received	09/09/2008	1	Bus Driver
<input checked="" type="checkbox"/>	Two	Applicant	3	Application Received	09/09/2008	3	High Scho
<input checked="" type="checkbox"/>	Smith	Charlie	2	Application Received	09/09/2008	3	High Scho
<input checked="" type="checkbox"/>	Smith	Charlie	1	Application Received	09/09/2008	2	Head Trac

Results 1-7 of 7 Select All (7) Clear Selected (7) Export Results

Results per Page Jump to Page 1

Bulk Actions: GO

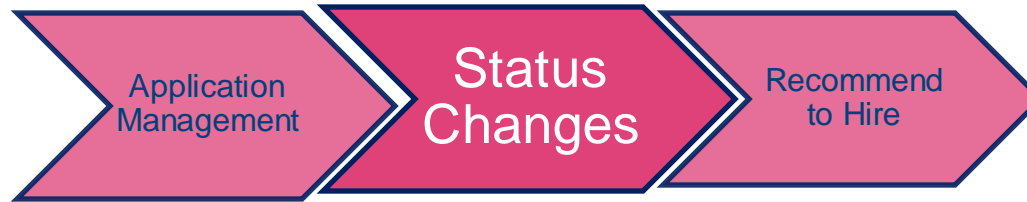
Application Actions

- Activate
- Deactivate
- Add Highlights
- Application Status
- Application Prescreen Rating
- Archive Application
- Print
- Print Packet

Candidate Actions

- Interview
- Email
- Invite to Career Day
- Make Internal
- Remove Internal
- Reference Check Survey

ADVANCED CONFIGURATION



CANDIDATE EMAIL NOTIFICATIONS

Status	Enabled	Event	Subject
	No	Application Status Change	Your Application Status has Changed
Inactive	Yes	Application Status Change	Your Application Status has Changed
Hired	Yes	Application Status Change	Your Application Status has Changed
Pending	Yes	Application Status Change	Your Application Status has Changed
Incomplete	Yes	Application Status Change	Your Application Status has Changed
Filled/Closed	Yes	Application Status Change	Your Application Status has Changed
Under Review	Yes	Application Status Change	Your Application Status has Changed
Hired for Other Position	Yes	Application Status Change	Your Application Status has Changed

EDIT CANDIDATE E-MAIL NOTIFICATION

System Event: Application Status Change

If this notification is enabled, each candidate will receive an e-mail with the subject, message and appended information when the status of his or her application has changed.

Enable this Action * v

Action: E-mail

Application Status: Inactive

E-mail Subject*

E-mail Message *

Dear Applicant,

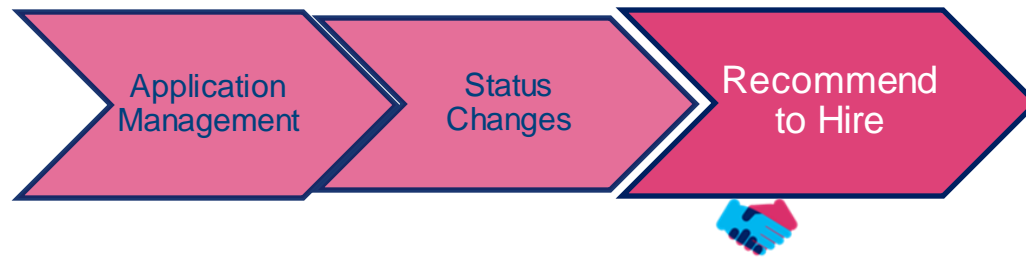
 The status of your application has changed. Below you will find a summary of the changes. You may find more details regarding the status of your application at any time by visiting the careers web site.

Select E-Mail Template

Appended Information: Candidate Name, Position Name, Position ID, Application Date, Job Category

- Automatically generated by events if enabled

- Can be edited
- Details of the recipient included
- Appended Information included in the email



STAFF EMAIL NOTIFICATIONS

Filter Events By: **Event**

Select	Event
<input type="checkbox"/>	Applicant Red Flagged
<input type="checkbox"/>	Job Offer Finalized
<input type="checkbox"/>	Job Offer Sent
<input type="checkbox"/>	Job Posting Reminder
<input type="checkbox"/>	Recommend To Hire
<input type="checkbox"/>	Requisition Pending Approval

- Job Offer Declined
- Job Offer Finalized
- Job Offer Rescinded
- Job Offer Sent
- Job Posted
- Job Posting Reminder
- Job Status Change
- Position Approved
- Position Denied Approval
- Position Pending Approval
- Question Answer
- Question Submit
- Recommend To Hire**
- Reference Survey Certified Returned
- Reference Survey Classified Returned
- Requisition Approved
- Requisition Denied Approval
- Requisition Pending Approval
- Requisition Revision Requested

SEARCH

Enabled	Recipient	Edit
Yes	Martinez, Zoe	EDIT
Yes	Smith, Amy	EDIT
Yes	Smith, Amy	EDIT
Yes	Smith, Amy	EDIT
Yes	Martinez, Zoe	EDIT
Yes	Smith, Amy	EDIT

CANCEL DELETE ADD

Copyright Subscription Agreement

Test Subject

Dear Edie,

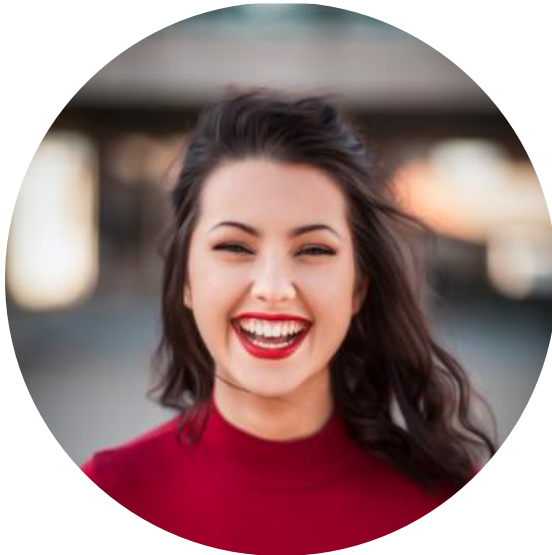
TalentEd Support has recommended Charlie Smith to be hired for Head Track and Field Coach (2).

Test text, this is the body of the email that you can edit

[Click here](#) to begin hire for applicant.

You may review the recommendation to hire here: [Recommend To Hire Profile for Charlie Smith: Applicant Folder](#)
Job Location: Central Office

- Automatically generated by events
- The recipient will receive a notification *every time* the event occurs



Candidate



Human Resources



Administrator



CANDIDATE EMAIL NOTIFICATIONS

Status	Enabled	Event	Subject	
	No	Application Status Change	Your Application Status has Changed	EDIT
Inactive	Yes	Application Status Change	Your Application Status has Changed	EDIT
Hired	Yes	Application Status Change	Your Application Status has Changed	EDIT
Pending	Yes	Application Status Change	Your Application Status has Changed	EDIT
Incomplete	Yes	Application Status Change	Your Application Status has Changed	EDIT
Filled/Closed	Yes	Application Status Change	Your Application Status has Changed	EDIT
Under Review	Yes	Application Status Change	Your Application Status has Changed	EDIT
Hired for Other Position	Yes	Application Status Change	Your Application Status has Changed	EDIT
	Yes	Application Submit	Your Application was Received	EDIT
	No	Application Submit via CERRA Import	Your Application was Received	EDIT
	No	Gallup Screening	Screening Requested	EDIT
	No	Hire Approved	You have been hired	EDIT
	Yes	Interview Accept	Confirmation of Interview	EDIT
	Yes	Interview Decline	You have declined an interview.	EDIT
	Yes	Interview Schedule Request	Interview Request	EDIT
	★ Yes	Job Offer Sent	You have been offered a job by [District_Name]	EDIT
	No	OneSource Background Check	[District_Name] - One Source Background Check	EDIT
	No	Polaris Screening	N/A	EDIT

EDIT STAFF EMAIL NOTIFICATION

Event *

Enabled *

Action

Recipient *

Email Subject *

Email Body *

- Hire Pending Approval
- Hire Revision Requested
- Hire Submitted
- Interview Complete
- Job Offer Accepted
- Job Offer Declined
- Job Offer Finalized
- Job Offer Rescinded
- Job Offer Sent
- Job Posted
- Job Posting Reminder
- Job Status Change
- Position Approved
- Position Denied Approval
- Position Pending Approval
- Question Answer
- Question Submit
- Recommend To Hire
- Reference Survey Certified Returned
- Reference Survey Classified Returned



APPLICATION MANAGER

TOOLS APPLICATION MANAGER DASHBOARD REPORTS

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ACTIVE DEACTIVATED ALL VIEW: Default View

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APPLICATION MANAGER

Next Applicant »

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Alex Anderson
Future Classified Positions

EMAIL RED FLAG INTERNAL BEGIN HIRE PROFILE

APP DOCS INTERVIEW REFERENCE BACKGROUND HQ TASK SCREENING CONTACT NOTES

Application Date	Posting Title	Active	Status	Prescreen Rating	Hired
02/01/2023 1:07 PM	Future Classified Positions	No	Hired		Approved



WORKFLOW

Approval Workflow* [dropdown]

Status **Not Submitted**

Approval Path N/A

JOB OFFER

Template [dropdown] Preview and Send Job Offer

STATUS

CANCEL SAVE DRAFT SUBMIT



CANDIDATE EMAIL NOTIFICATIONS

Status	Enabled	Event	Subject	
	No	Application Status Change	Your Application Status has Changed	EDIT
Inactive	Yes	Application Status Change	Your Application Status has Changed	EDIT
Hired	Yes	Application Status Change	Your Application Status has Changed	EDIT
Pending	Yes	Application Status Change	Your Application Status has Changed	EDIT
Incomplete	Yes	Application Status Change	Your Application Status has Changed	EDIT
Filled/Closed	Yes	Application Status Change	Your Application Status has Changed	EDIT
Under Review	Yes	Application Status Change	Your Application Status has Changed	EDIT
Hired for Other Position	Yes	Application Status Change	Your Application Status has Changed	EDIT
	Yes	Application Submit	Your Application was Received	EDIT
	No	Application Submit via CERRA Import	Your Application was Received	EDIT
	No	Gallup Screening	Screening Requested	EDIT
	★ Yes	Hire Approved		
	Yes	Interview Accept		

EDIT STAFF EMAIL NOTIFICATION

Event *

Enabled *

Action

Recipient *

Email Subject

Email Body

CANCEL SAVE

- Applicant Red Flag Removed
- Applicant Red Flagged
- Application Submit
- Application Submit via CERRA Import
- Background Check Complete
- External Job Board Email
- Hire Approved
- Hire Denied Approval
- Hire Pending Approval
- Hire Revision Requested
- Hire Submitted
- Interview Complete
- Job Offer Accepted
- Job Offer Declined
- Job Offer Finalized
- Job Offer Rescinded
- Job Offer Sent
- Job Posted
- Job Posting Reminder
- Job Status Change

SYSTEM EMAIL NOTIFICATIONS

Event	Action Taken	Enabled	
Hire Approved ★	Email	True	EDIT
Requisition Approved	Email	True	EDIT
Requisition Denied Approval	Email	True	EDIT
Hire Denied Approval ★	Email	True	EDIT
Requisition Assigned to Job Pool	Email	True	EDIT
Requisition Assigned to Job Pool	Email	True	EDIT
Hire Revision Requested ★	Email	True	EDIT
Requisition Revision Requested	Email	True	EDIT
Job Posting Reminder	Email	True	EDIT
External Job Board Email	Email	False	EDIT

SYSTEM EMAIL NOTIFICATIONS

Event

Hire Approved
Requisition Approved
Requisition Denied Approval
Hire Denied Approval
Requisition Assigned to Job Pool
Requisition Assigned to Job Pool
Hire Revision Requested
Requisition Revision Requested
Job Posting Reminder
External Job Board Email

- Automatically generated by events
- Must be enabled
- Sent to the person who enabled the task
- Can be edited
- Details of the recipient included
- Appended Information included in the email

STAFF EMAIL NOTIFICATIONS

Filter Events By:

Select **Event**

- Applicant Red Flagged
- Job Offer Finalized
- Job Offer Sent
- Recommend To Hire
- Requisition Pending Approval

- Automatically generated by events
- The recipient will receive a notification *every time* the event occurs
- Can be edited
- The recipient can be defined
- Only one recipient per notification

CANDIDATE EMAIL NOTIFICATIONS

Status	Enabled	Event
	No	Application Status Change
Inactive	Yes	Application Status Change
Hired	Yes	Application Status Change
Pending	Yes	Application Status Change
Incomplete	Yes	Application Status Change
Filled/Closed	Yes	Application Status Change
Under Review	Yes	Application Status Change
Hired for Other Position	Yes	Application Status Change

- Automatically generated by events if enabled
- Can be edited
- Details of the recipient included
- Appended Information included in the email



PowerSchool

Employee Records & Onboarding

Customizing Security Settings

Agenda

1 Customizing Security

2 Planning it out

3 Types of Security

4 Scenarios

5 Q&A

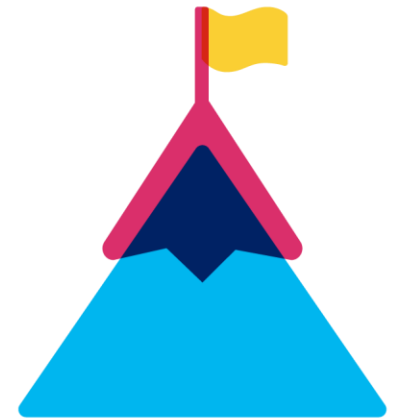
Customizing Security

- Standard vs. Custom Security
- Standard
 - Already set up
- Custom
 - Needs to be set up
 - Can be used to meet more specific needs



Planning it out

- Who needs to be able to view staff members (and which staff members)
- Do those people need to be the staff member's supervisor, or just have access to their folder?
- Who needs to be able to submit available forms (and for whom)?
- Who needs different security access in order to complete different tasks within the system?



Types of Security

Security Groups

Supervisor/Direct Report Relationships

Folder Security

Security

[Add Security Group](#) [Need help?](#)

	<i>System Admin</i>	<i>HR Staff</i>	<i>Staff</i>	<i>USCIS</i>	<i>All Review</i>
Direct Report/Supervisor Security					
View all users at a given location or with a given job type	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
View all users at a given location and with a given job type	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
View all staff	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>

Supervisor

Demographics Job Types Direct Reports **Supervisors**

Search:

Supervisor List [+ Add Supervisors](#)

DR/Sup Folder Security	Viewable By:
Certifications	<input type="text" value="Security Level & Self"/> <input type="button" value="v"/>
Contracts & Agreements	<input type="text" value="Security Level & Self"/> <input type="button" value="v"/>
Discipline	<input type="text" value="Security Level"/> <input type="button" value="v"/>

Types of Security

Security Groups

Security

[Add Security Group](#) [Need help?](#)

	<i>System Admin</i>	<i>HR Staff</i>	<i>Staff</i>	<i>USCIS</i>	<i>All Review</i>
Direct Report/Supervisor Security					
View all users at a given location or with a given job type	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
View all users at a given location and with a given job type	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
View all staff	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>

- Gives access to Configuration & Features
- Gives access to Employees
- Gives access to Folders

Types of Security

Supervisor/Direct Report Relationships

- Gives access to Employees
- Gives access to Folders

Supervisor

Demographics Job Types Direct Reports **Supervisors**

Search:

Supervisor List + Add Supervisors

Types of Security

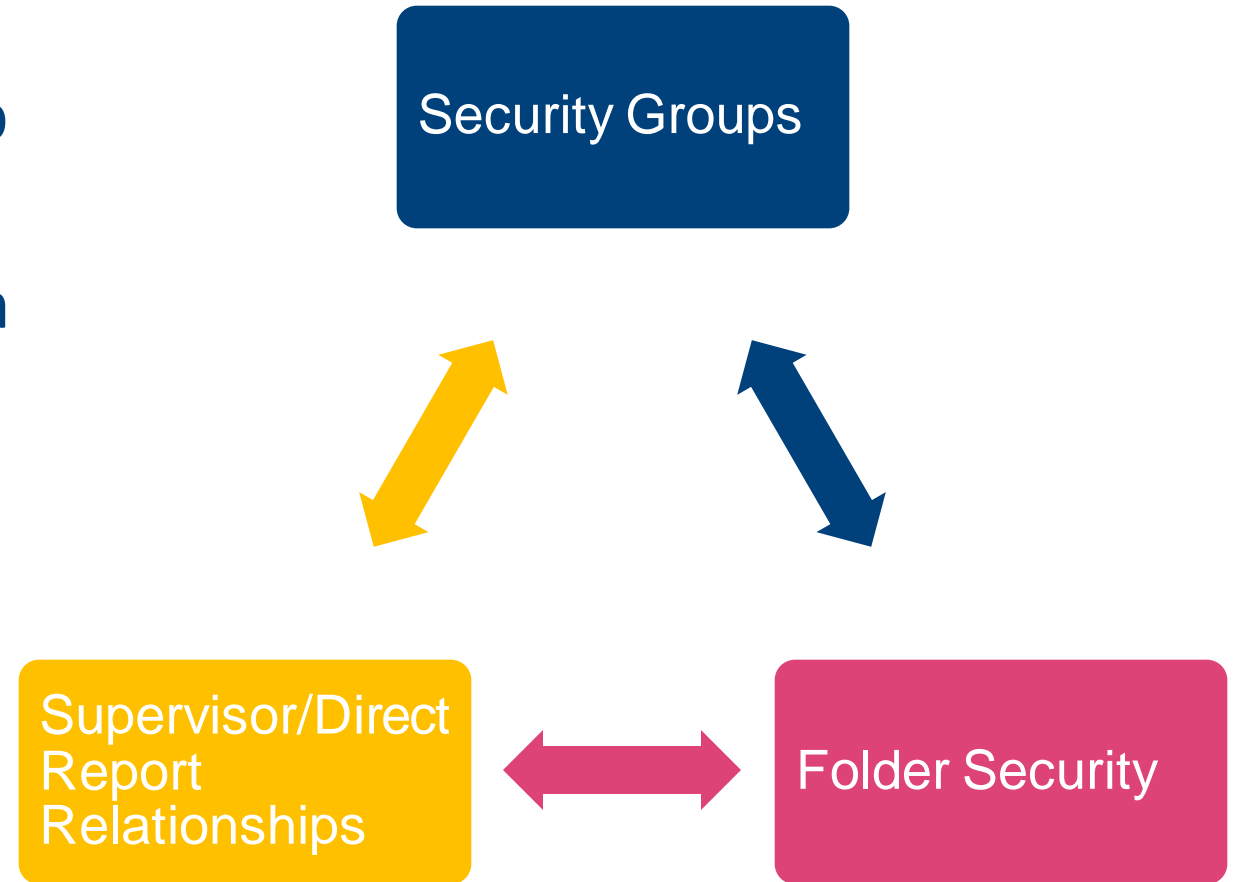
Folder Security

- Gives access to Folders

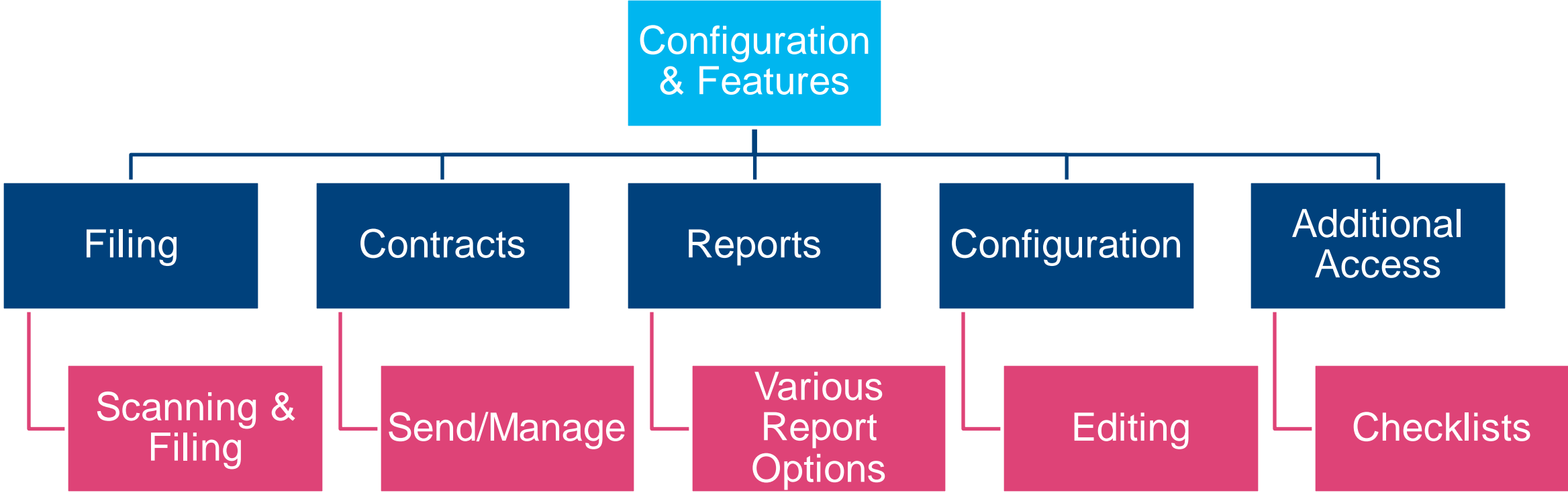
DR/Sup Folder Security	Viewable By:
Certifications	Security Level & Self <input type="button" value="v"/>
Contracts & Agreements	Security Level & Self <input type="button" value="v"/>
Discipline	Security Level <input type="button" value="v"/>

Types of Security

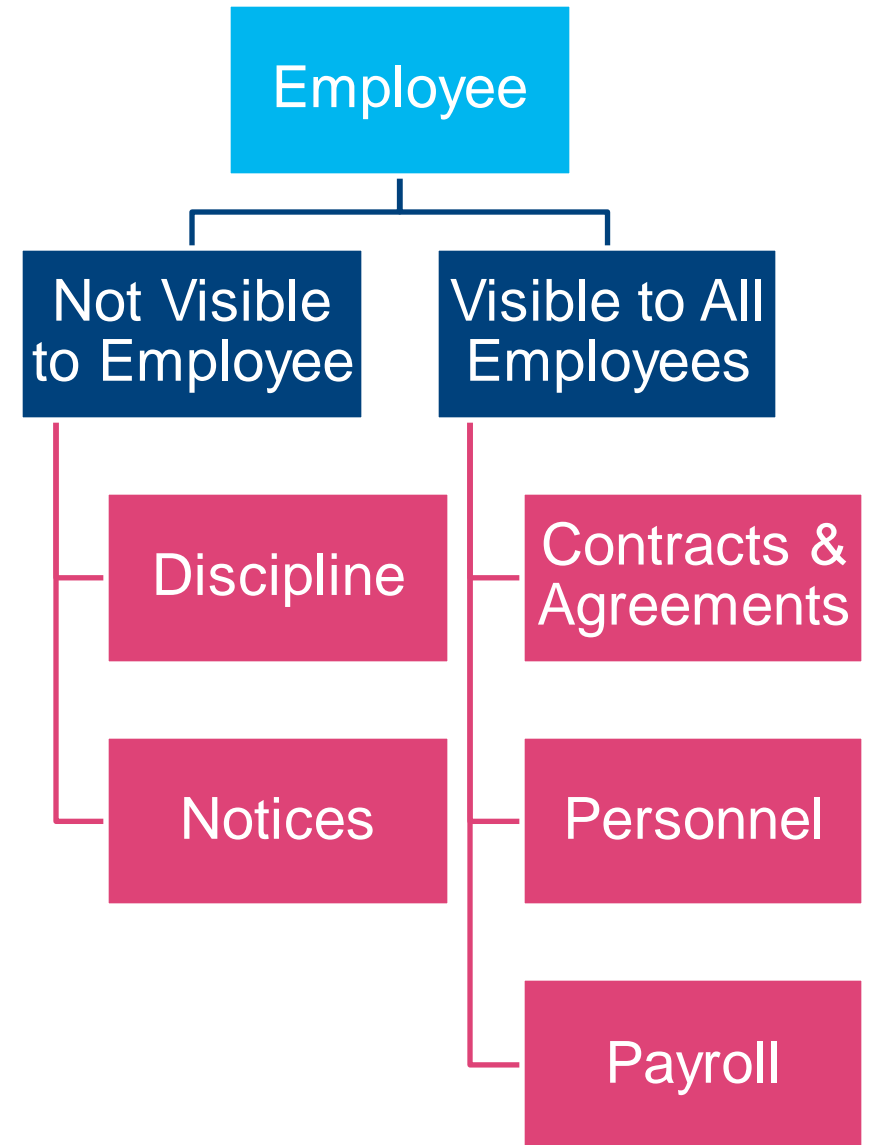
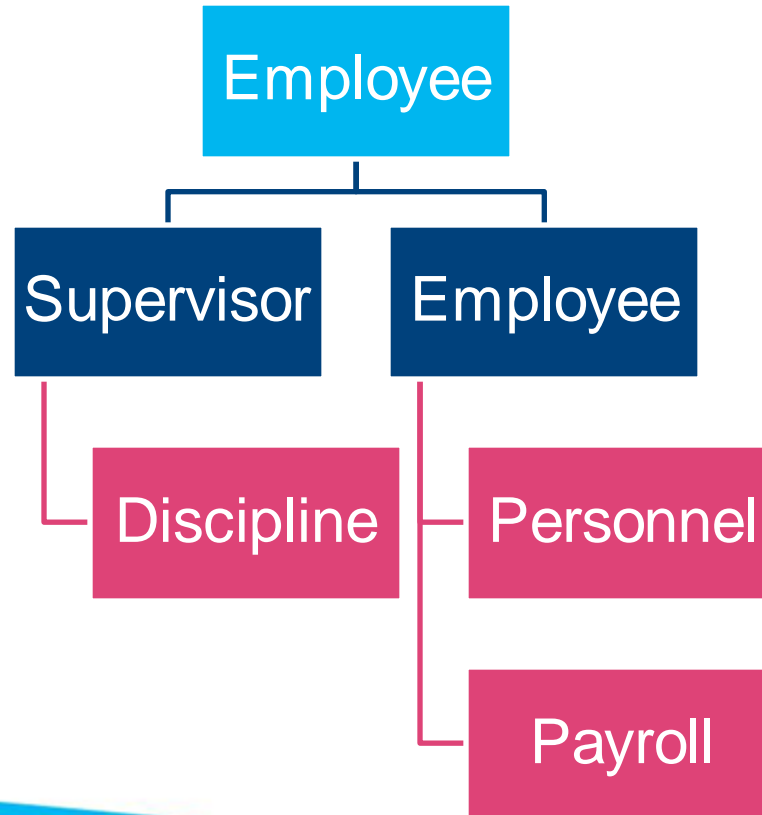
- Understanding the relationship is necessary
- Important to think about when making customized security



Configuration & Features

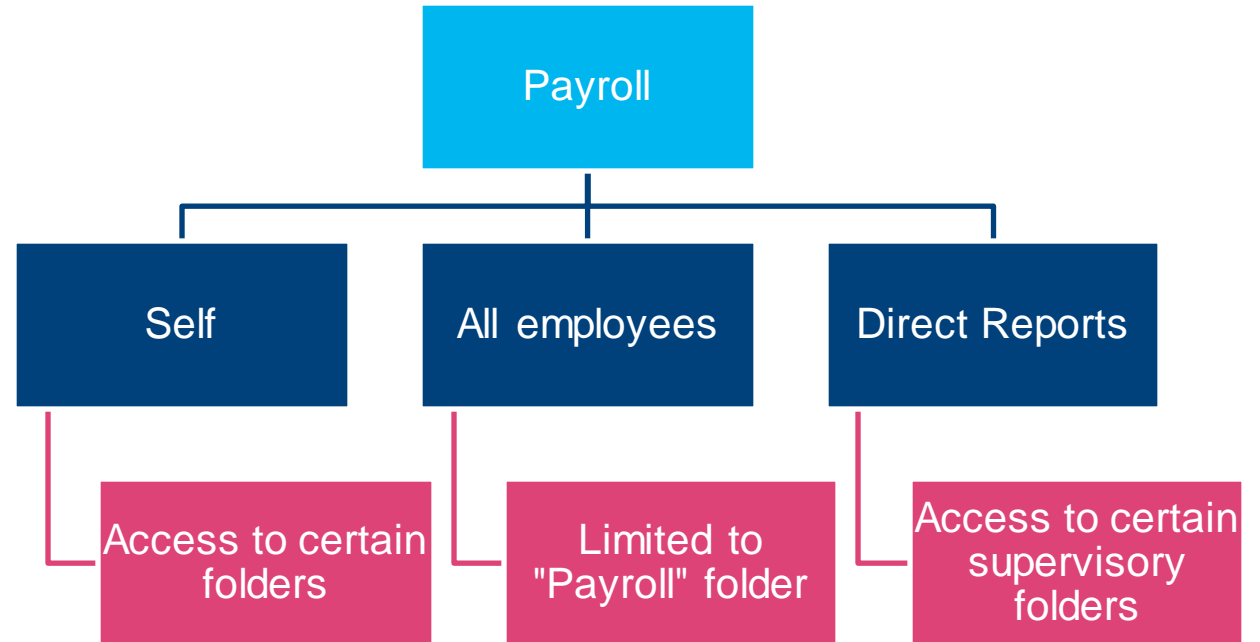


Employee Visibility & Folder Visibility



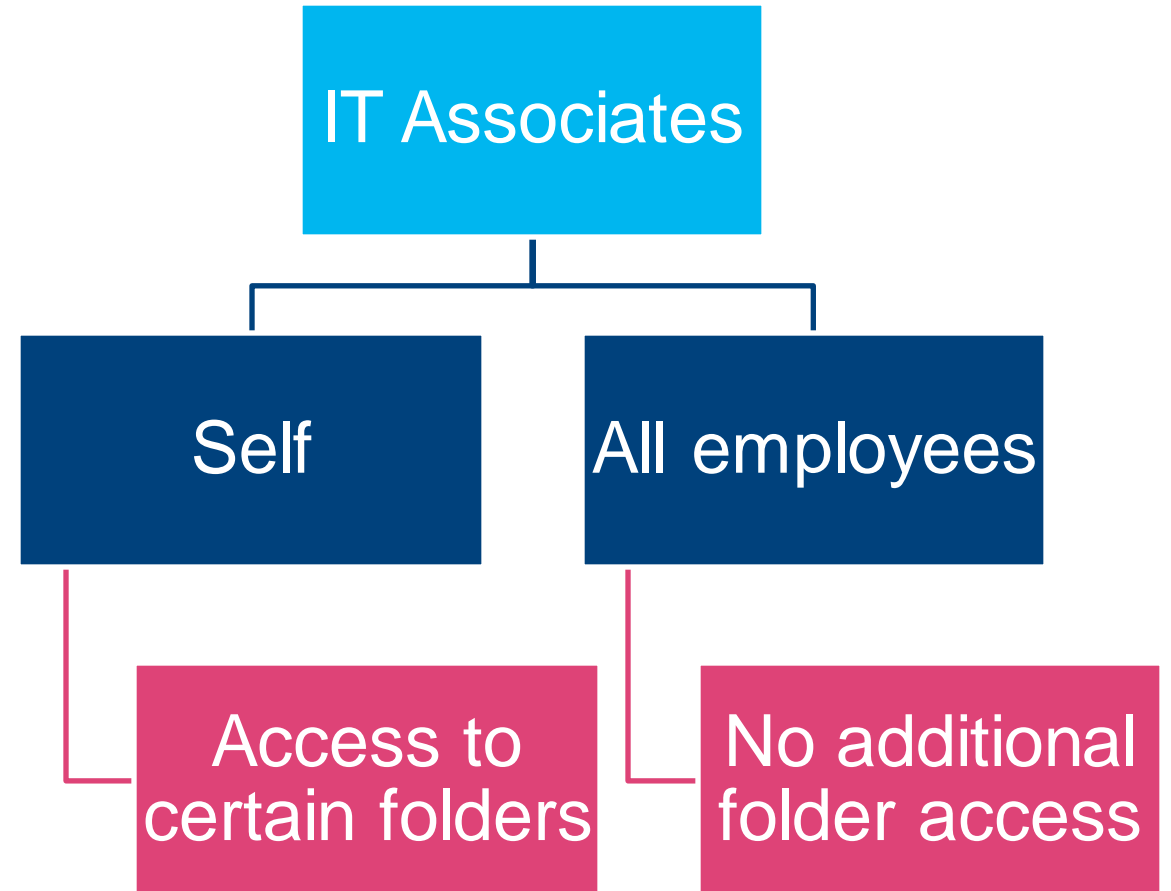
Scenario

- Payroll who is a Supervisor
 - Custom Security Group
 - Access to all staff
 - Does not need additional permissions
 - Folder access, only "Payroll"
 - Supervisor/Direct Report
 - All Direct Reports assigned to this person
 - Folder Security
 - Access to "& Self" for any folders all staff should see
 - Access to "& Supervisor Only" for any folder that they need access to for their Direct Reports



Scenario

- IT Associates
 - Custom Security Group
 - Access to all staff
 - Does not need additional permissions
 - Supervisor/Direct Report
 - Is not a supervisor
 - Folder Security
 - Access to "& Self" for any folders all staff should see



Other Scenarios?

- Do you have a unique way you are using security?
- Do you have an example that you would like to talk through?





PowerSchool

Perform

Effective Meeting Management Using Scheduling

Agenda

- 1 Why Use Perform for Scheduling
- 2 Deadlines and Due Dates
- 3 Scheduling Deadlines and Meetings
- 4 Managing Meetings
- 5 Review - Q&A

Why?

You can keep all your deadlines and meetings in one place

- Perform has calendar integration

Everyone is on the same page

- It provides a place for direct reports and supervisors to verify dates and times

Helps prioritize important tasks

- Direct Reports can see all due dates

Goals become more achievable

- Allows you to break down each part into steps

Progress is easier to track

- HR can monitor and provide support to those who need it.



Deadlines & Due Dates

Process	Scheduled	Due
Non Continuing Contract Teacher- Year 1	🕒 09/01/2022	
Non Continuing Contract Teacher- Year 1	🕒 09/15/2022 11:00 AM	
Non Continuing Contract Teacher- Year 1	🕒 09/01/2023	
Non Continuing Contract Teacher- Year 1	🕒 03/01/2023	

Scheduling

- Used by supervisor to communicate with direct report
- Supervisor can change
- Can be done for meetings, forms, and tasks

Process	Scheduled	Due
Non Continuing Contract Teacher- Year 1		10/01/2023
Non Continuing Contract Teacher- Year 1		09/15/2023
Non Continuing Contract Teacher- Year 1		
Non Continuing Contract Teacher- Year 1		12/01/2023

Due Dates

- Used by HR to set deadlines
- Supervisor cannot change
- Can be done for meetings, forms, and tasks

Deadlines and Due Dates

Administrators can assign tasks and meetings to evaluators and direct reports in the system with due dates.



Add Task

Task:

- To Do
- Meeting
- Processes and Forms

To Do Information

A task to complete

Subject *

Date *

View Tasks

Ivan Herrera - Non Continuing Contract Teacher- Year 1

(13) Tasks

#	Task	Sched	Comp	Responsible	Resp Type	
	Goal Setting - 0 / 3 *					<input type="button" value="Assign"/>
	Observations - 0 / 5 *					<input type="button" value="Assign"/>
	Summative - 0 / 2 *					<input type="button" value="Assign"/>
	Task Group - 0 / 2 *					<input type="button" value="Assign"/>
	Second Semester Walkthrough *	02/14		H. Adams	Supervisor	<input type="button" value="Mark as Done"/> <input type="button" value="Reschedule"/> <input type="button" value="Reassign"/> <input type="button" value="Remove"/>

Show information at time of process completion

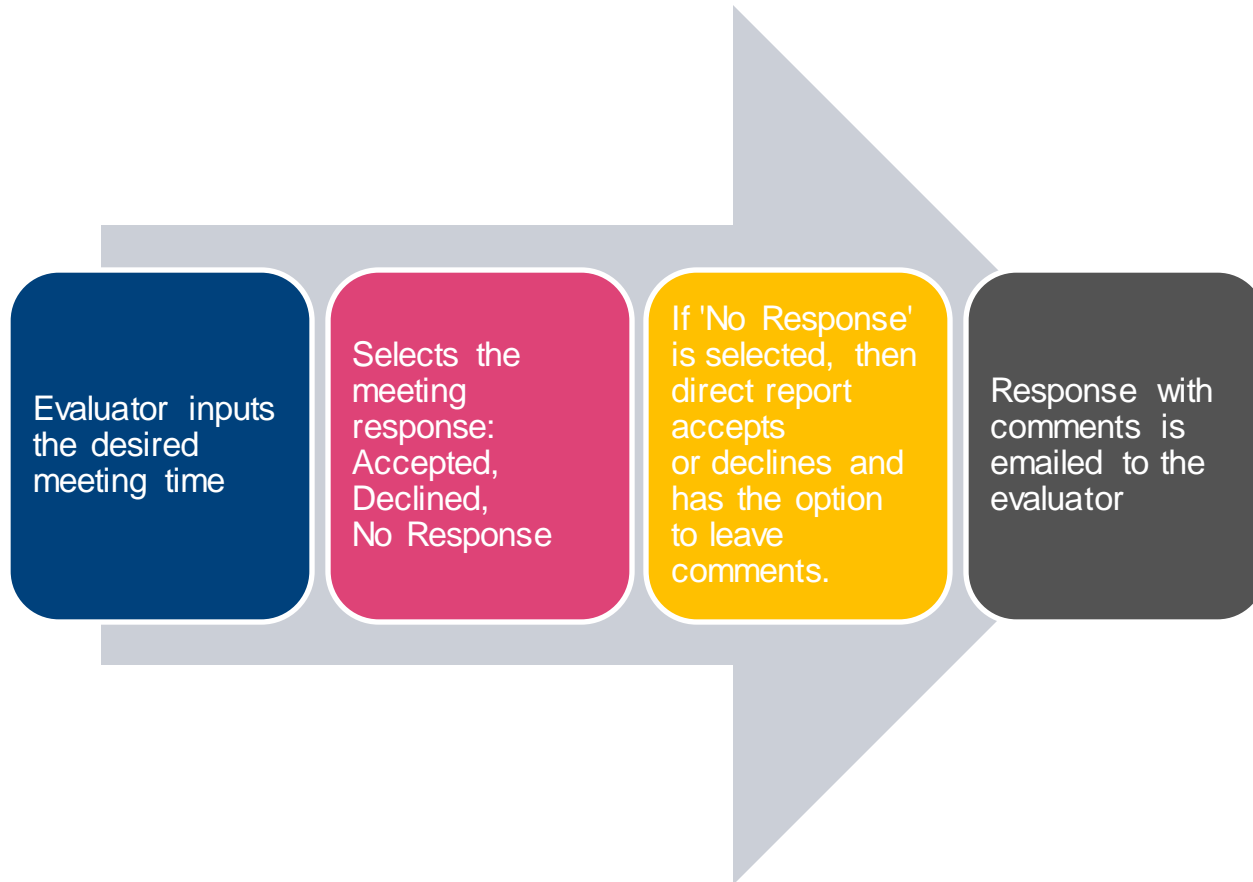
Scheduling Deadlines & Meetings

Meetings can be scheduled by supervisors or evaluators by going into the direct reports folder or using the process dashboard

Comp	Responsible	Resp Type	Walkthrough	Evidence	Folder
					Assign
	I. Herrera	Direct Report			Reschedule Assign
	J. Adams + 2	Supervisor	Mark as Done	Reschedule	Assign
	I. Herrera	Direct Report		Reschedule	Assign Remove
					Assign
	I. Herrera	Direct Report		Reschedule	Assign
	J. Adams + 2	Supervisor	Select Form	Schedule	Assign
	J. Adams + 2	Supervisor	Select Form	Reschedule	Assign
	J. Adams + 2	Supervisor	Mark as Done	Schedule	Assign
	J. Adams + 2	Supervisor	Select Form	Schedule	Assign
					Assign
	J. Adams + 2	Supervisor	Mark as Done	Schedule	Assign

<input type="checkbox"/> Staff (7)	Adhoc Walkthroughs	Goal Setting for Student Prog...	Initial Goal Setting Review
		FORM	MEETING
Ivan Herrera Special Education Teacher	0		Schedule
Cole Russell Kingergarten Teacher	0		Schedule
Maria Russell Prek Teacher	0		Schedule

Managing Meetings



Schedule Task: End of Year Goal Setting Review

Employee Ivan Herrera
Task End of Year Goal Setting Review
Due date n/a
Date * 04/28/2023

Begin Time *

09 : 00

End Time *

09 : 45 AM

Meeting Response *


No Response

Cancel Save

Managing Meetings

Incomplete Tasks Signatures 0

Meeting Requests

Meeting	Date and Time	Organizer	Action
 Initial Goal Setting Review	09/15/2022 at 09:00 AM	Jonathan Adams	Action

Processes Notes History Attachments Profile Evidence

Folder for Ivan Herrera

Respond to Meeting Request

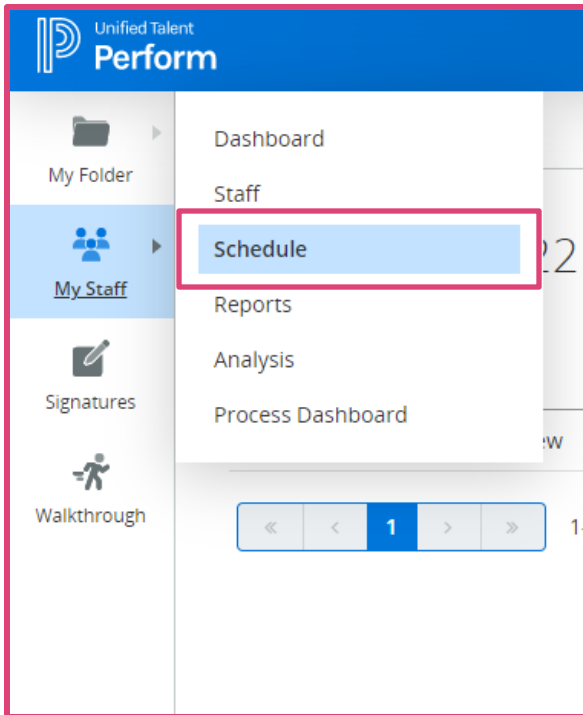
Adams Jonathan has requested a meeting for 09/15/2022 at 9:00:00 AM to 9:45:00 AM. Please respond to this meeting by clicking either the "Accept Meeting" or "Decline Meeting" button below.

Comments to Organizer

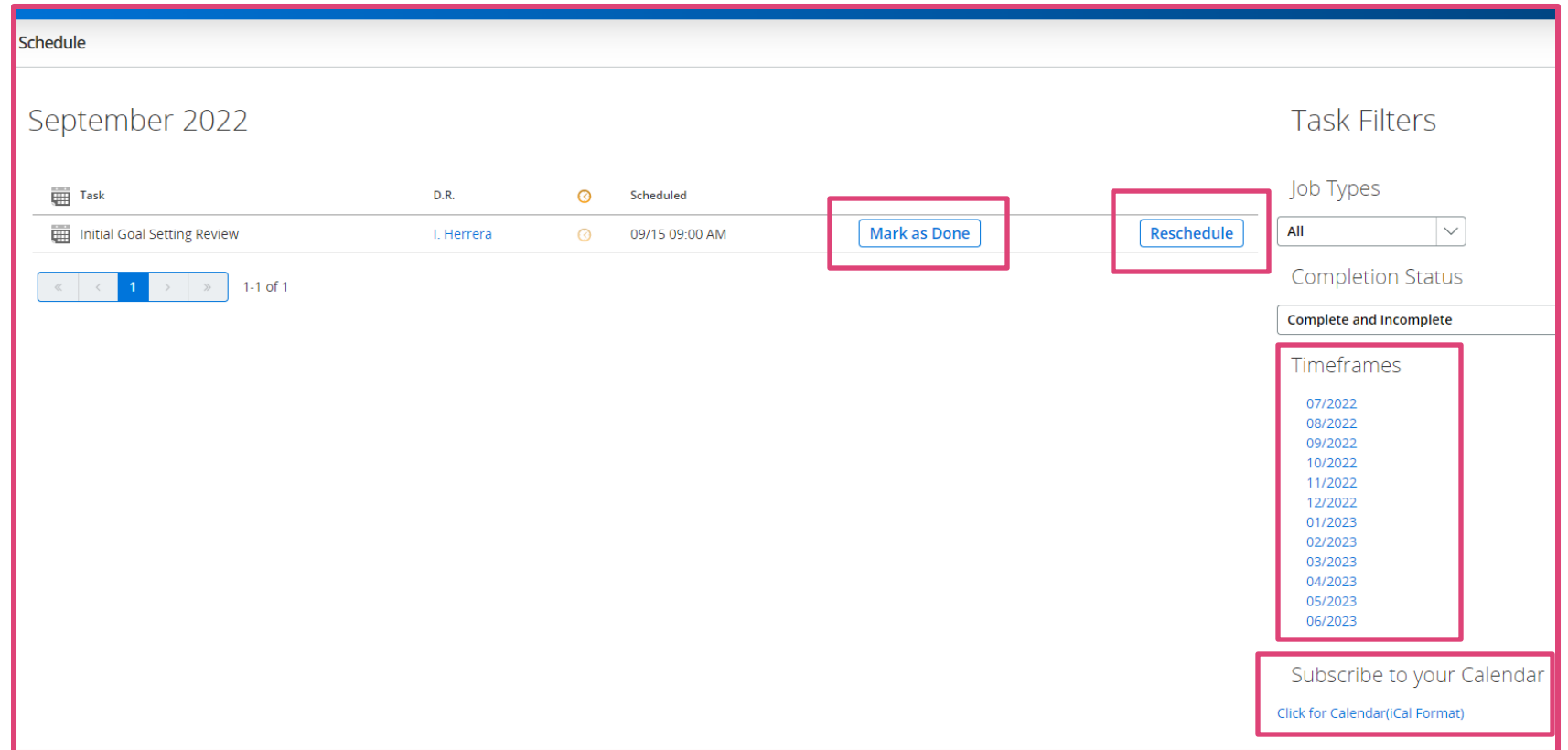
Meeting on this date works great for me, but I would like for you to come in and observe during my third hour.

Managing Meetings

Supervisors can manage their meetings from:



The screenshot shows the 'Unified Talent Perform' navigation menu. The 'Schedule' option is highlighted in blue. Other menu items include Dashboard, Staff, Reports, Analysis, Process Dashboard, Signatures, and Walkthrough.



The screenshot shows the 'Schedule' interface for September 2022. A task titled 'Initial Goal Setting Review' is listed, assigned to 'I. Herrera' and scheduled for '09/15 09:00 AM'. The task status is 'Scheduled'. Two buttons, 'Mark as Done' and 'Reschedule', are visible next to the task. The interface also includes a 'Task Filters' section with 'Job Types' set to 'All' and 'Completion Status' set to 'Complete and Incomplete'. A 'Timeframes' list is shown on the right, ranging from 07/2022 to 06/2023. At the bottom right, there is a 'Subscribe to your Calendar' link with the text 'Click for Calendar(iCal Format)'.

The Impact of Intentional Scheduling



District Admin

Allows districts to support administrators and evaluators



Evaluators

Assists in maintaining accurate records & meeting deadlines

Helps us support teachers and promote campus growth



Educational Staff

Helps teachers create timely goals that support self-growth and impact students



PowerSchool

Professional Learning

Setting up Courses with the End in Mind

Agenda

- 1 Perspective matters: the ‘Who’s’ to keep in mind
- 2 First remember your purpose/goal
- 3 Use the system to tie it together
- 4 Let’s take a look
- 5 Q&A

Perspective Matters

- Professional Learning Stakeholders
 - Decision Makers
 - System Admins
 - Course Creators
 - Professional Development Participants
- What would each persona like?
 - Decision Makers
 - System Admins
 - Course Creators
 - Professional Development Participants



First remember your purpose/goal

- High system usage
- High compliance course completion
- Facilitate high level professional development for district
- Ease of tracking completion
- Ease of reporting relevant information
- Ease of tracking employee professional development



Use the System to Tie It Together

- Courses and Sections creation best practice
- Internal tools to aid in searching and reporting
- Internal tools available to track a series of required courses
- Internal tools available to track individual progress and encourage professional growth

The screenshot shows the Performance Matters system interface. At the top, there is a navigation bar with the 'performance matters' logo and various menu items like Home, Observations, Badges, Courses, etc. The main content area is titled 'District Compliance 21-22' and includes a breadcrumb trail 'PD Playlist Dashboard > District Compliance 21-22'. Below this, there is a 'Moderator: Administrator, PowerSchool' and a 'Released on 06/09/2022' timestamp. A tabbed interface shows 'Status' as the active tab. The main data is presented in a table with the following columns:

NAME	** USING BASEBALL CARD AND EARLY WARNING TO MEASURE EXCESSIVE ABSENCE *	*ARE YOU SMARTER THAN YOUR SMART BOARD? *	*BLOODBORNE PATHOGENS	*MOBILE APPS IN EDUCATION	A STRATEGY FOR STRUCTURING QUESTIONS
Abbott, Pat	✓	✓	⊖	⊖	⊖
Administrator, PowerSchool	✓	✓	⊖	⊖	⊖
Allen, Debbie	✓	✓	⊖	⊖	⊖
Calibration, Beverly	✓	✓	⊖	⊖	⊖
Casey, Linda	✓	✓	⊖	⊖	⊖
Cortez, Jacob	✓	✓	⊖	⊖	⊖
Cox, Megan	✓	✓	⊖	⊖	⊖

Let's Take a Look!

- Course and Section Setup
- Tags
- PD Playlist
- Credit types
- Badging

The screenshot shows the 'Create Instructor Led Course' form in the Performance Matters system. The form is divided into two main sections: 'Details' and 'Settings'.

Details Section:

- Course #:** (Will be auto generated.)
- * Course Title:** [Text input field]
- * Course Description:** [Text area]
- * Course Provider:** [Dropdown menu: Default Provider]
- Disclaimer:** [Text input field]
- Office:** [Dropdown menu: Curriculum and Instruction Office]
- * Credit Types:** A table with columns for Credits, Hours, and Bankable.

	Credits	Hours	Bankable
<input type="checkbox"/> Inservice	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Relicensure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Endorsement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Settings Section:

- Required To:** - No Targets Set -
- Optional To:** - No Targets Set -
- Restricted To:** - No Demographics Set -
- Competencies:** - Not Set -
- Subjects:** - Not Set -



PowerSchool