Welcome to the Unified Talent PowerSchool PowerUp!

Unified Talent

March 2023

Today's Agenda

- Welcome
- 2023 Education Focus Report Survey
- Submitting an Effective Support Case
- Product Update Announcements
  - Perform
  - SchoolSpring
- Breakout Rooms
  - Applicant Tracking
  - Applicant Tracking/Employee Records
  - Employee Records
  - Professional Learning

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2023 Education Focus Report Survey

Tell Us Your Priorities!

We're conducting research for our annual Education Focus Report to help identify priorities for the 2023-2024 school year with industry trends, insights, and guidance. Take our questionnaire today!

Limit the Back-and-Forth with Support

P.L.E.A.S.E. follow our best practices to include the most information in your support case …

P — People Impacted

- What are the names, roles, and email addresses of the impacted user(s)?
- How many people are impacted?

L — Links

- Provide links to where the issue is occurring
- Provide the step-by-step clicks you took to view the behavior or error

E — Expected Behavior

- What are you trying to accomplish?
- What are you expecting to see occur?

A — Actual Behavior

- What is actually happening?
- What is the problem or question?

S — Screenshots

- The more visuals - the better!

E — Effect on Workflow

- How does this inquiry affect your workflow?
- Does the issue interfere with daily tasks?
- Are there any deadlines that are threatened by the issue?

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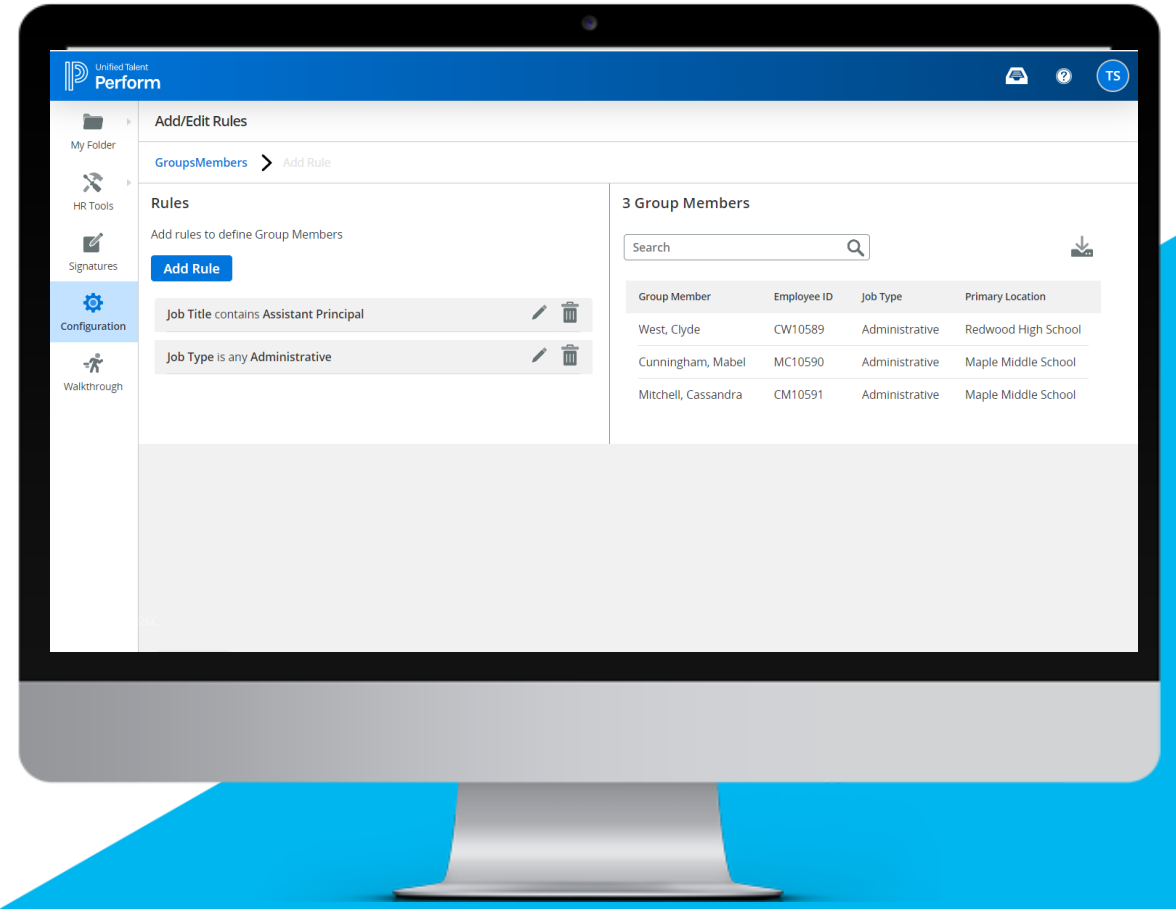
Product Update Announcements

PowerSchool PowerUPs

Dynamically Create Groups in Perform

Re-engineered option to help you leverage Groups throughout Perform without the constant maintenance.



Highlights:

- Set up rules to describe who should be in a group.
- System assigns staff based on rules and keeps the list up to date.

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New SchoolSpring

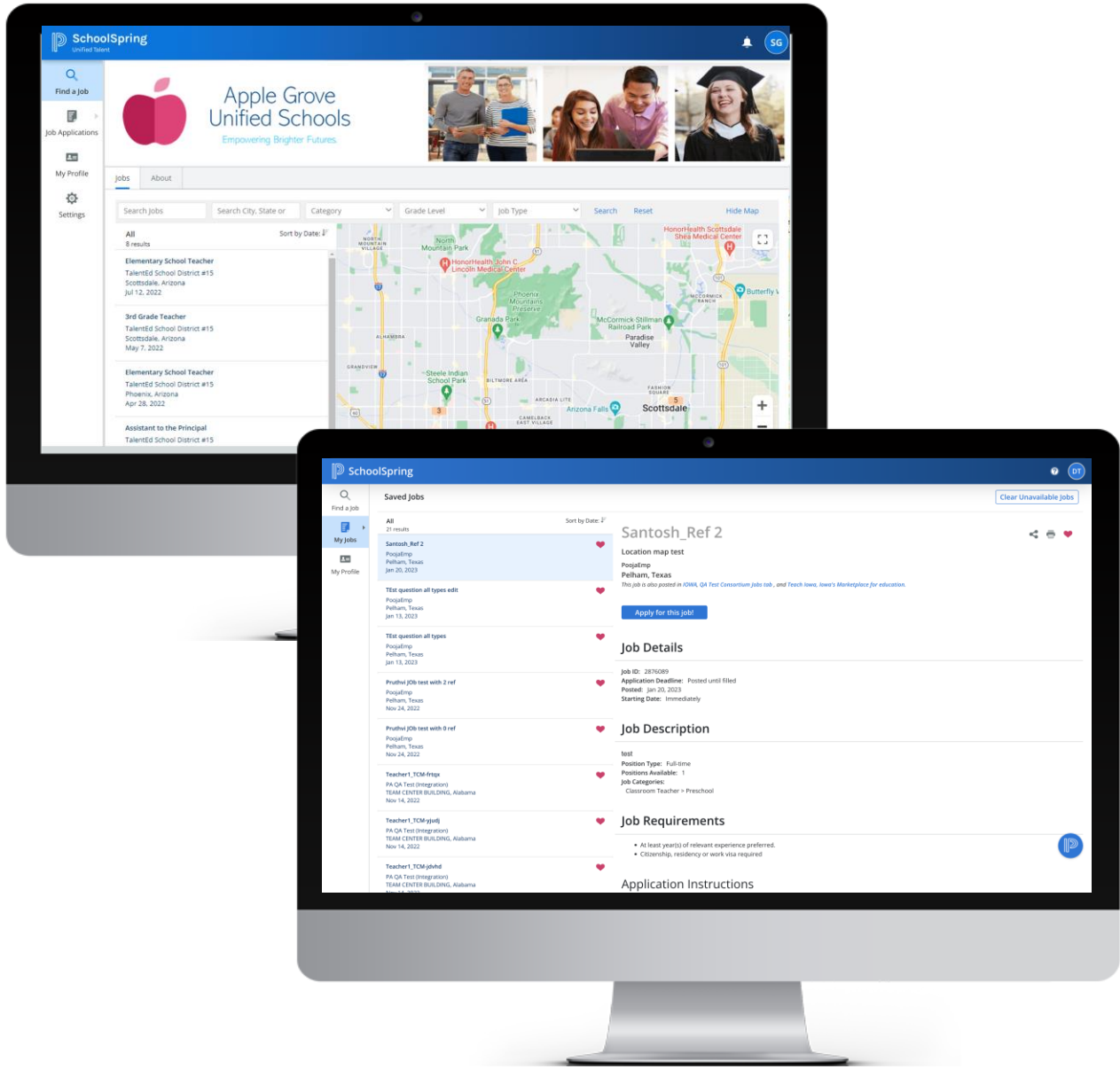
Reduce Teacher Shortage

- By eliminating candidate barriers to increase applicants to your district

SchoolSpring – New User Interface

In Controlled Availability; General Availability scheduled for April 16 (subject to change)

New look and feel for SchoolSpring candidate portal



Highlights

- **Increased usability:** Modern and intuitive interface on both desktop and mobile
- **Dynamic map view:** Easily locate job openings on a map from anywhere
- **Saved Jobs:** Save favorite jobs and apply when ready

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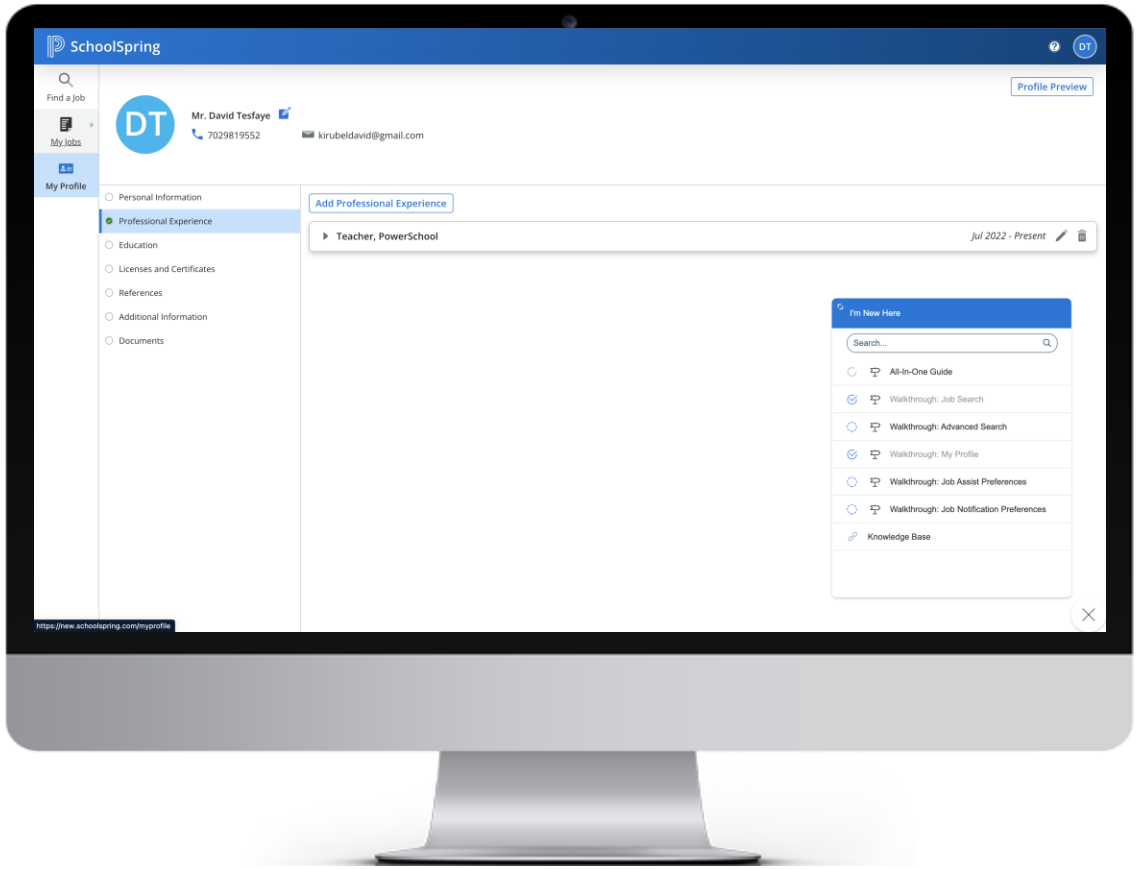
SchoolSpring – New User Interface

In Controlled Availability; General Availability scheduled for April 16 (subject to change)

New Applicant Profile

Highlights

- **Streamlined navigation:** The updated profile has clear sections for easier navigation and completion
- **Simplified information management:** Ensuring the accuracy of the information they enter



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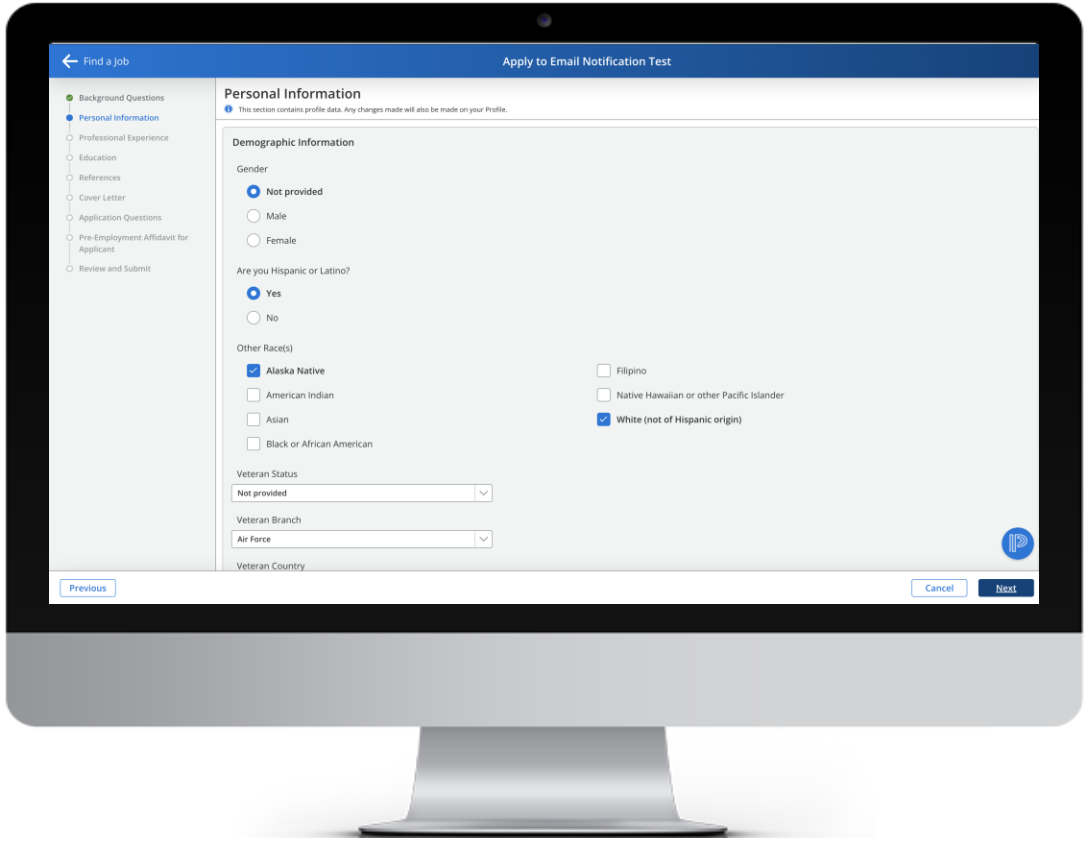
SchoolSpring – New User Interface

In Controlled Availability; General Availability scheduled for April 16 (subject to change)

Easy Apply! Auto fill in profile fields in job applications

Highlights

- **Auto populate job applications:** No need to re-enter the same details over and over
- **Reduce errors and omissions** -> Increase Accuracy
- **Simplified application process:** Increase completion rates



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SchoolSpring – New User Interface

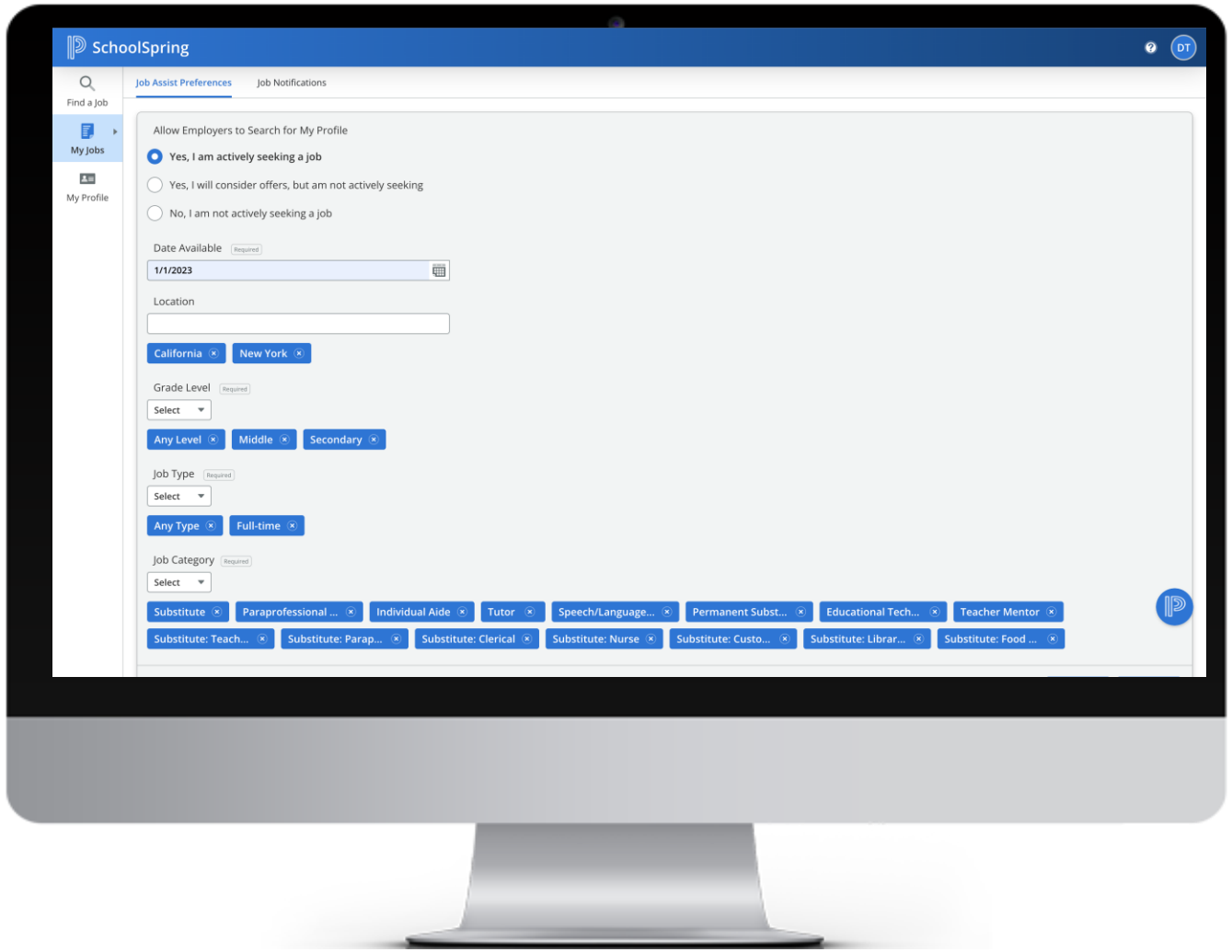
In Controlled Availability; General Availability scheduled for April 16 (subject to change)

Job Assist Preferences - *New Search Agent*

Highlights

- **Customized Job Alerts:** Job seekers receive tailored job alerts to stay updated on relevant openings

- **Proactive Recruitment:** Job Assist preferences page helps you find qualified candidates



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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

Educational Technology
1 Year

Become a PowerSchool Champion!

PowerSchool Champions connect, share and learn with others in solution-specific communities. We share our expertise as teachers, administrators, technology directors, or talent leaders. We engage in interesting activities to accumulate points, collect badges, and earn fantastic rewards. Joining the Champions community provides:

- **Community** · Join an exclusive group of school and district leaders
- **Engagement** · Share your expertise and give product feedback
- **Opportunity** · Earn rewards like swag, cool opportunities, event attendance, and more
- **Growth** · Advance professionally, build your PLN and increase your Ambassador Program eligibility

Visit powerschool.com/champions and SIGN UP or email champions@powerschool.com if you have questions!

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CHAMPIONS

Breakout Room Topics

Applicant Tracking	• Analyzing & Building User & Custom Filters
Applicant Tracking & Employee Records	• Hire, Rehire, & Transfer Best Practices from Applicant Tracking to Records
Employee Records & Onboarding	• Offboarding: Resignations & Retirements
Professional Leaning	• Cleaning up for the End of the Year

PowerSchool PowerUPs

Applicant Tracking

Analyzing & Building User & Custom Filters

Agenda

1. Purpose of User & Custom Filters
2. Overview
3. Analyze Scenarios
4. Build a Filter
5. Q & A

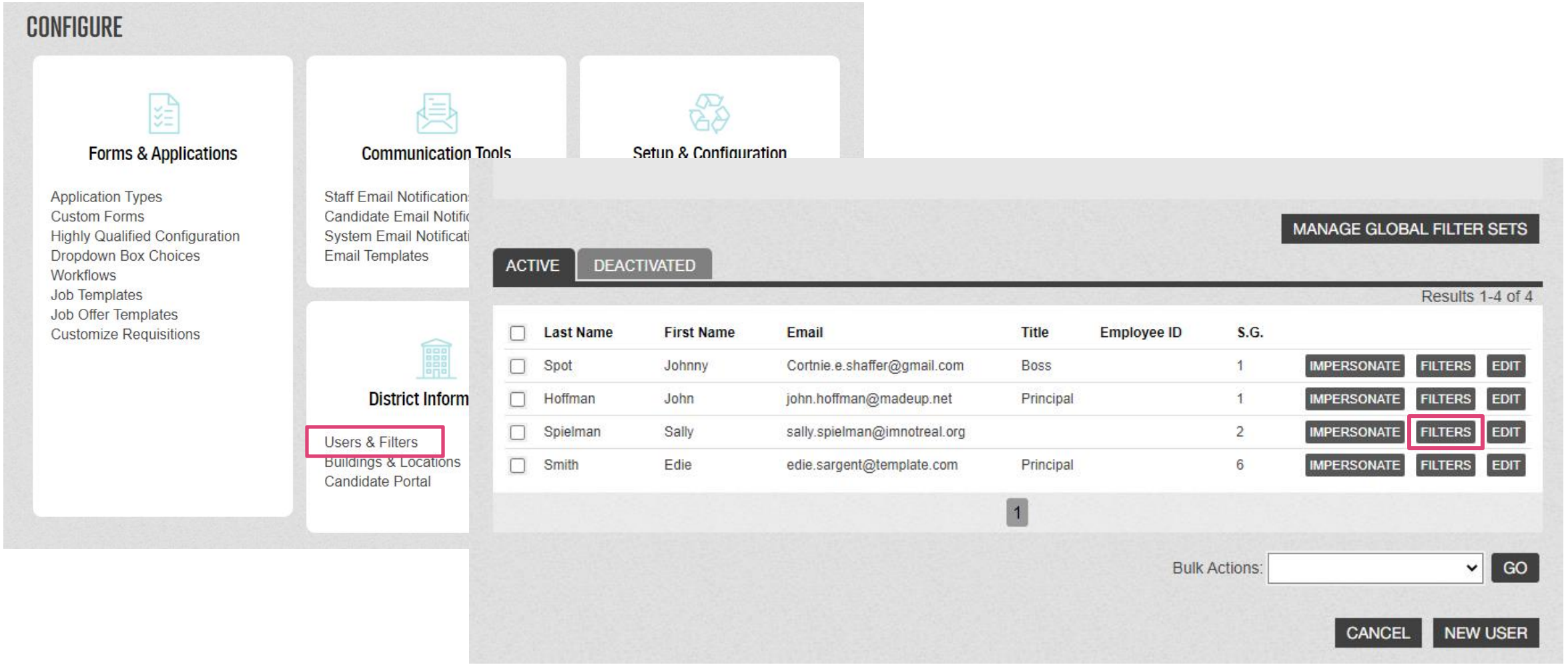
Purpose of User & Custom Filters

User Filters define which applicants specified users can view in the system

Applicants are defined by a multitude of areas

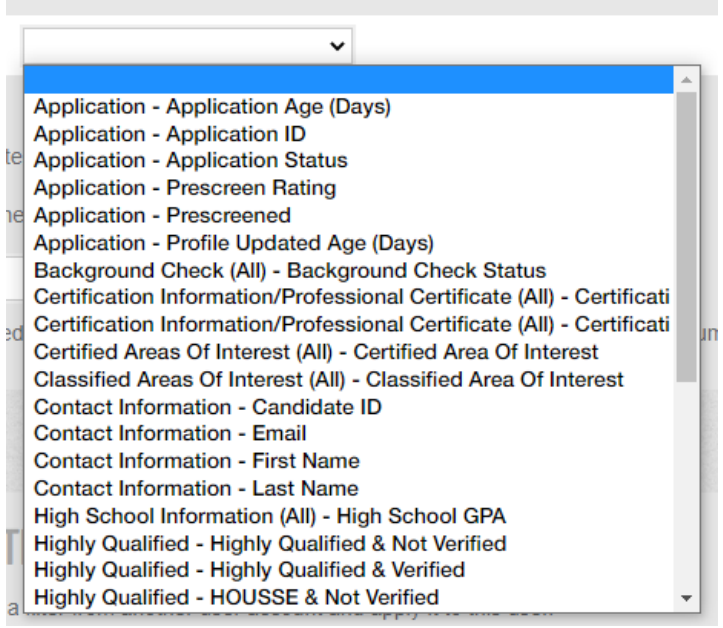
Custom Filters allow you to conjoin multiple filter types

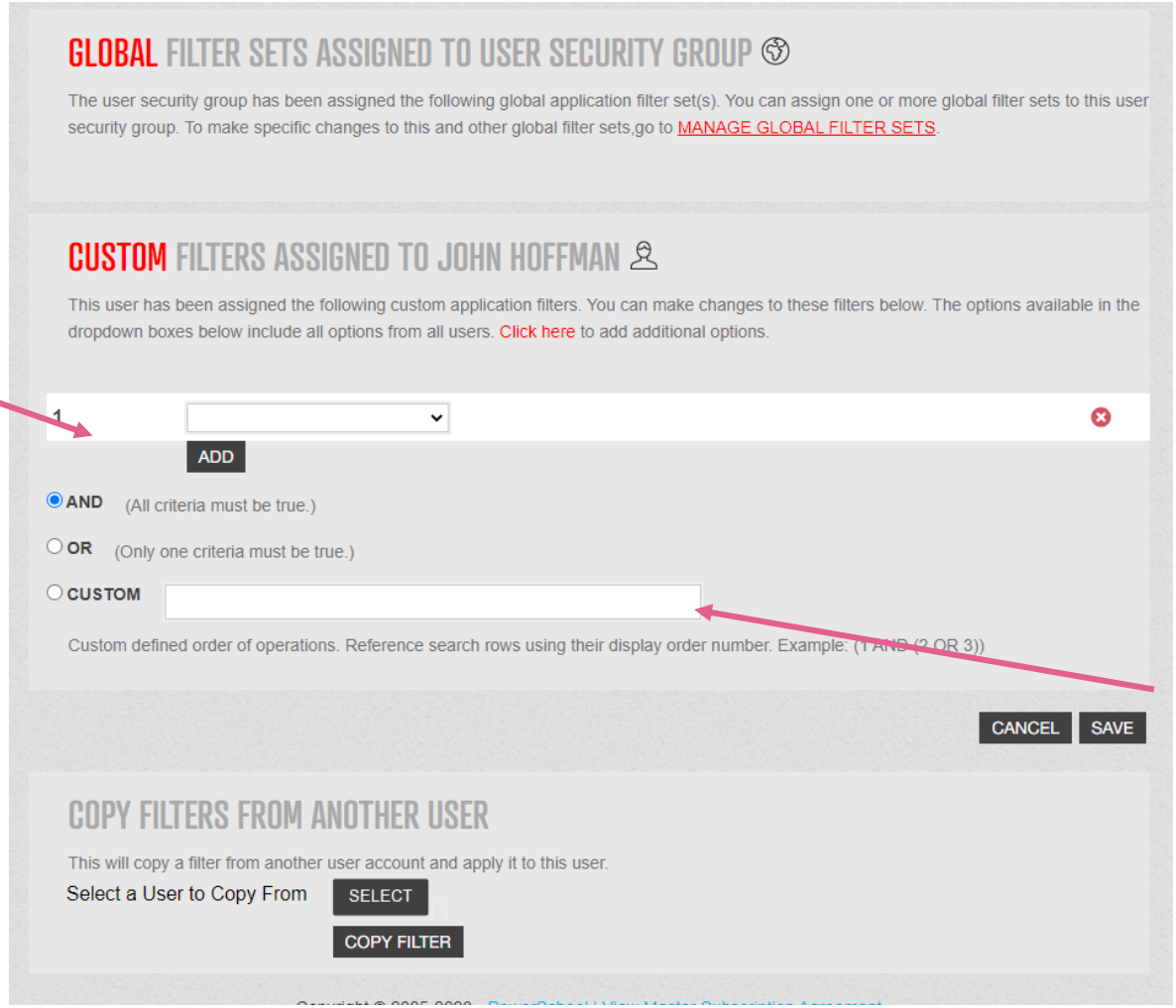
Overview


CONFIGURE
Forms & Applications
Application Types
Custom Forms
Highly Qualified Configuration
Dropdown Box Choices
Workflows
Job Templates
Job Offer Templates
Customize Requisitions
Communication Tools
Staff Email Notification
Candidate Email Notifi
System Email Notificati
Email Templates
Setup & Configuration
District Inform
Users & Filters
Buildings & Locations
Candidate Portal
MANAGE GLOBAL FILTER SETS
ACTIVE
DEACTIVATED
Results 1-4 of 4
Last Name
First Name
Email
Title
Employee ID
S.G.
Spot
Johnny
Cortnie.e.shaffer@gmail.com
Boss
1
Hoffman
John
john.hoffman@madeup.net
Principal
1
Spielman
Sally
sally.spielman@imnotreal.org
2
Smith
Edie
edie.sargent@template.com
Principal
6
IMPERSONATE
FILTERS
EDIT
1
Bulk Actions:
GO
CANCEL
NEW USER

Overview

You can select the criteria that will filter in or out applicants for the staff member to see.





Customizing the filter allows you to create multiple combination sets.

Analyze Scenarios

SCENARIO A

Scenario A– Apple Grove ISD has a principal who needs to see
app
Eler
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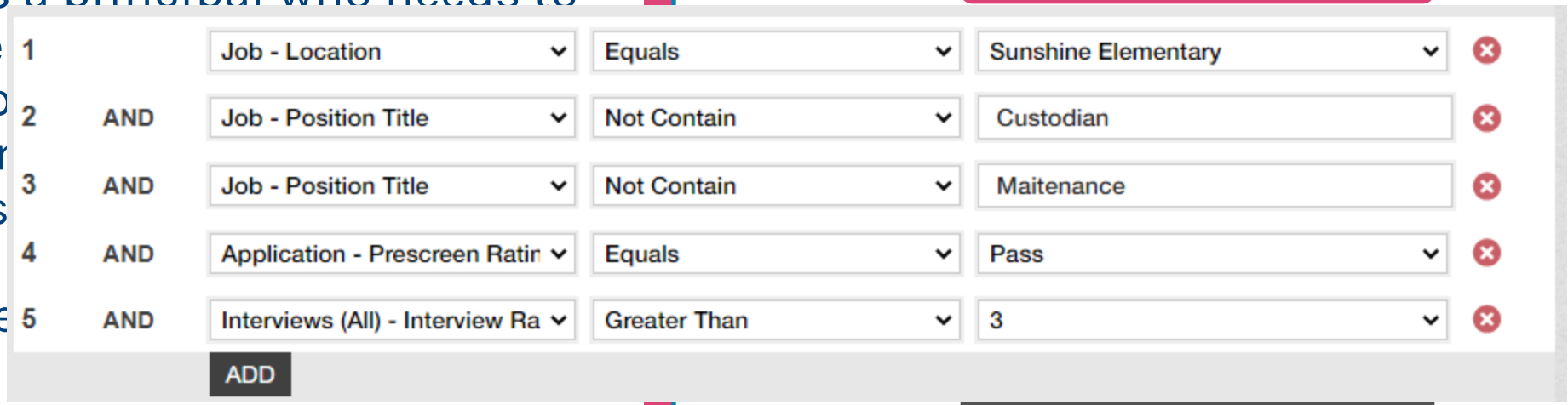
for
want to filter out anyone with an interview rating 3 or below.

Application Prescreened Rating Equals Pass

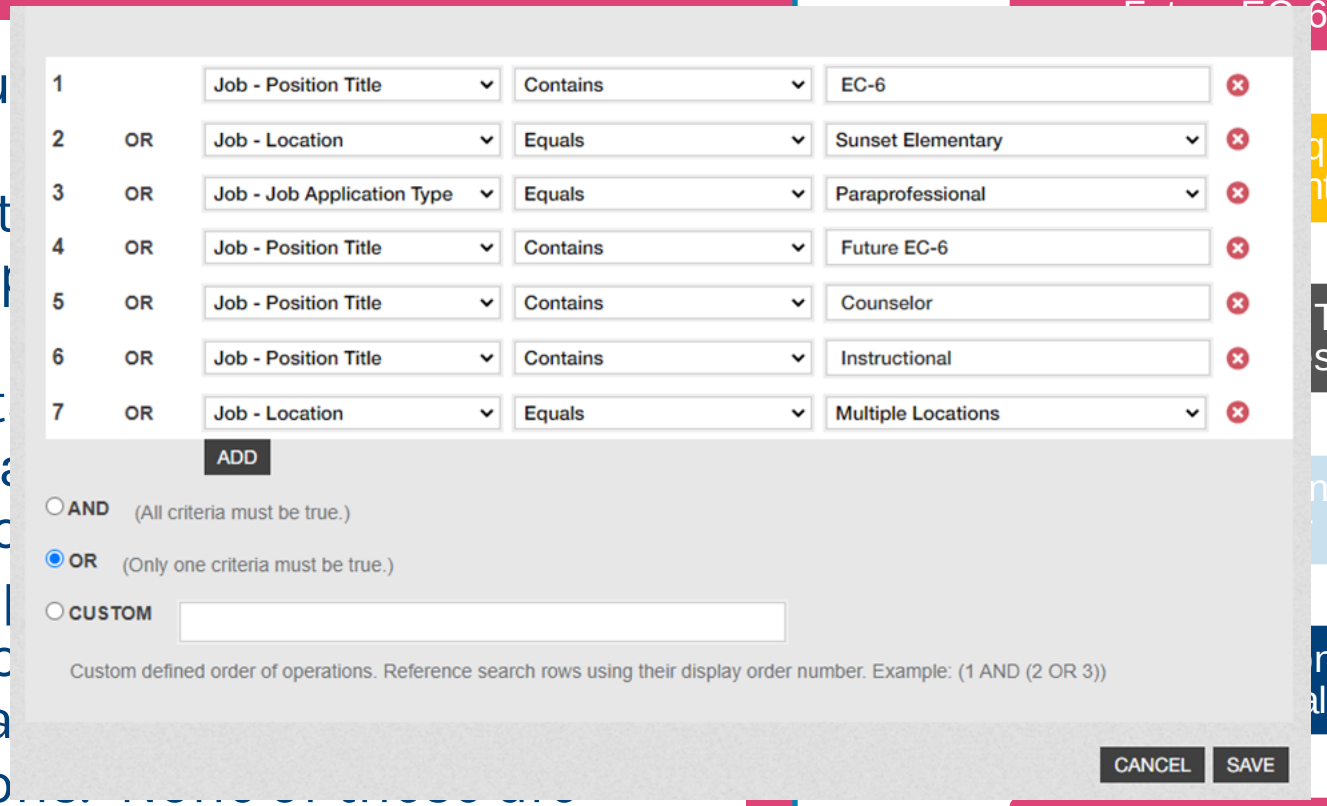
Job Location Equals Sunshine Elementary



Interview Rating Greater Than 3

SCENARIO B

Scenario B – Su
needs to see all
district. The dist
to post general
applicants who
Sunset Element
anything that ha
position title: Co
Future EC-6. All
viewed for the jo
Paraprofessiona
Multiple Locatio
dependent on the other.



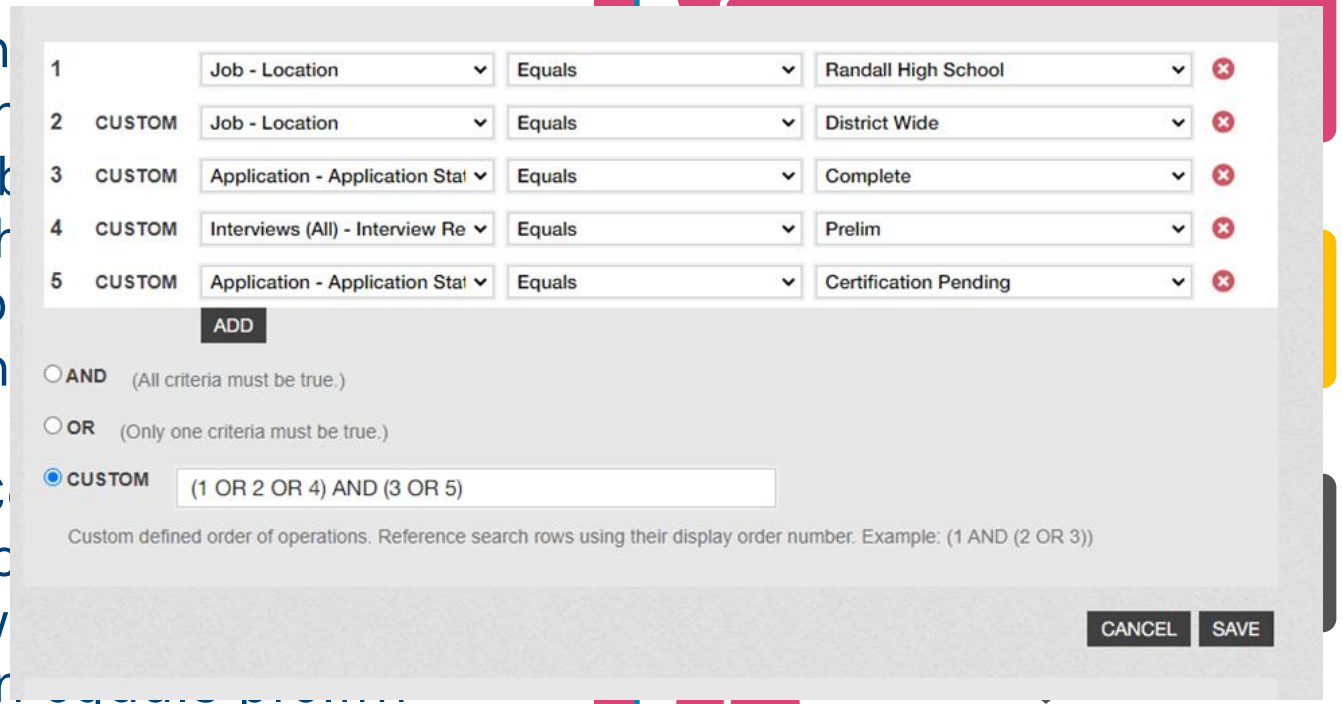
Position Title Contains EC-6

Position Title Contains

Job Location Equals Multiple Locations

SCENARIO C

Scenario C– Prin
Randall High Sch
able to see all job
at Randall and th
Wide. Within tho
needs to see can
application that
by HR or has a 'C
status. In additic
needs to see any
recommendation
regardless of job location.



1 Job Location Equals Randall High School — 1&3, 1&4

2 — 2&3, 2&4

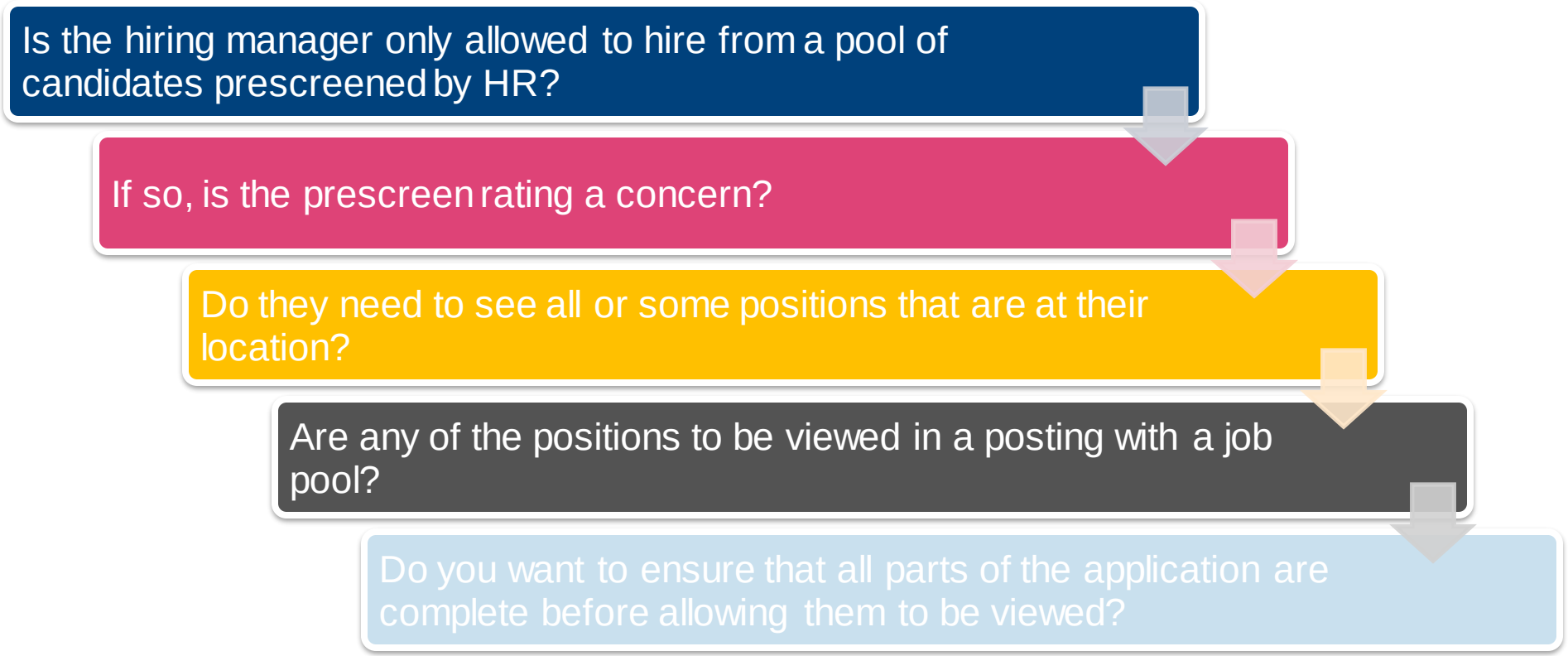
5 Interview Results Equal Prelim — 5&3, 5&4

Build a Filter

Filters aren't just useful for campus administrators. Other positions to consider applying filters to:

- Maintenance, Custodial, Food Service, or Transportation Directors
- Hiring Managers Certified Vs. Classified
- SPED Directors

Build a Filter - Guiding Questions



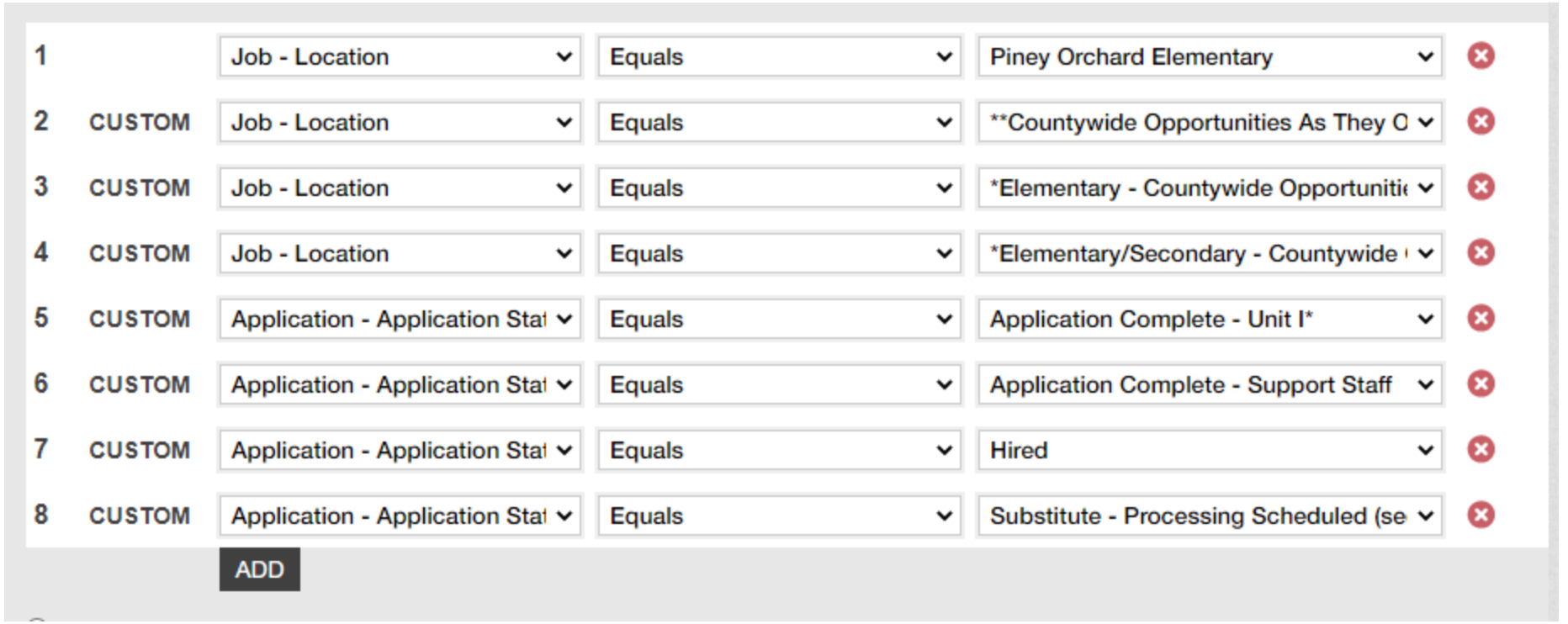
What are some questions that you might need to consider in your district?

Build a Filter

The Assistant Principal at Piney Orchard Elementary is allowed to see posting for his campus. He also needs to be able to view their job pools. The district uses identifying locations in their job pools such as Countywide, Elementary – Countywide, and Elementary/Secondary – Countywide.

The district also vets every candidate and uses application status to release them to the campus administrators. The following application statuses are the ones that he should be able to view: Application Complete – Unit 1, Application Complete – Support Staff, Substitute – Processing Scheduled, Hired

How would you build this filter?


1
Job - Location
Equals
Piney Orchard Elementary
2 CUSTOM
Job - Location
Equals
**Countywide Opportunities As They C
3 CUSTOM
Job - Location
Equals
*Elementary - Countywide Opportuniti
4 CUSTOM
Job - Location
Equals
*Elementary/Secondary - Countywide
5 CUSTOM
Application - Application Stat
Equals
Application Complete - Unit I*
6 CUSTOM
Application - Application Stat
Equals
Application Complete - Support Staff
7 CUSTOM
Application - Application Stat
Equals
Hired
8 CUSTOM
Application - Application Stat
Equals
Substitute - Processing Scheduled (se
ADD

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PowerSchool PowerUPs

Applicant Tracking & Employee Records

Hire, Rehire, & Transfer Best Practices from Applicant Tracking to Employee Records

Agenda

1. New Product Release!
2. Begin Hire Process
3. Types of Hires
4. Demo
5. Q&A

Overview

ATS/Records – Begin Hire Integration

Available Now with our March 2023 Release!

- Only applicable for ATS customers w/Records

- If creating a Records account, a new “Search Records” button will appear that looks for possible matches in Records. Allows the ATS customer to “replace” the information with that found in Records.

- If replaced, the ATS new hire will be linked to the selected Records account. The new hire’s documents will appear along with the existing new hire documents in Records.

As of the TED 23.3 Release

Begin Hire: Search Records for existing accounts

- Reduces chance of duplicate accounts

New Hire Folder

- New Hire documents for all positions hired for over time

Custom Reports

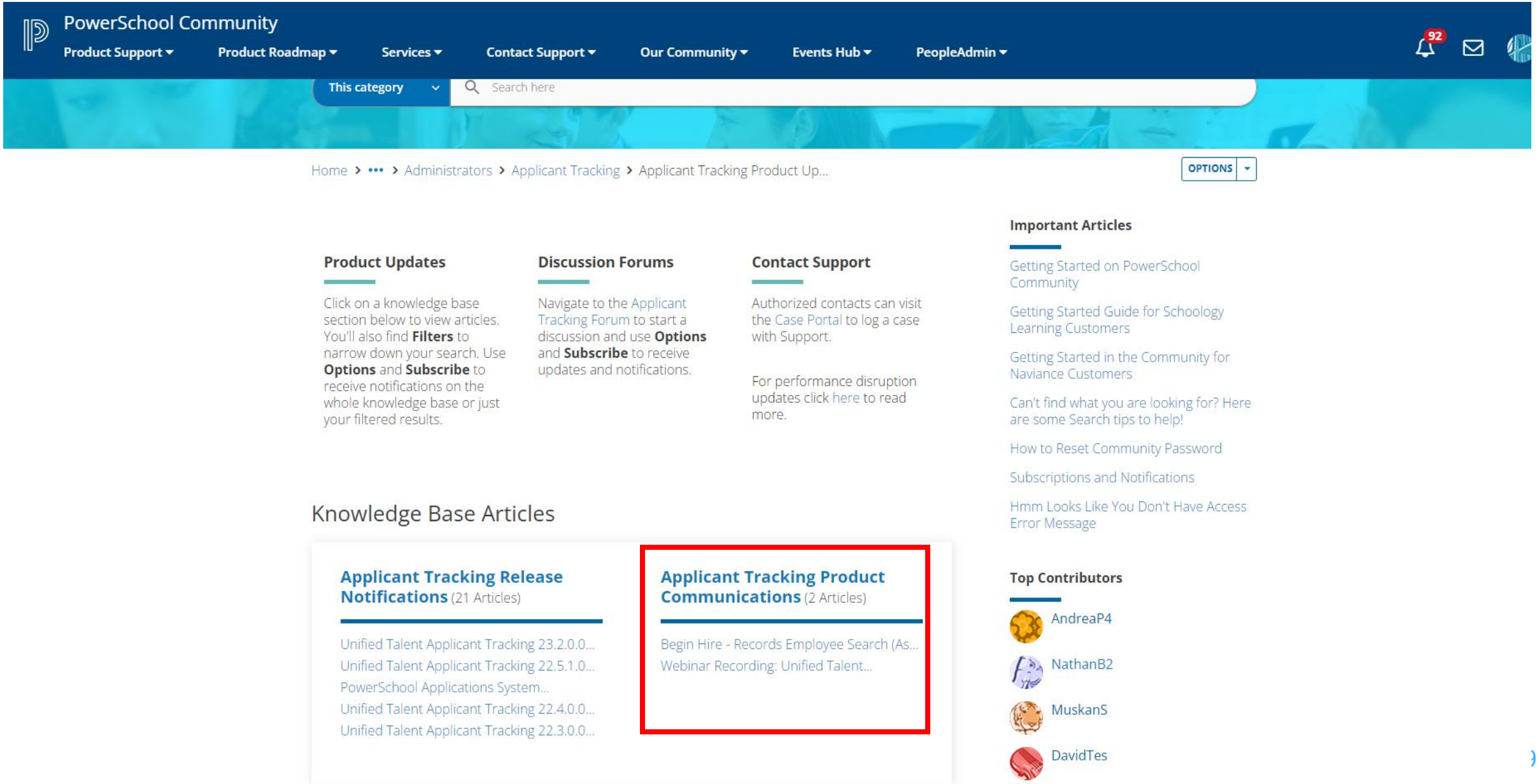
- Can include most recent Candidate ID in staff information

Search Criteria:

All the listed search occur when the “Search Records” button is selected:

- Both active and inactive employees are searched.
- If first name, last name, AND DOB are entered, select all employees with matching information
- If email is entered, select all employees with matching email.
- If Employee ID is entered, select all employees with a matching Employee ID.
- If SSN is entered, select all employees with a matching SSN.

Additional Resources: Product Article on this Feature



Demo

… the good stuff

Benefits of Begin Hire from ATS to Records

Create a new account in Records for the new hire

- If no existing match is found

Automatically reactivate existing accounts, if deactivated

- If an existing match is found

Assign checklists during the process

- Can assign more than one at a time if needed

Add Application, Begin Hire Page, Job Offer, Cover Letter, Resume, and Transcripts to "New Hire Documents" folder

- Begin hire page can be customized to include additional information as needed

Best Practices for Begin Hire

Add information and select options as necessary on the begin hire screen

Select "Create User Account for this candidate in Records"

NEW Search Records to check for existing account(s) and select an appropriate match if found

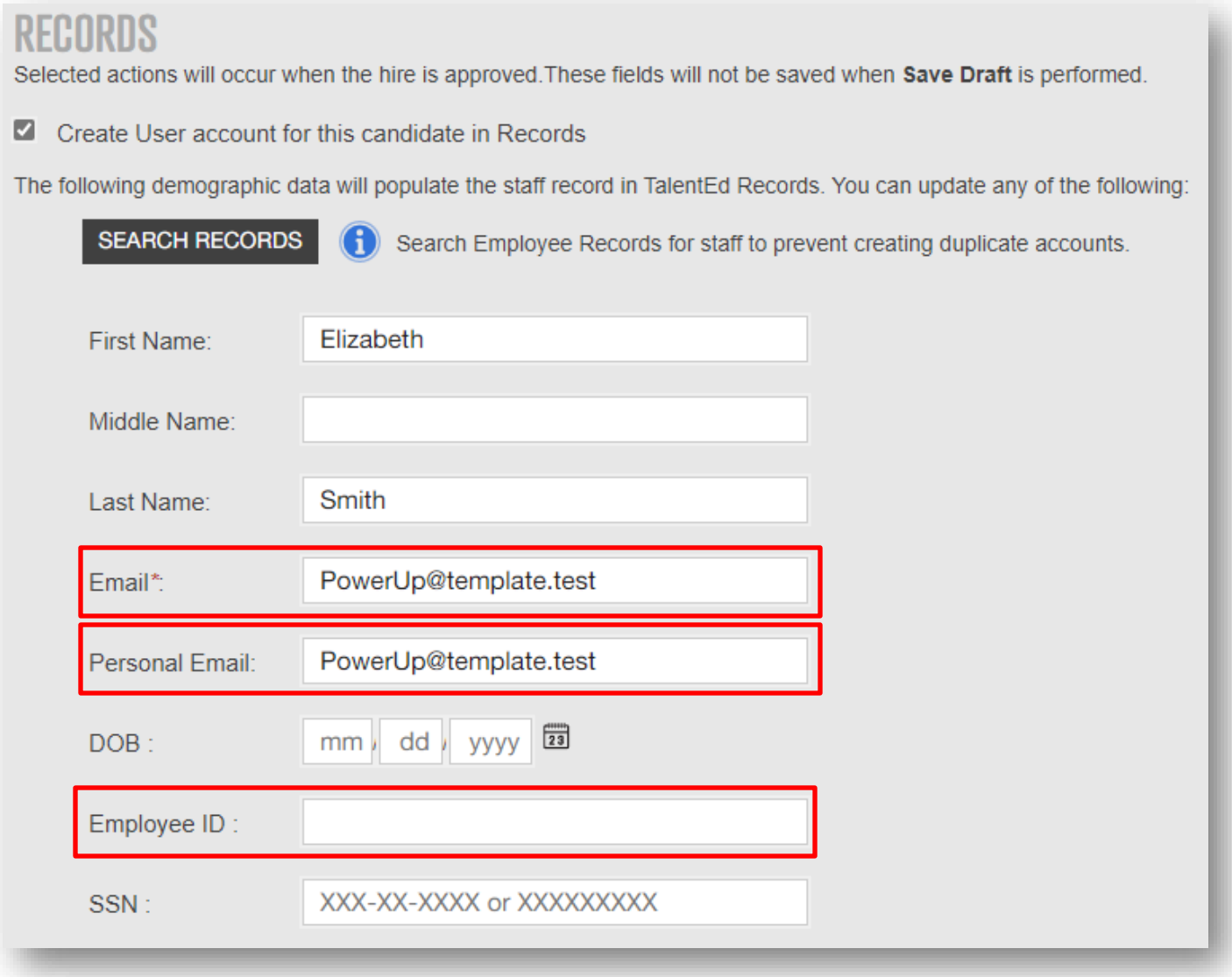
Select Workflow

Submit

All options, including the "Create User Account", do not take place until after the Workflow is fully approved

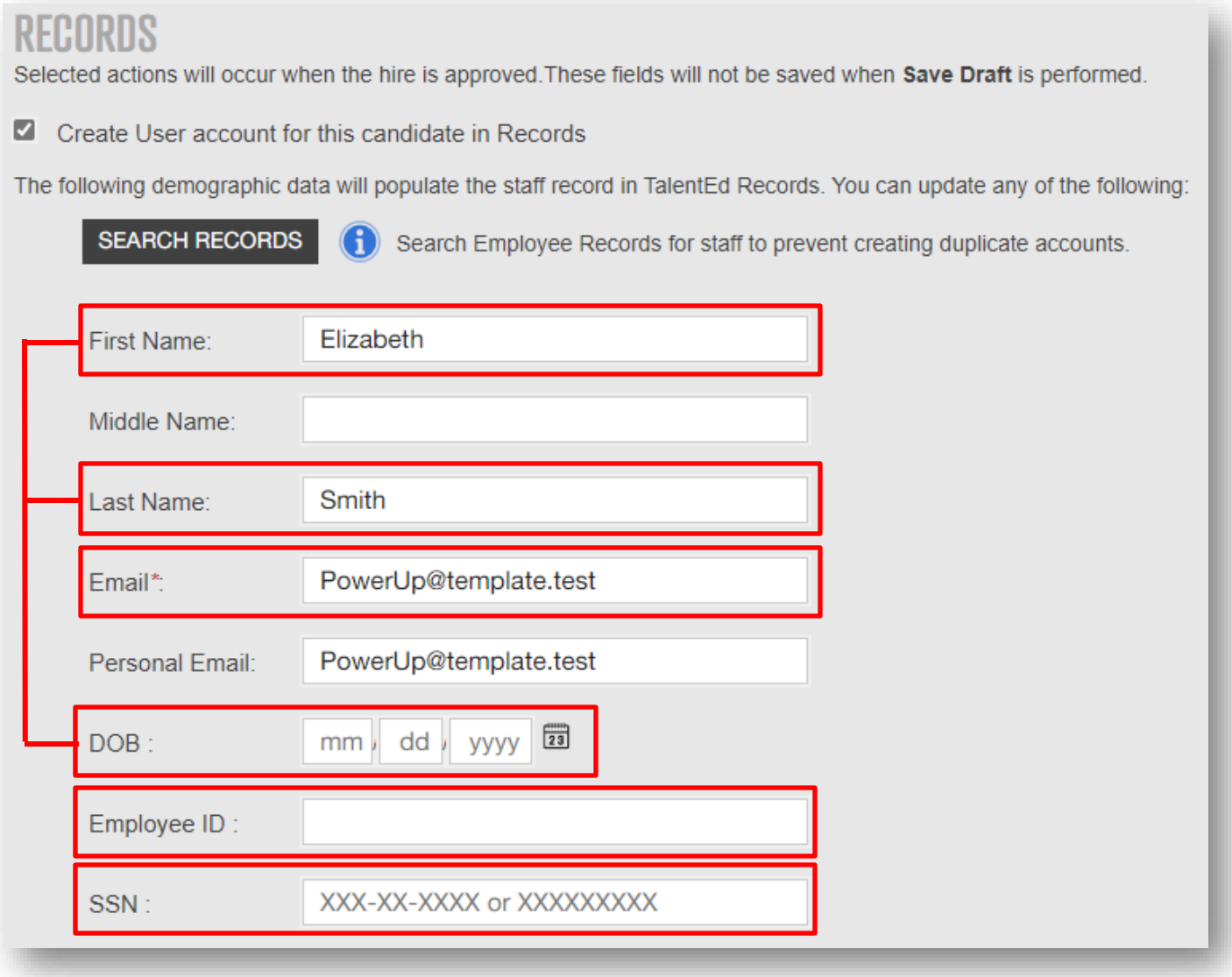
Automatic Match

1. Employee ID Number
2. Email Address
3. Personal Email Address

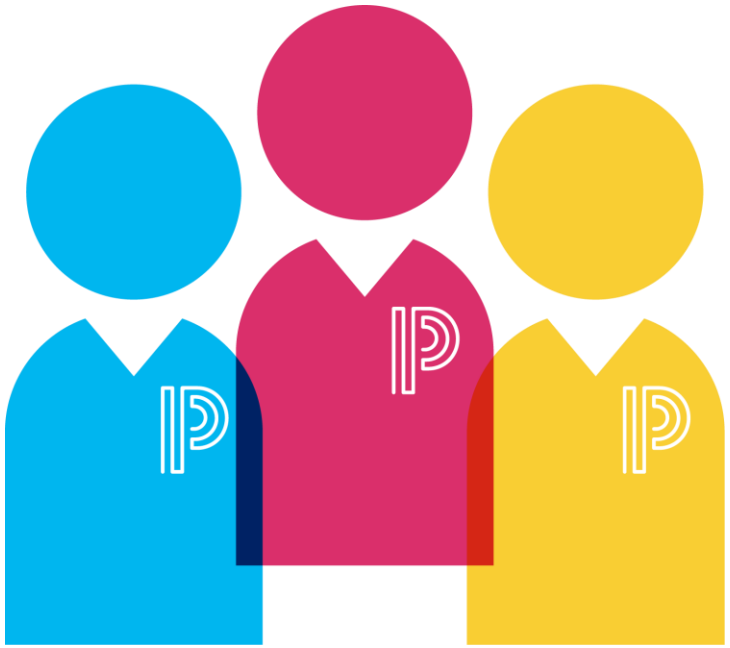


New Search Fields

- First Name, Last Name, AND Date of Birth
- Email Address
- Employee ID
- Social Security Number



Types of Hires



Brand New Hire

- No Account exists in Records

Rehire

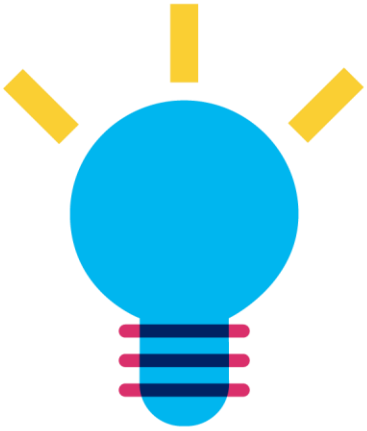
- Deactivated Account

Current Employee

- Active Account

Examples!

- Brand New Hire
  - No Account – Robin Franklin
- Rehire
  - Standard - Preston Burns
  - Name Change – Lillian Harris
  - No initial link – Elizabeth Smith
- Current Employee
  - Staying in position – Ashton Gibson
  - Changing Position – Maverick Garza



Final Thoughts

- Always search for existing accounts
- Consider the information being updated
  - Are they switching positions?
  - Are they a rehire?
    - Do they have a name change?
    - Do they have an inactive work email address as the primary email that needs to be sent to the personal email address instead?

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PowerSchool PowerUPs

Employee Records & Onboarding

Off Boarding and Resignations

Agenda

1. Understand your processes and Be prepared
2. Who is responsible for which tasks
3. Best practice ideas
4. Q & A

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Understand Your Processes and Be Prepared

- Understand Your Process
  - How are you currently offboarding?
  - What is working?
  - What is mandated/required?
  - Which departments/people are involved?
- Be Prepared
  - Have forms ready in Records
  - Have checklists created
  - Communicate process and expectations

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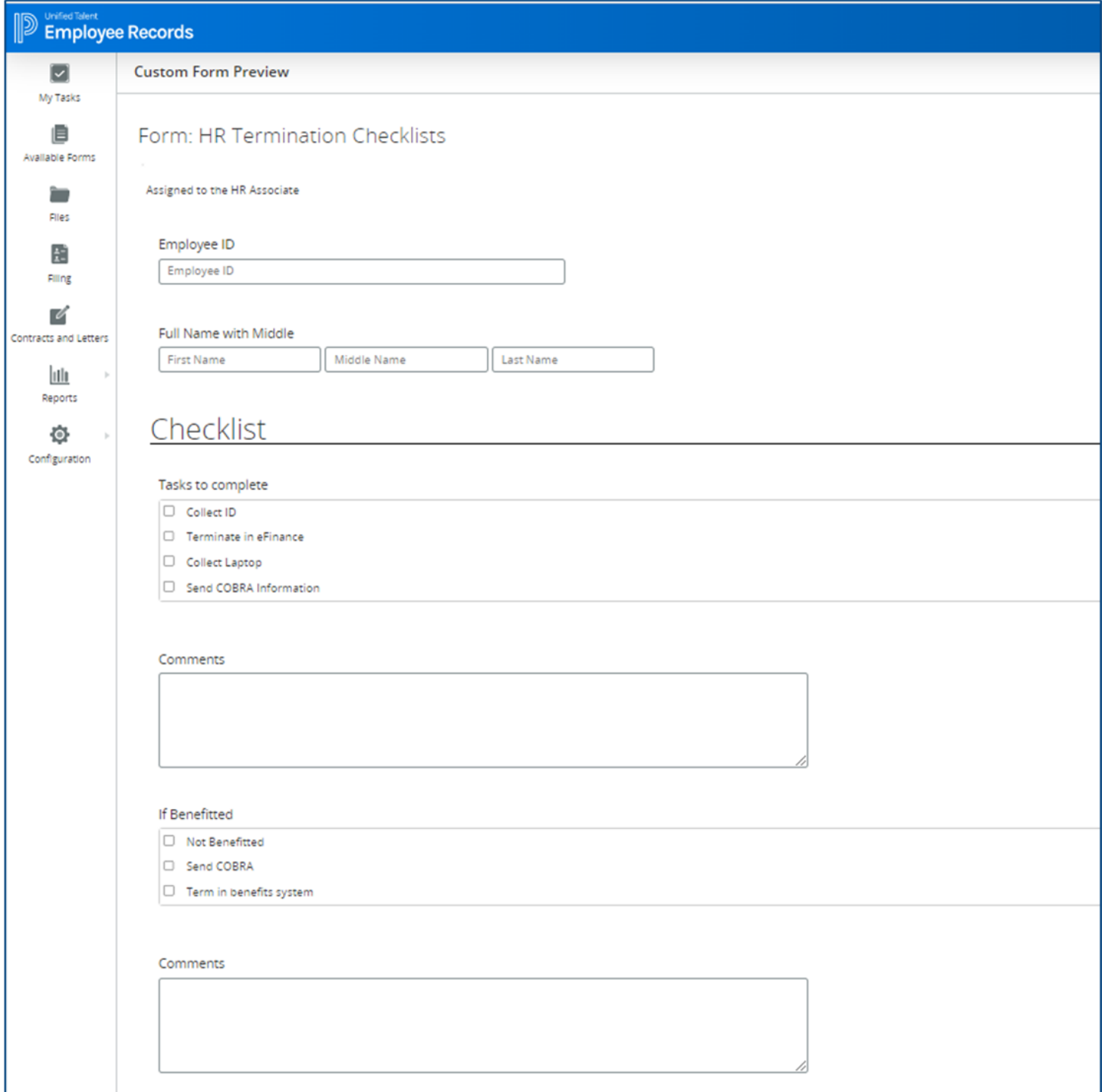
Who is Responsible for which Tasks?

- How does the process start? Can the employee and/or admin or HR initiate?
- Does anything need to be in writing?
- How are tasks assigned to the proper individuals?
- Are checklists necessary?



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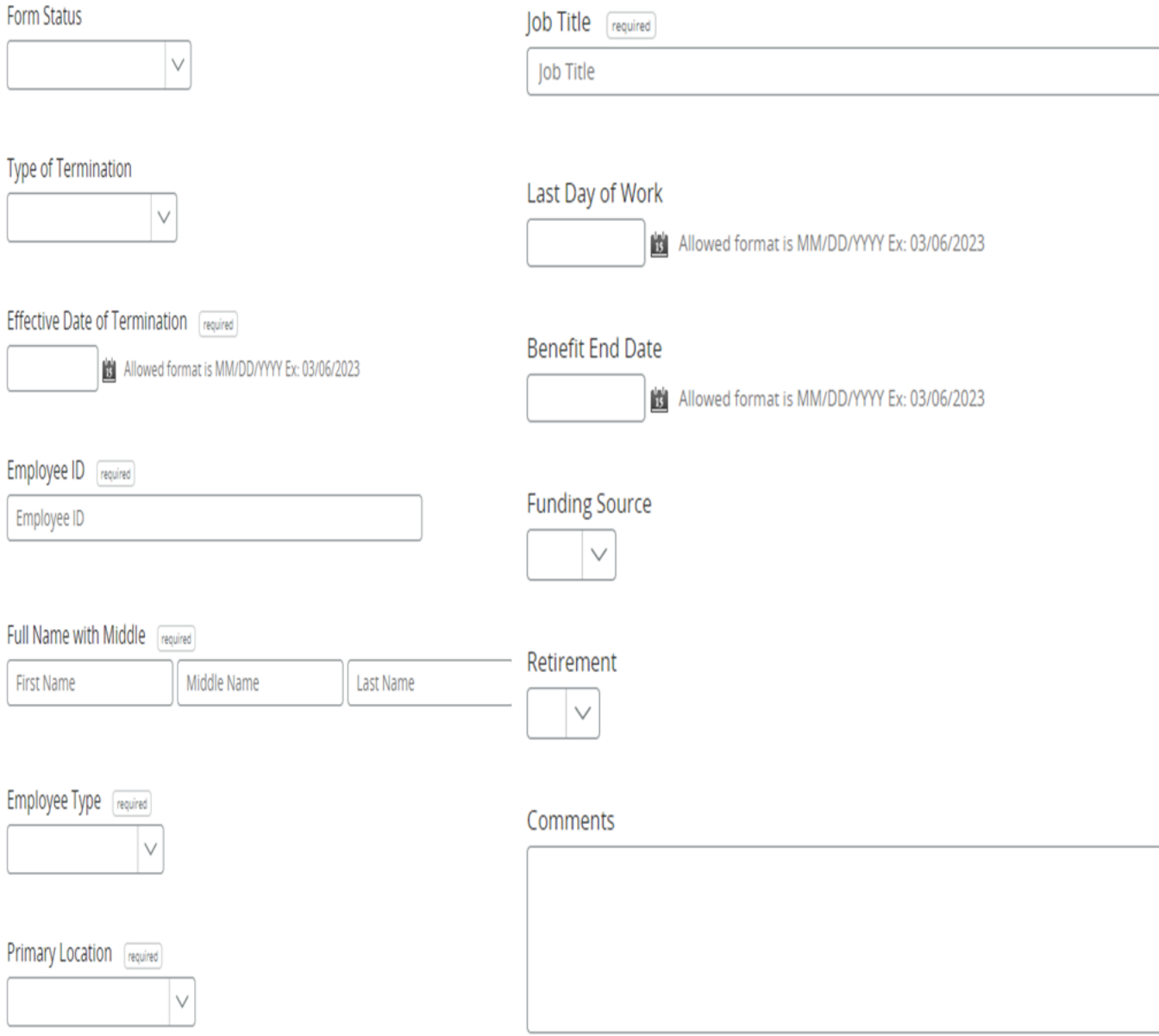
Best Practice Ideas

- Do tasks first and deactivate last!
- Assign in advance when possible
- Best practice asks
- Attachment options
- Keep it as simple as possible



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Professional Learning

Cleaning up for the End of the Year

PowerSchool PowerUPs

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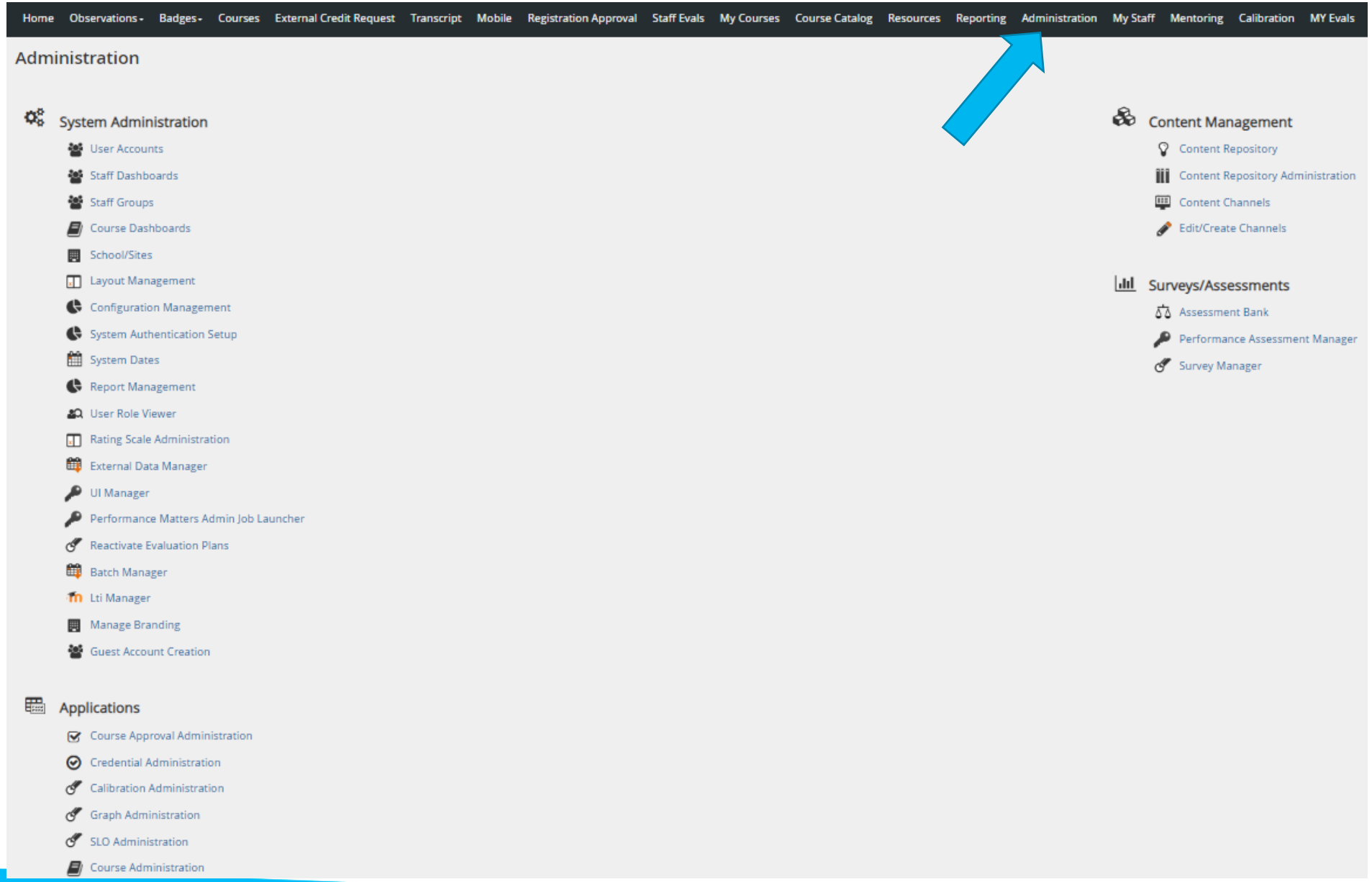
Agenda

1. Updating Users
2. Archiving Courses
3. Updating Channels
4. Q & A



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Updating User Roles

- Updating User Roles
- Updating Offices
- Manage Administrators
- Making a User Inactive

Updating User Roles

- Updating User Roles
- Updating Offices
- Manage Administrators
- Making a User Inactive

Updating User Roles

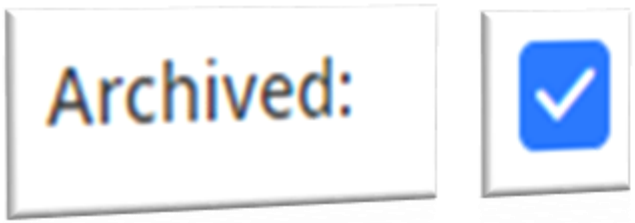
- Updating User Roles
- Updating Offices
- Manage Administrators
- Making a User Inactive

Updating User Roles

- Updating User Roles
- Updating Offices
- Manage Administrators
- Making Users Inactive

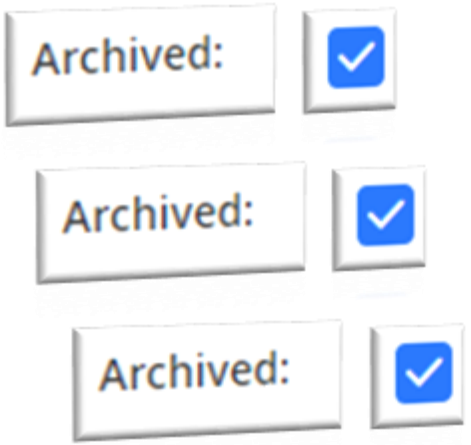
Archiving Courses

- Archiving a Single Course
- Bulk Archiving Courses

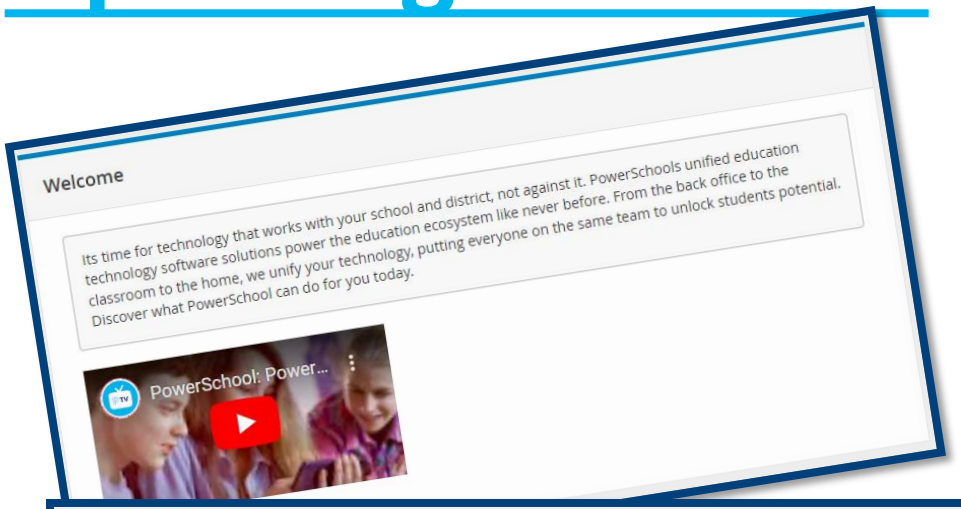


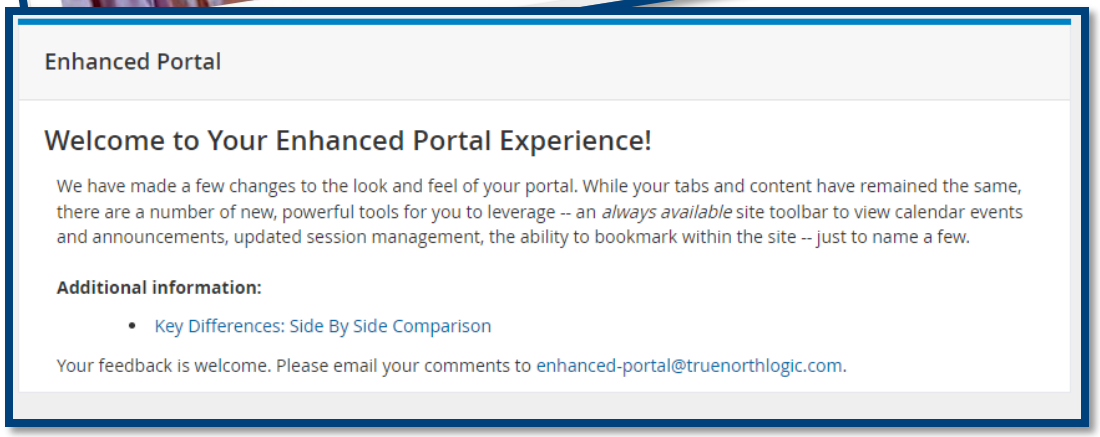
Archiving Courses

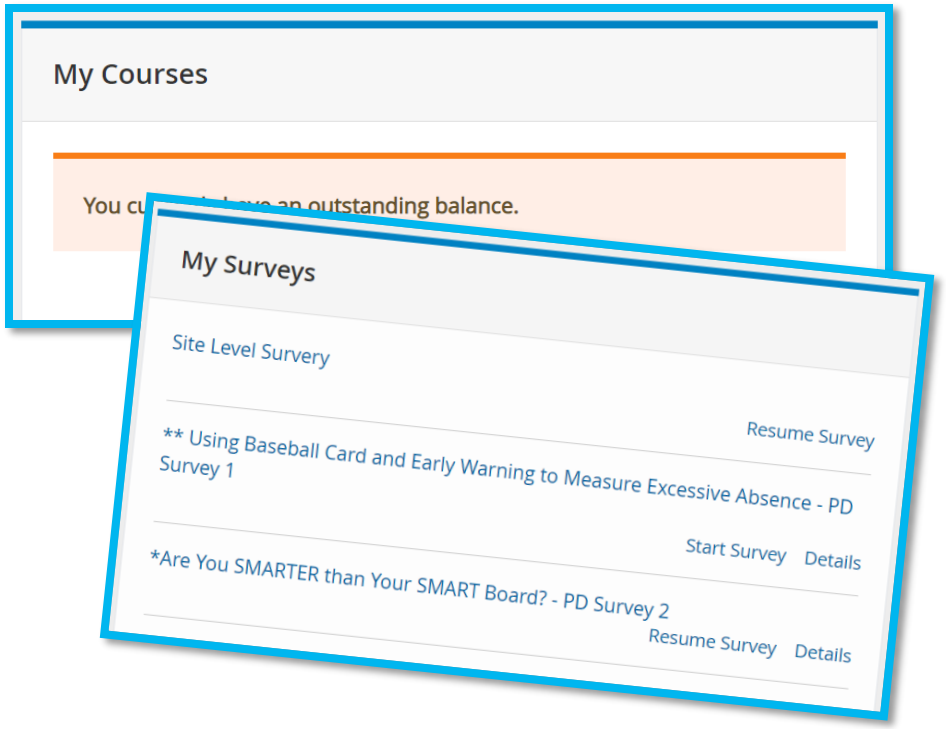
- Archiving a Single Course
- Bulk Archiving Courses



Updating Channels







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