

Welcome to the Unified Talent PowerSchool PowerUp!



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





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?



Product Update Announcements

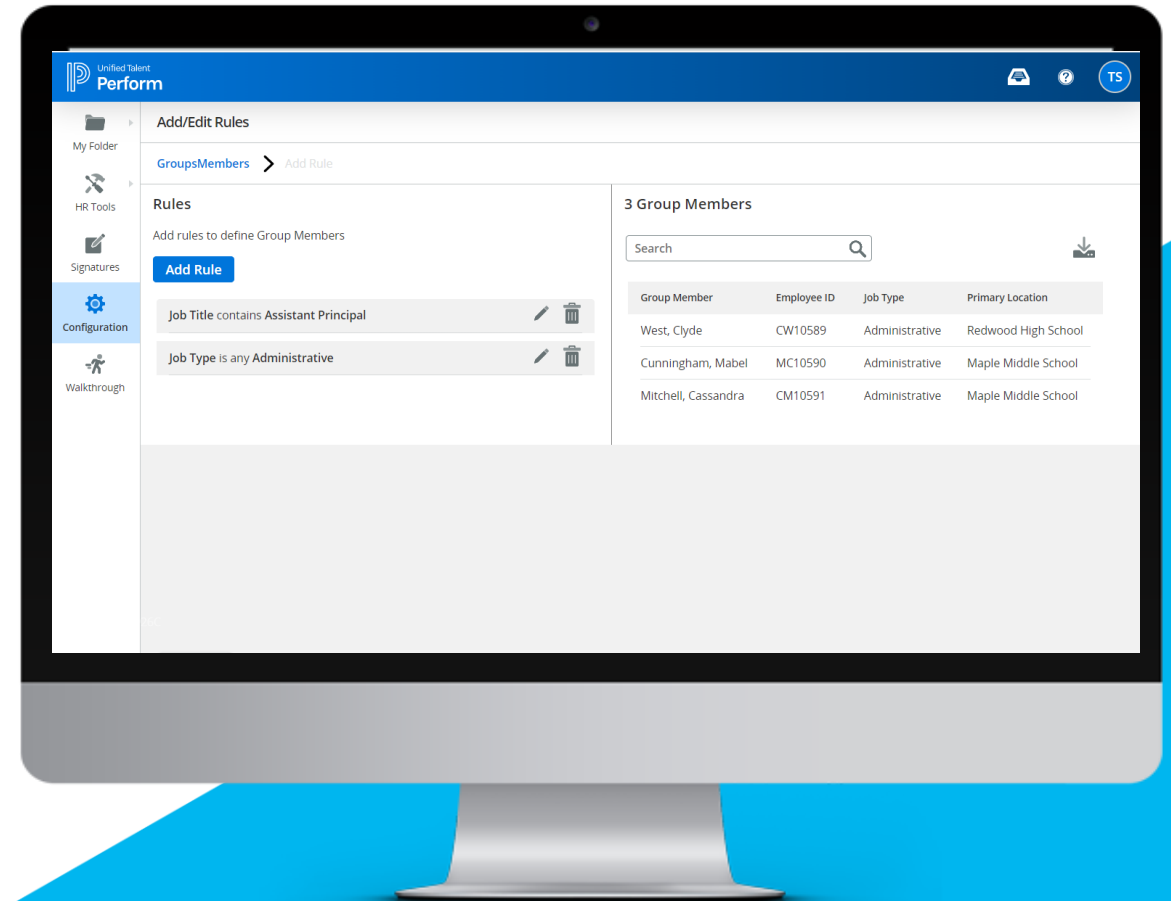


Dynamically Create Groups in Perform

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.



New SchoolSpring

Reduce Teacher Shortage

- By eliminating candidate barriers to increase applicants to your district



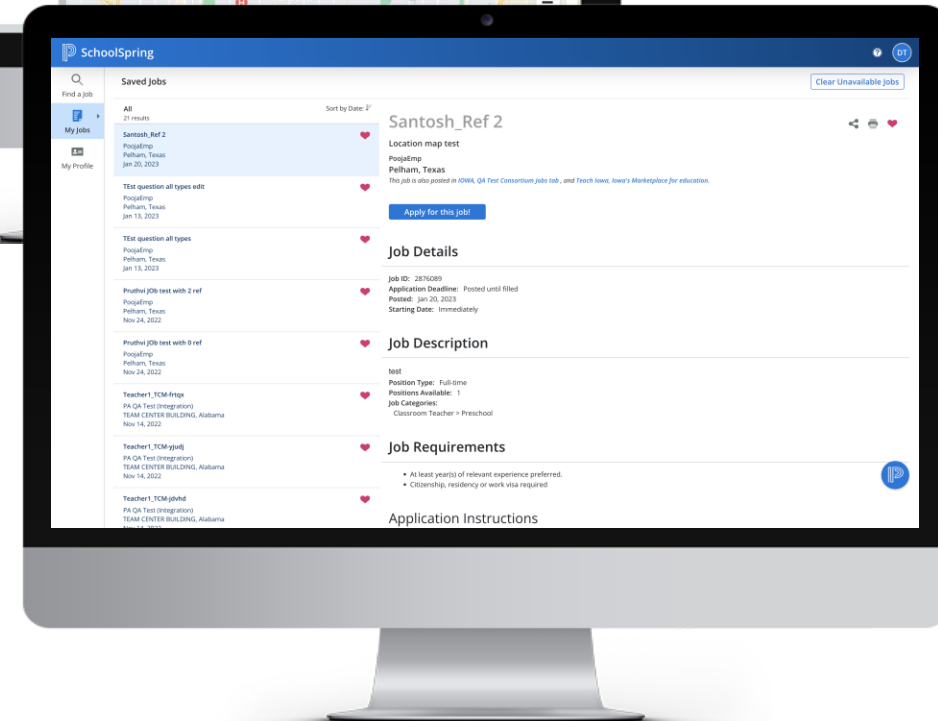
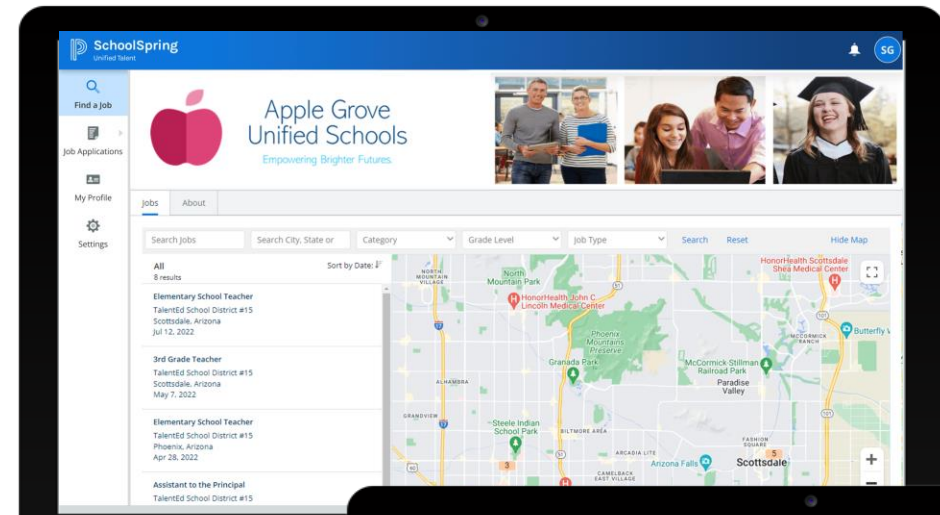
SchoolSpring – New User Interface

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



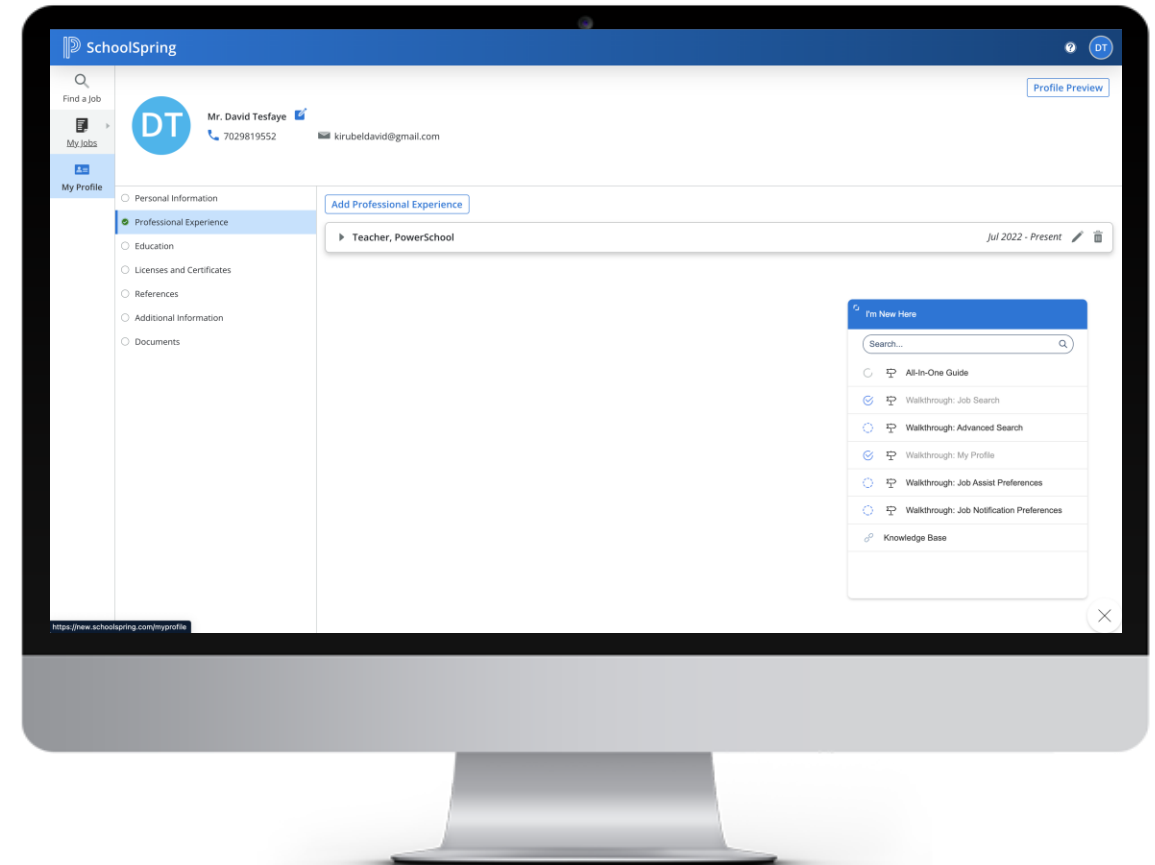
SchoolSpring – New User Interface

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



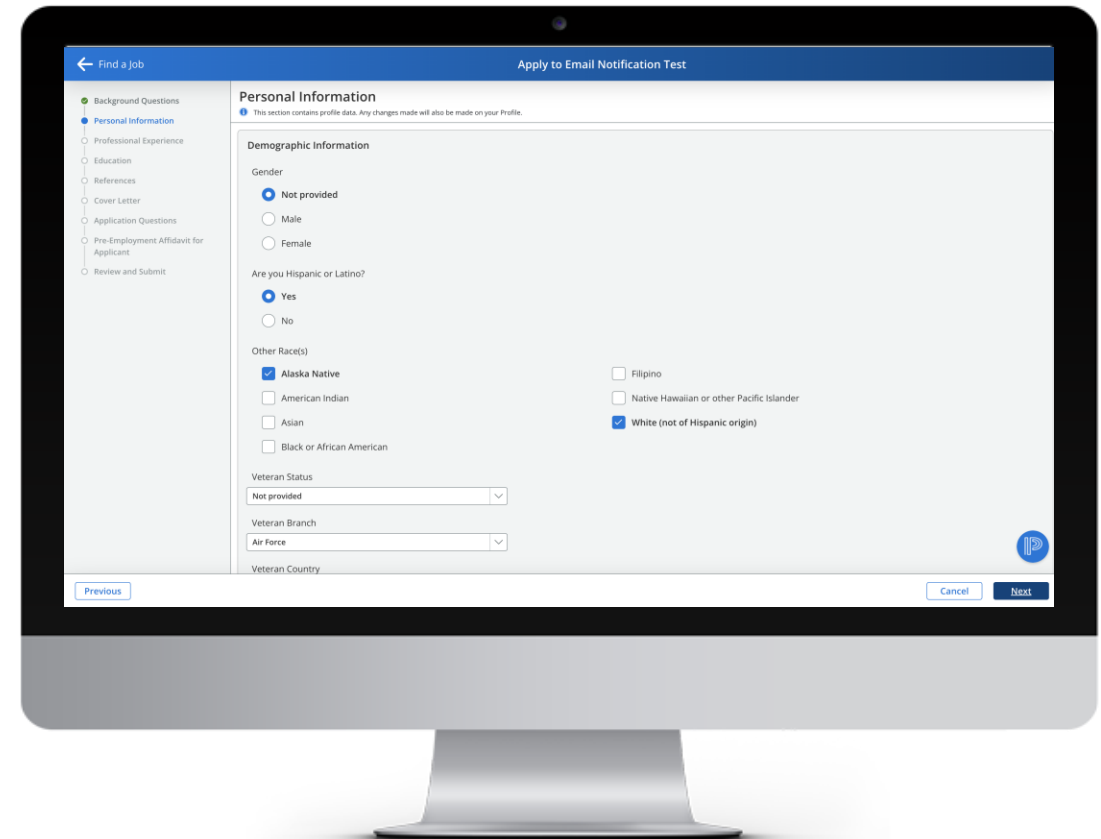
SchoolSpring – New User Interface

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



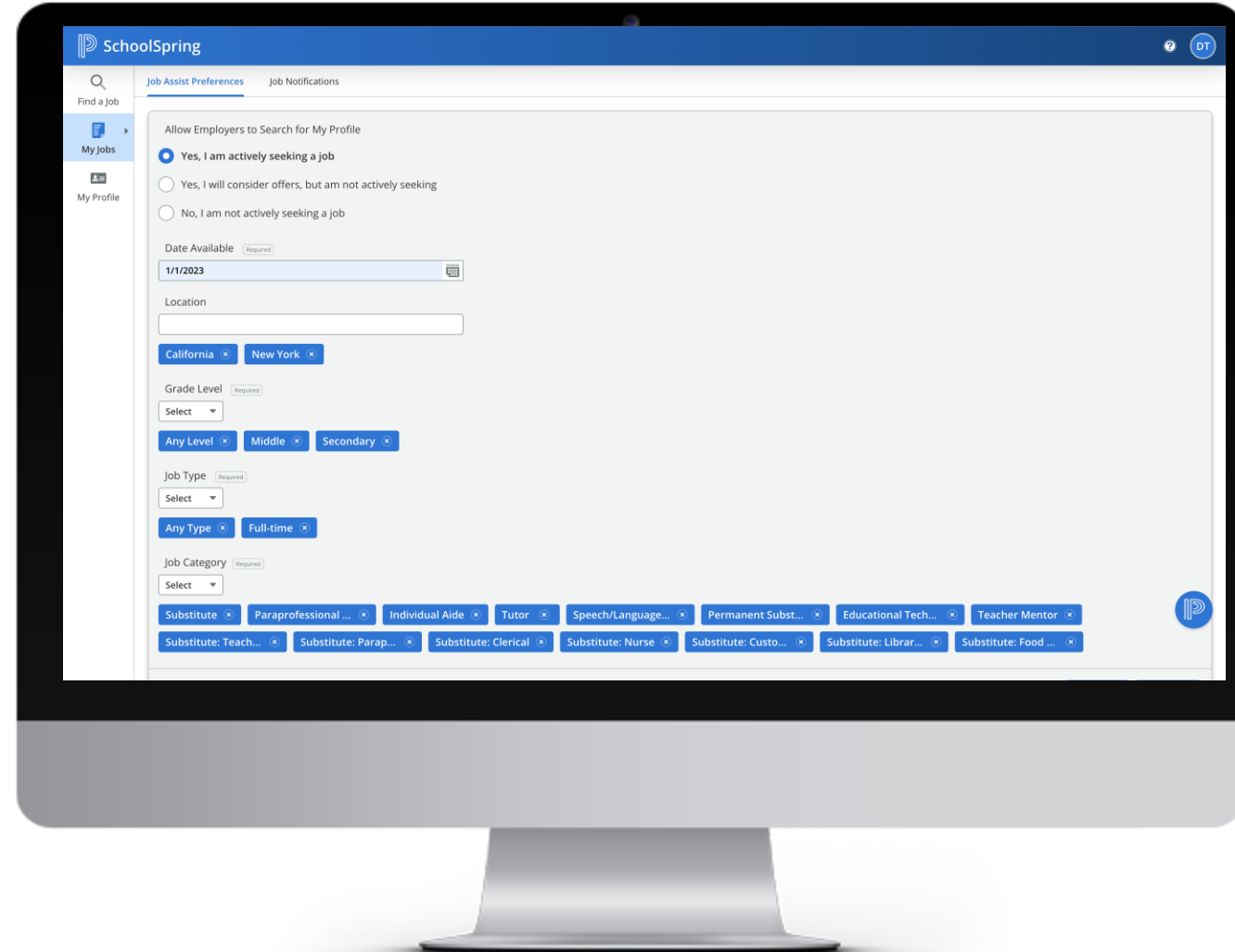
SchoolSpring – New User Interface

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



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 Learning

- Cleaning up for the End of the Year

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 Notific
- System Email Notificati
- Email Templates



Setup & Configuration



District Inform

- Users & Filters**
- Buildings & Locations
- Candidate Portal

ACTIVE DEACTIVATED

MANAGE GLOBAL FILTER SETS

Results 1-4 of 4

<input type="checkbox"/>	Last Name	First Name	Email	Title	Employee ID	S.G.			
<input type="checkbox"/>	Spot	Johnny	Cortnie.e.shaffer@gmail.com	Boss		1	IMPERSONATE	FILTERS	EDIT
<input type="checkbox"/>	Hoffman	John	john.hoffman@madeup.net	Principal		1	IMPERSONATE	FILTERS	EDIT
<input type="checkbox"/>	Spielman	Sally	sally.spielman@imnotreal.org			2	IMPERSONATE	FILTERS	EDIT
<input type="checkbox"/>	Smith	Edie	edie.sargent@template.com	Principal		6	IMPERSONATE	FILTERS	EDIT

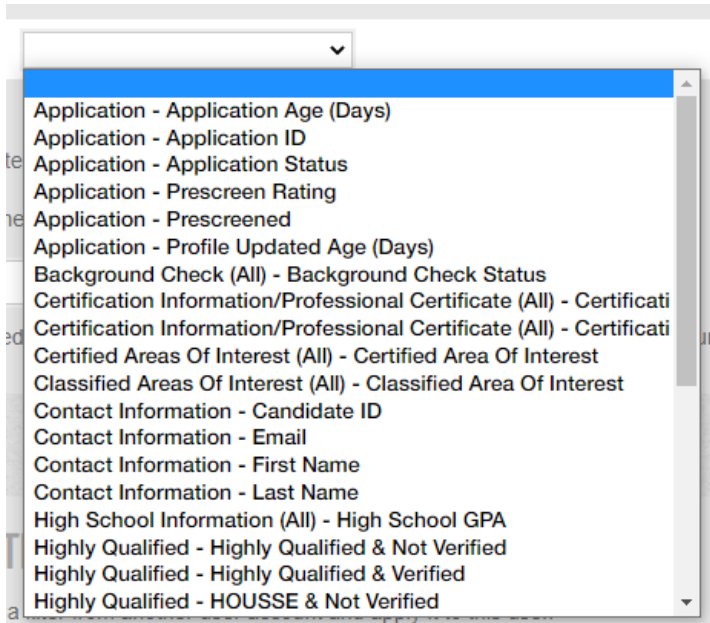
1

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.



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 JOHN HOFFMAN ⓘ

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 [dropdown] [x]

[ADD]

AND (All criteria must be true.)

OR (Only one criteria must be true.)

CUSTOM [input field]

Custom defined order of operations. Reference search rows using their display order number. Example: (1 AND (2 OR 3))

[CANCEL] [SAVE]

COPY FILTERS FROM ANOTHER USER

This will copy a filter from another user account and apply it to this user.

Select a User to Copy From [SELECT]

[COPY FILTER]

Customizing the filter allows you to create multiple combination sets.

Analyze Scenarios





Application Prescreened
Rating Equals Pass



Job Location Equals
Sunshine Elementary

1		Job - Location	Equals	Sunshine Elementary	✕
2	AND	Job - Position Title	Not Contain	Custodian	✕
3	AND	Job - Position Title	Not Contain	Maintenance	✕
4	AND	Application - Prescreen Rating	Equals	Pass	✕
5	AND	Interviews (All) - Interview Rating	Greater Than	3	✕
		ADD			



Interview Rating
Greater Than 3

Scenario A– Apple Grove ISD has a principal who needs to see applications for Elementary positions. We interviewed for the position and want to filter out anyone with an interview rating 3 or below.



Scenario B – Sunset needs to see all applicants who have position title: Counselor, Future EC-6. All applicants who are Paraprofessionals or Multiple Locations are not dependent on the other.

1		Job - Position Title	Contains	EC-6	✕
2	OR	Job - Location	Equals	Sunset Elementary	✕
3	OR	Job - Job Application Type	Equals	Paraprofessional	✕
4	OR	Job - Position Title	Contains	Future EC-6	✕
5	OR	Job - Position Title	Contains	Counselor	✕
6	OR	Job - Position Title	Contains	Instructional	✕
7	OR	Job - Location	Equals	Multiple Locations	✕

ADD

AND (All criteria must be true.)
 OR (Only one criteria must be true.)
 CUSTOM

Custom defined order of operations. Reference search rows using their display order number. Example: (1 AND (2 OR 3))

CANCEL **SAVE**

Position Title Contains EC-6



Position Title Contains EC-6

Job Location Equals Sunset Elementary

Job - Job Application Type Paraprofessional

Job - Position Title Contains Future EC-6

Job - Position Title Contains Counselor

Job - Position Title Contains Instructional

Job Location Equals Multiple Locations



Scenario C– Print Randall High School able to see all jobs at Randall and the District Wide. Within the needs to see can application that by HR or has a ‘C status. In addition needs to see any recommendation regardless of job location.

1	Job - Location	Equals	Randall High School	✕
2	CUSTOM Job - Location	Equals	District Wide	✕
3	CUSTOM Application - Application Stai	Equals	Complete	✕
4	CUSTOM Interviews (All) - Interview Re	Equals	Prelim	✕
5	CUSTOM Application - Application Stai	Equals	Certification Pending	✕

ADD

AND (All criteria must be true.)
 OR (Only one criteria must be true.)
 CUSTOM (1 OR 2 OR 4) AND (3 OR 5)

Custom defined order of operations. Reference search rows using their display order number. Example: (1 AND (2 OR 3))

CANCEL SAVE

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

Is the hiring manager only allowed to hire from a pool of candidates prescreened by HR?

If so, is the prescreen rating a concern?

Do they need to see all or some positions that are at their location?

Are any of the positions to be viewed in a posting with a job pool?

Do you want to ensure that all parts of the application are complete before allowing them to be viewed?

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 O	✕
3	CUSTOM	Job - Location	Equals	*Elementary - Countywide Opportunitie	✕
4	CUSTOM	Job - Location	Equals	*Elementary/Secondary - Countywide	✕
5	CUSTOM	Application - Application Sta	Equals	Application Complete - Unit I*	✕
6	CUSTOM	Application - Application Sta	Equals	Application Complete - Support Staff	✕
7	CUSTOM	Application - Application Sta	Equals	Hired	✕
8	CUSTOM	Application - Application Sta	Equals	Substitute - Processing Scheduled (se	✕

ADD



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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

Home > ... > Administrators > Applicant Tracking > Applicant Tracking Product Up...

OPTIONS ▾

Product Updates

Click on a knowledge base section below to view articles. You'll also find **Filters** to narrow down your search. Use **Options** and **Subscribe** to receive notifications on the whole knowledge base or just your filtered results.

Discussion Forums

Navigate to the Applicant Tracking Forum to start a discussion and use **Options** and **Subscribe** to receive updates and notifications.

Contact Support

Authorized contacts can visit the Case Portal to log a case with Support.

For performance disruption updates click here to read more.

Important Articles

Getting Started on PowerSchool Community

Getting Started Guide for Schoology Learning Customers

Getting Started in the Community for Naviance Customers

Can't find what you are looking for? Here are some Search tips to help!

How to Reset Community Password

Subscriptions and Notifications

Hmm Looks Like You Don't Have Access Error Message

Knowledge Base Articles

Applicant Tracking Release Notifications (21 Articles)

Unified Talent Applicant Tracking 23.2.0.0...
Unified Talent Applicant Tracking 22.5.1.0...
PowerSchool Applications System...
Unified Talent Applicant Tracking 22.4.0.0...
Unified Talent Applicant Tracking 22.3.0.0...

Applicant Tracking Product Communications (2 Articles)

Begin Hire - Records Employee Search (As...
Webinar Recording: Unified Talent...

Top Contributors

- AndreaP4
- NathanB2
- MuskanS
- DavidTes

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

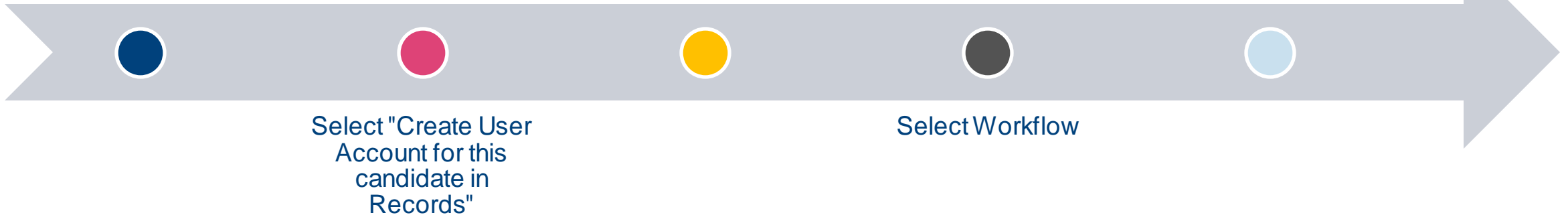
Best Practices for Begin Hire



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

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

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

RECORDS
Selected actions will occur when the hire is approved. These fields will not be saved when **Save Draft** is performed.

Create User account for this candidate in Records

The following demographic data will populate the staff record in TalentEd Records. You can update any of the following:

SEARCH RECORDS ⓘ Search Employee Records for staff to prevent creating duplicate accounts.

First Name:

Middle Name:

Last Name:

Email*:

Personal Email:

DOB : ⓘ

Employee ID :

SSN :

New Search Fields

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

RECORDS

Selected actions will occur when the hire is approved. These fields will not be saved when **Save Draft** is performed.

Create User account for this candidate in Records

The following demographic data will populate the staff record in TalentEd Records. You can update any of the following:

SEARCH RECORDS



Search Employee Records for staff to prevent creating duplicate accounts.

First Name: Elizabeth

Middle Name:

Last Name: Smith

Email*: PowerUp@template.test

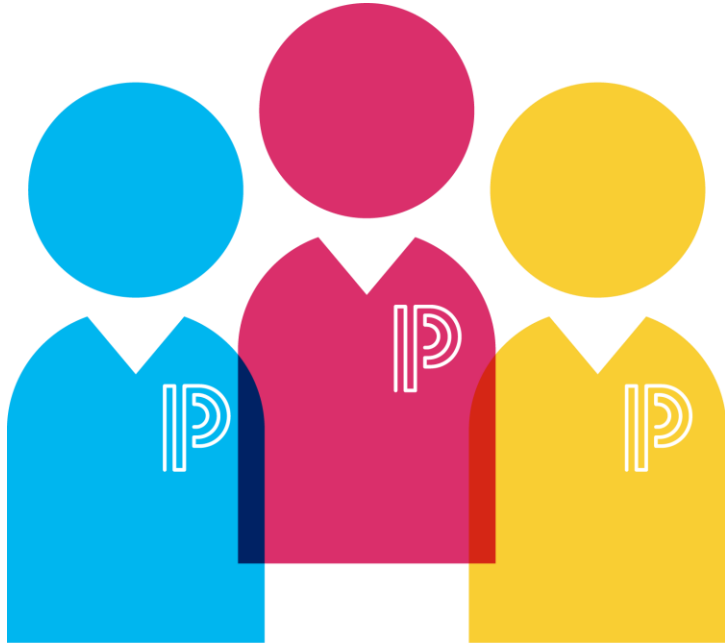
Personal Email: PowerUp@template.test

DOB : mm / dd / yyyy

Employee ID :

SSN : XXX-XX-XXXX or XXXXXXXXXX

Types of Hires



Brand New Hire

- No Account exists in Records

Rehire

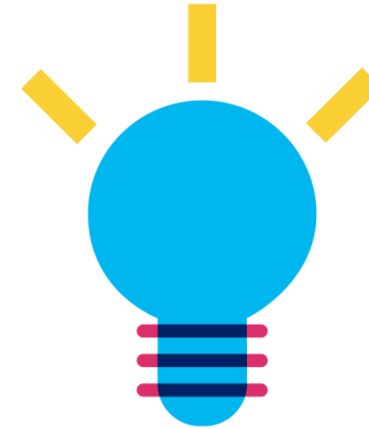
- Deactivated Account

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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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

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



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?

Unified Talent
Employee Records

My Tasks

Available Forms

Files

Filing

Contracts and Letters

Reports

Configuration

Custom Form Preview

Form: HR Termination Checklists

Assigned to the HR Associate

Employee ID

Full Name with Middle

Checklist

Tasks to complete

- Collect ID
- Terminate in eFinance
- Collect Laptop
- Send COBRA Information

Comments

If Benefitted

- Not Benefitted
- Send COBRA
- Term in benefits system

Comments

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

Form Status

Type of Termination

Effective Date of Termination required
Allowed format is MM/DD/YYYY Ex: 03/06/2023

Employee ID required

Full Name with Middle required
First Name Middle Name Last Name

Employee Type required

Primary Location required

Job Title required

Last Day of Work Allowed format is MM/DD/YYYY Ex: 03/06/2023

Benefit End Date Allowed format is MM/DD/YYYY Ex: 03/06/2023

Funding Source

Retirement

Comments



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Professional Learning

Cleaning up for the End of the Year























Agenda





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

Administration





System Administration

-  User Accounts
-  Staff Dashboards
-  Staff Groups
-  Course Dashboards
-  School/Sites
-  Layout Management
-  Configuration Management
-  System Authentication Setup
-  System Dates
-  Report Management
-  User Role Viewer
-  Rating Scale Administration
-  External Data Manager
-  UI Manager
-  Performance Matters Admin Job Launcher
-  Reactivate Evaluation Plans
-  Batch Manager
-  Lti Manager
-  Manage Branding
-  Guest Account Creation


Applications

-  Course Approval Administration
-  Credential Administration
-  Calibration Administration
-  Graph Administration
-  SLO Administration
-  Course Administration

Content Management

-  Content Repository
-  Content Repository Administration
-  Content Channels
-  Edit/Create Channels

Surveys/Assessments

-  Assessment Bank
-  Performance Assessment Manager
-  Survey Manager



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

A blue rectangular button with a white border and a slight shadow. The text "Office Management" is written in white, bold font. Below it, the same text "Office Management" is written in a smaller, lighter font.

Office Management
Office Management

Updating User Roles

- Updating User Roles
- Updating Offices
- [Manage Administrators](#)
- Making a User Inactive



Manage Administrators

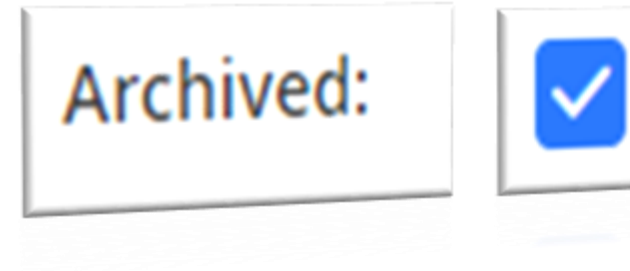
Updating User Roles

- Updating User Roles
- Updating Offices
- Manage Administrators
- [Making Users Inactive](#)



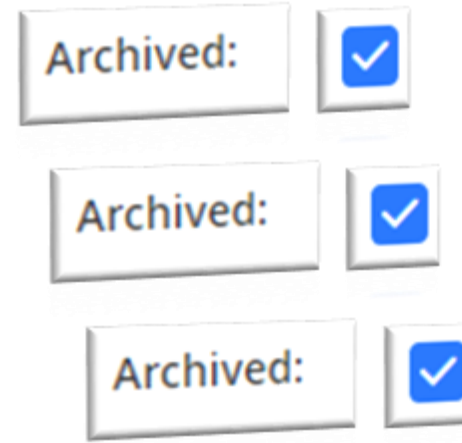
Archiving Courses

- [Archiving a Single Course](#)
- Bulk Archiving Courses

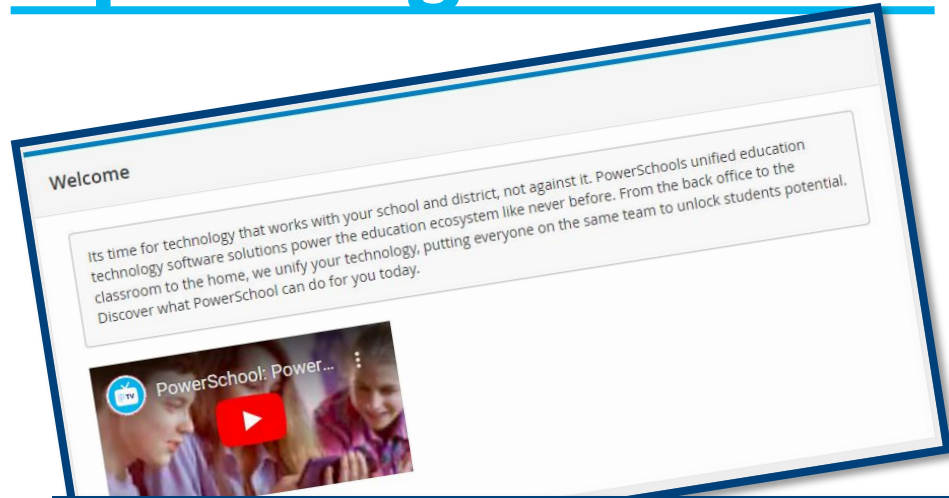


Archiving Courses

- Archiving a Single Course
- [Bulk Archiving Courses](#)



Updating Channels



Enhanced Portal

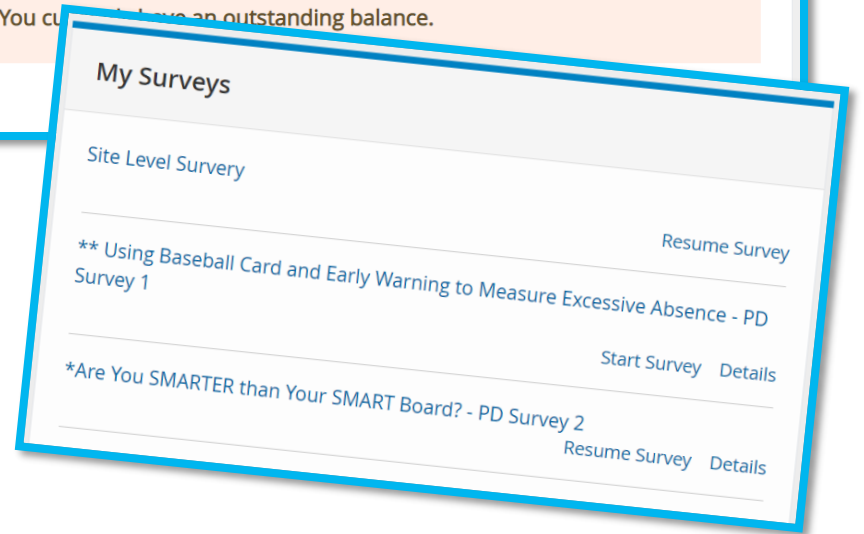
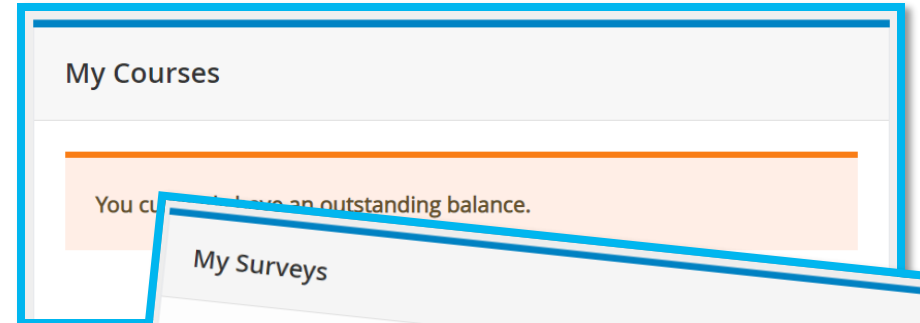
Welcome to Your Enhanced Portal Experience!

We have made a few changes to the look and feel of your portal. While your tabs and content have remained the same, there are a number of new, powerful tools for you to leverage -- an *always available* site toolbar to view calendar events and announcements, updated session management, the ability to bookmark within the site -- just to name a few.

Additional information:

- [Key Differences: Side By Side Comparison](#)

Your feedback is welcome. Please email your comments to enhanced-portal@truenorthlogic.com.





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