Welcome to the Special Programs PowerSchool PowerUp!

PowerSchool PowerUPs

August 8, 2023

Special Programs PowerUps Team

Robyn Skidmore

Senior Educational Impact Consultant (EIC)

- **Retired educator- 26 years in public education**
- **SPED/ Inclusion teacher**
- **Master of Special Education**
- **Endorsed Reading Specialist**

Support Team on call to assist with technical questions.

Please submit your questions into the Q&A during presentation.

There will be time for additional Q & A at end of the meeting if time allows.

Please use the survey at the end of the call for more technical questions to be addressed at the upcoming Office Hours.

Today’s Agenda

- Welcome and Overview
- Product Release Highlights
  - Version 23.6.1.0: July 14, 2023
- Document Template Tab Overview
  - Document Template Tabs/Menu
  - Setup Menu: More…, Security, Properties
    - Section Security
    - Template Behaviors
      - Override Document Template Behavior Options
  - Section Properties tab
    - Override Document Template Behavior: Section Properties
  - Fields tab
    - Override Document Template Behaviors: Fields
  - Field Properties tab
    - Override Document Template Behaviors: Field Properties
  - Review and Acknowledge Feature
  - Easy Edit tab
- Closing and Next Steps

Platform Release Highlights

Version SPPL 23.6.1.0

Released July 14, 2023

PowerSchool

New Features and Enhancements

- **Digital Signature**
  - Included a flag in the Configurator, such as ESignEnabled and ESignCompleted. This flag helps determine if the user is currently in the Digital Signature wizard, allowing for guided actions to be added as necessary.
- **Document Templates**
  - Admin users can now configure Preset Label/Comments in Document Templates

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Resolved Issues

- **Bulk Finalization of Documents**
  - Resolved an issue where users were not able to bulk finalize all documents for a student when the “Set Document Status to Final” option was selected.
- **eSchoolPlus exports**
  - Resolved an issue where the IEP Implementation Date populated the Special Ed start date when exporting to eSchoolPlus.

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Resolved Issues

- **Multi-dimensional Reports**
  - Resolved an issue where multi-dimensional reports were not rendering accurately within the Mozilla Firefox browser.
- **Special Programs Alerts**
  - The plugin from PowerSchool Special Programs was regenerated and loaded in PowerSchool SIS. With this release, Special Programs alerts are now sent to SIS..

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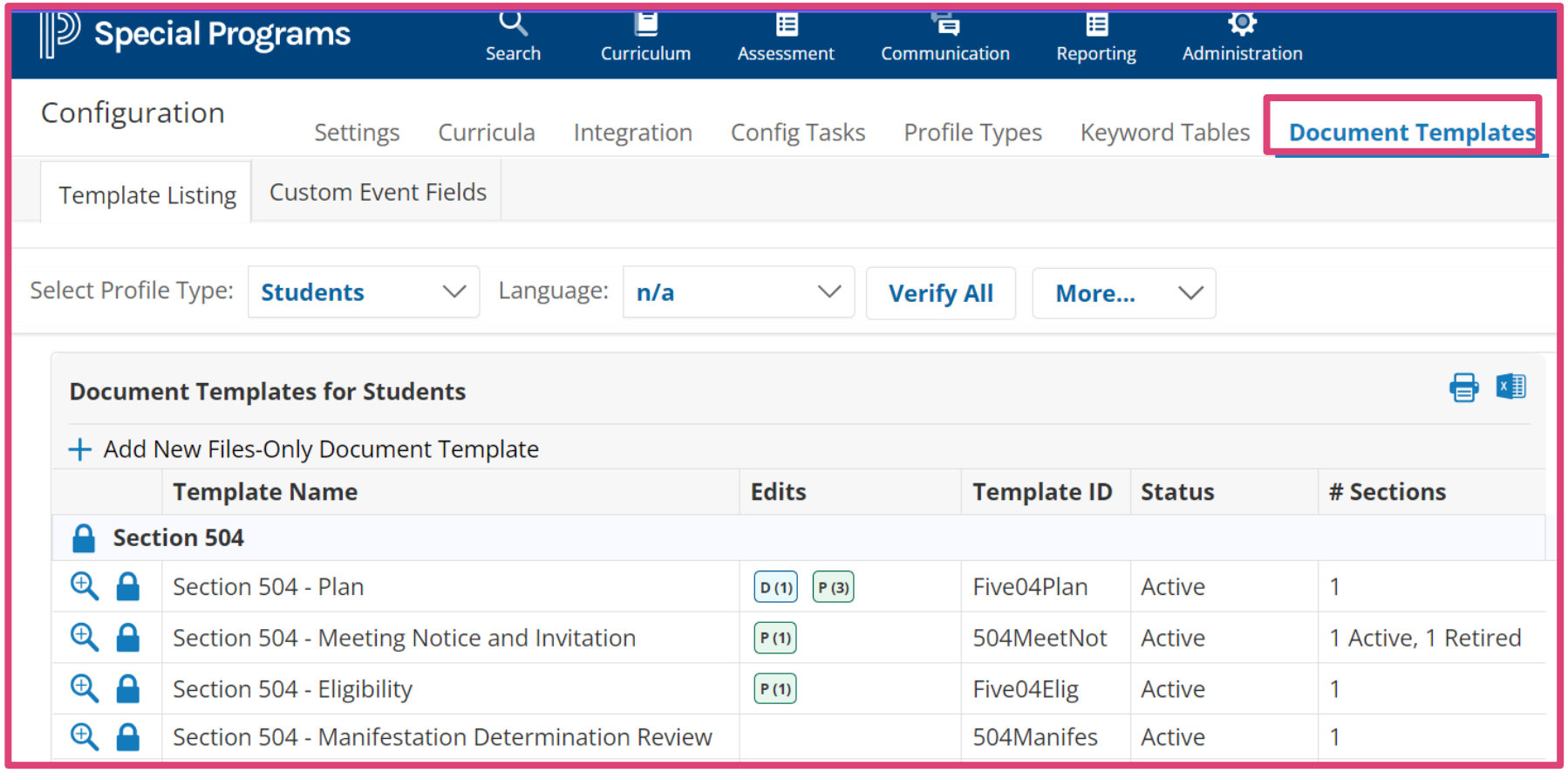
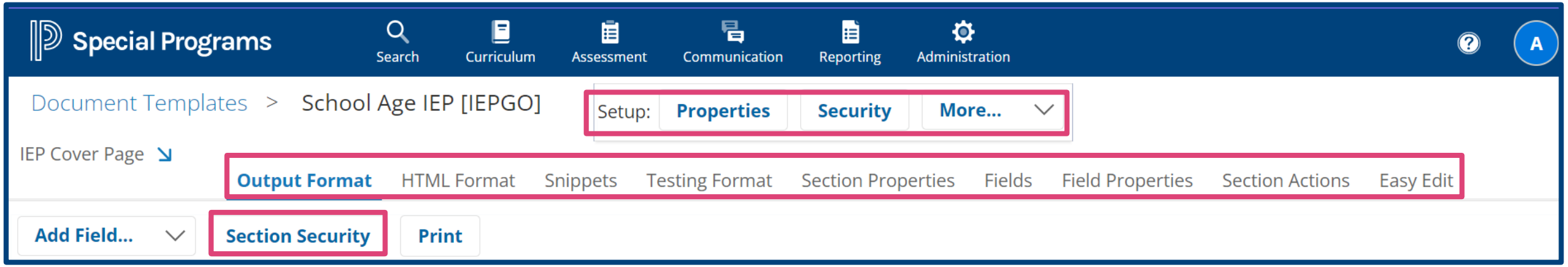
Document Templates

Document Template Tab Overview



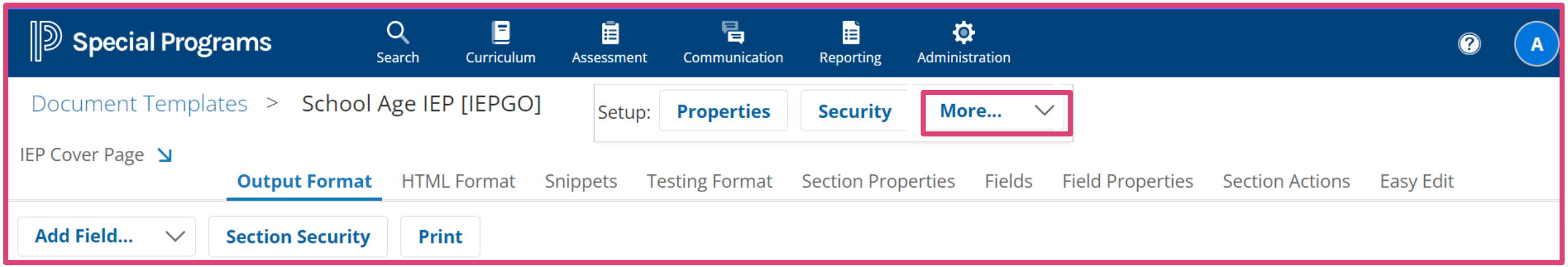
Administration > Configuration > Document Templates

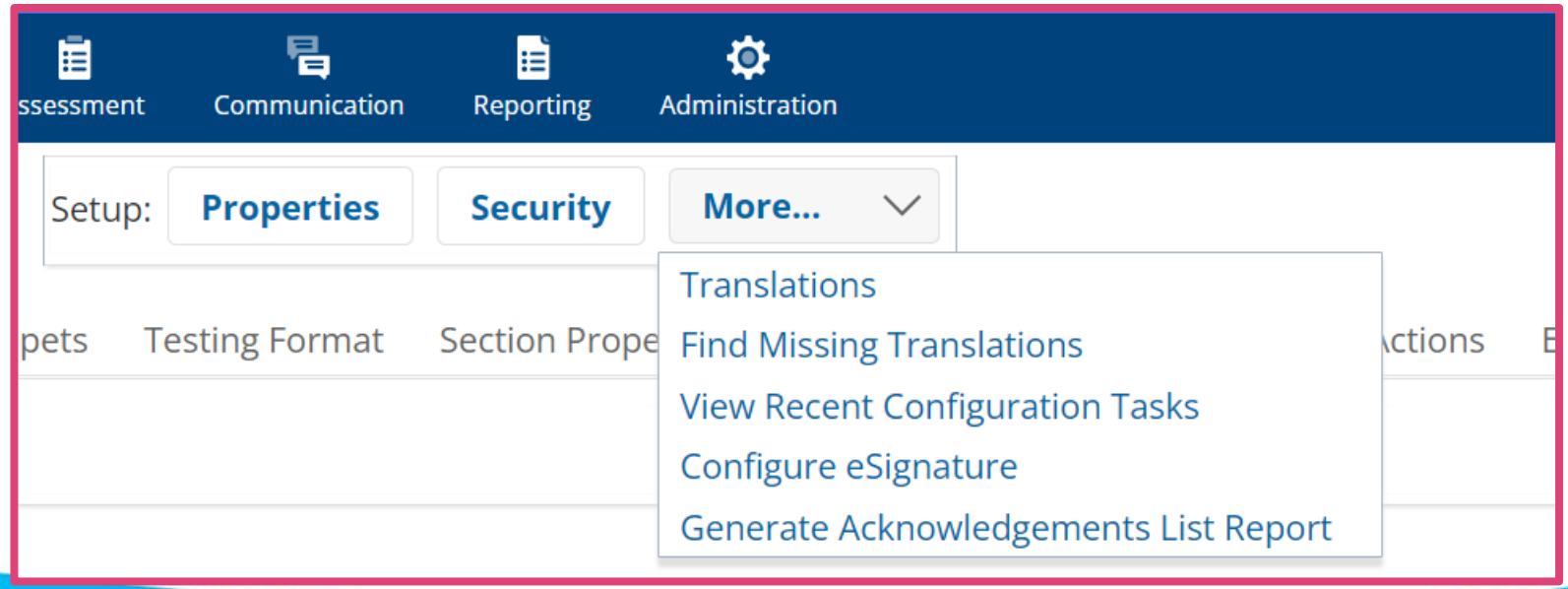
Document Template Tab Overview



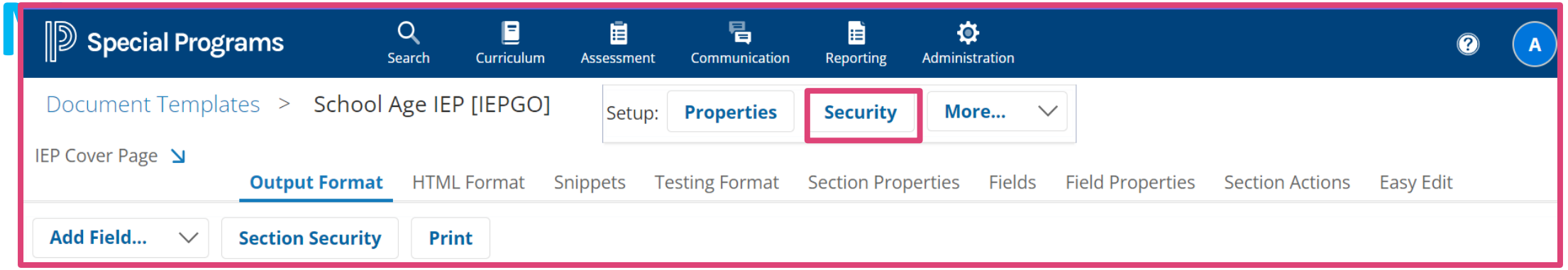
Administration > Configuration > Document Templates

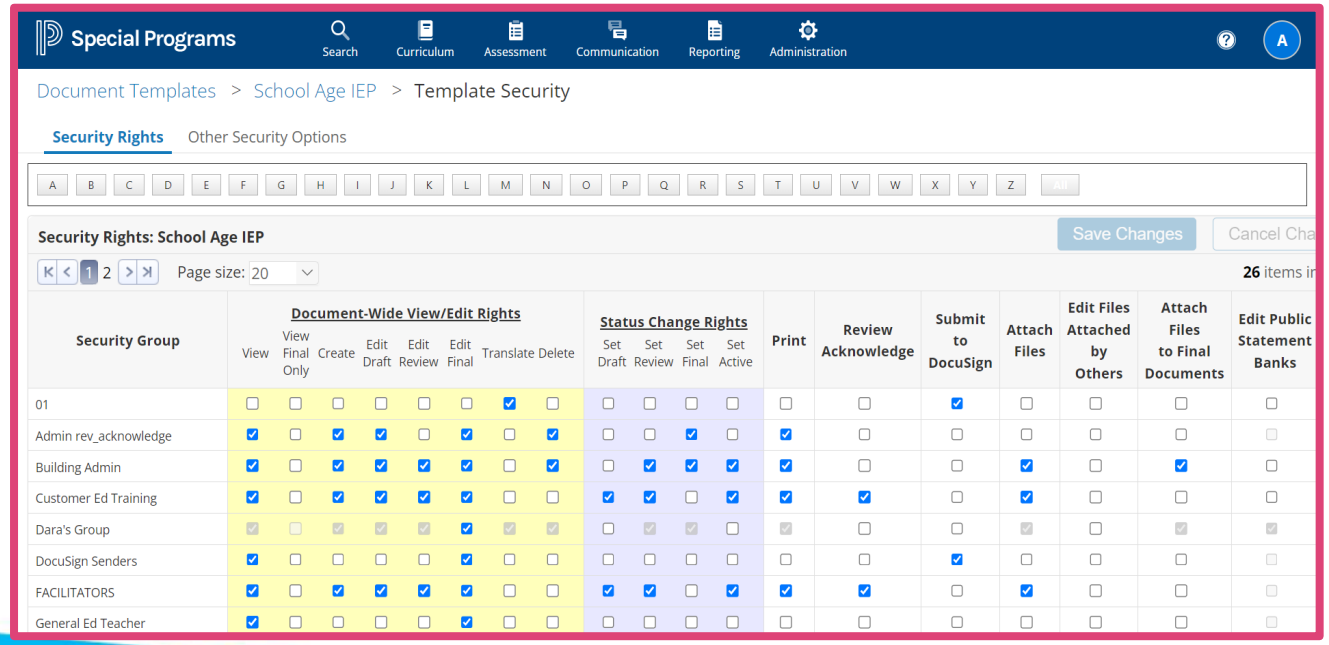
Document Template Tab: Setup Menu- More…





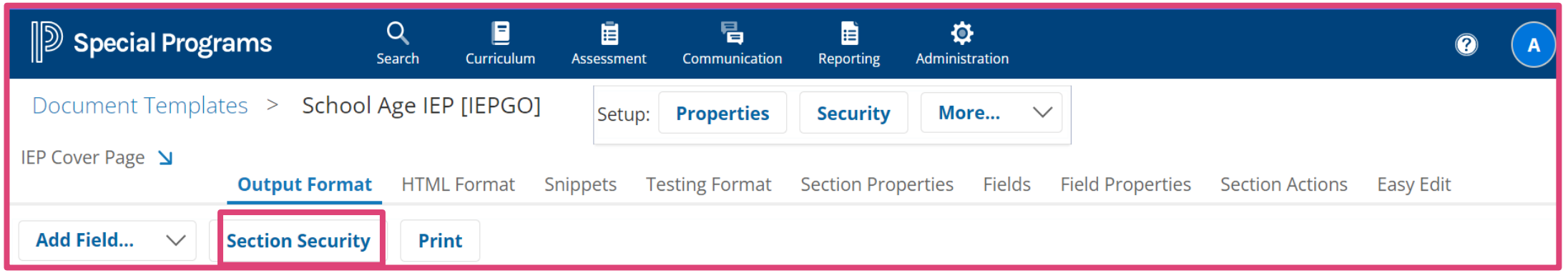
Document Template Tab: Setup Menu-Security

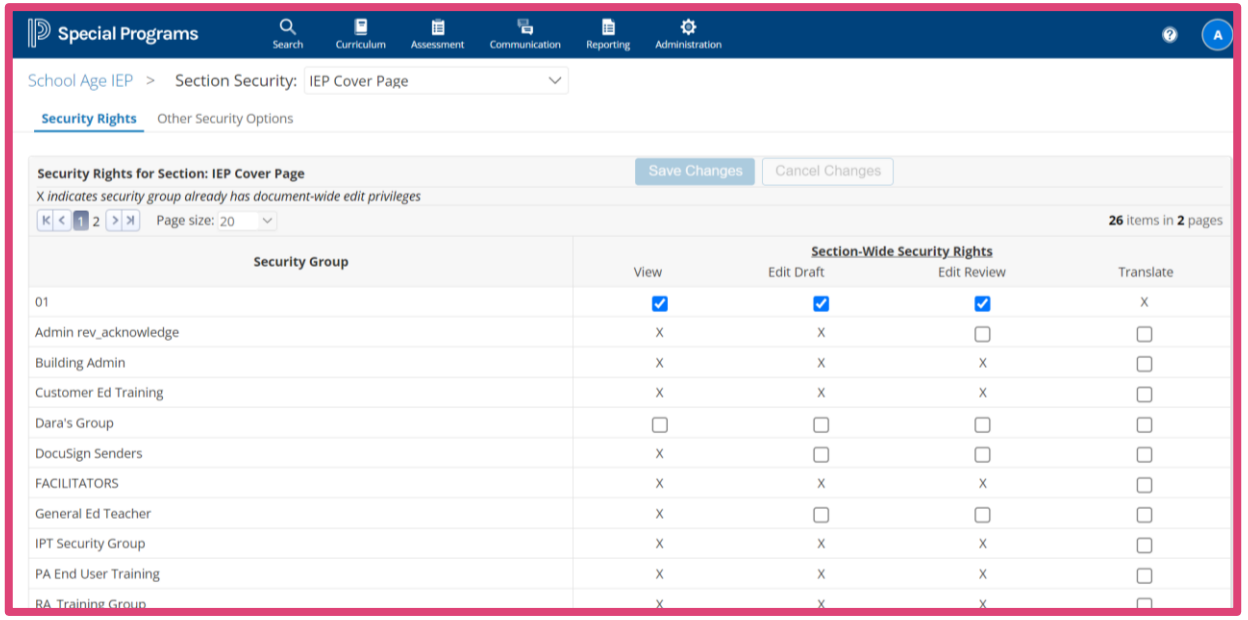




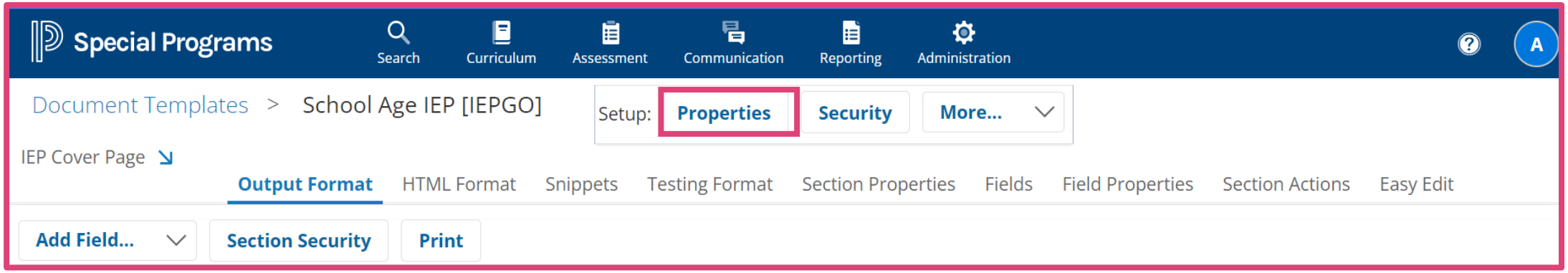
How will a specific security group interact with the document?

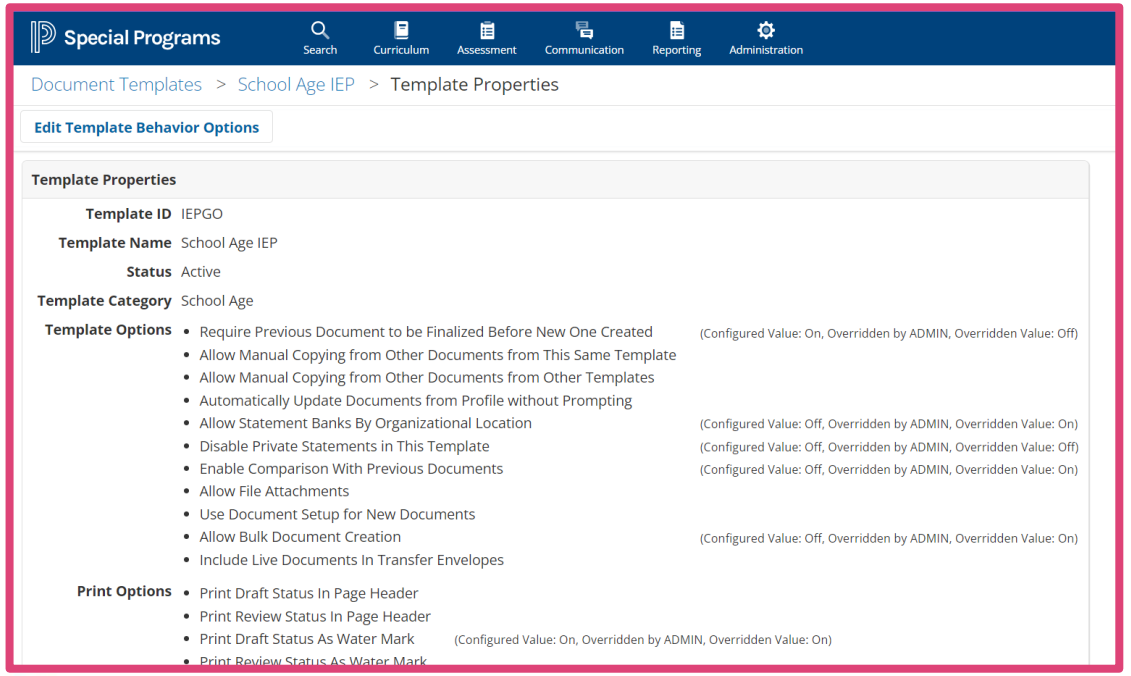
Document Template Tab: Section Security





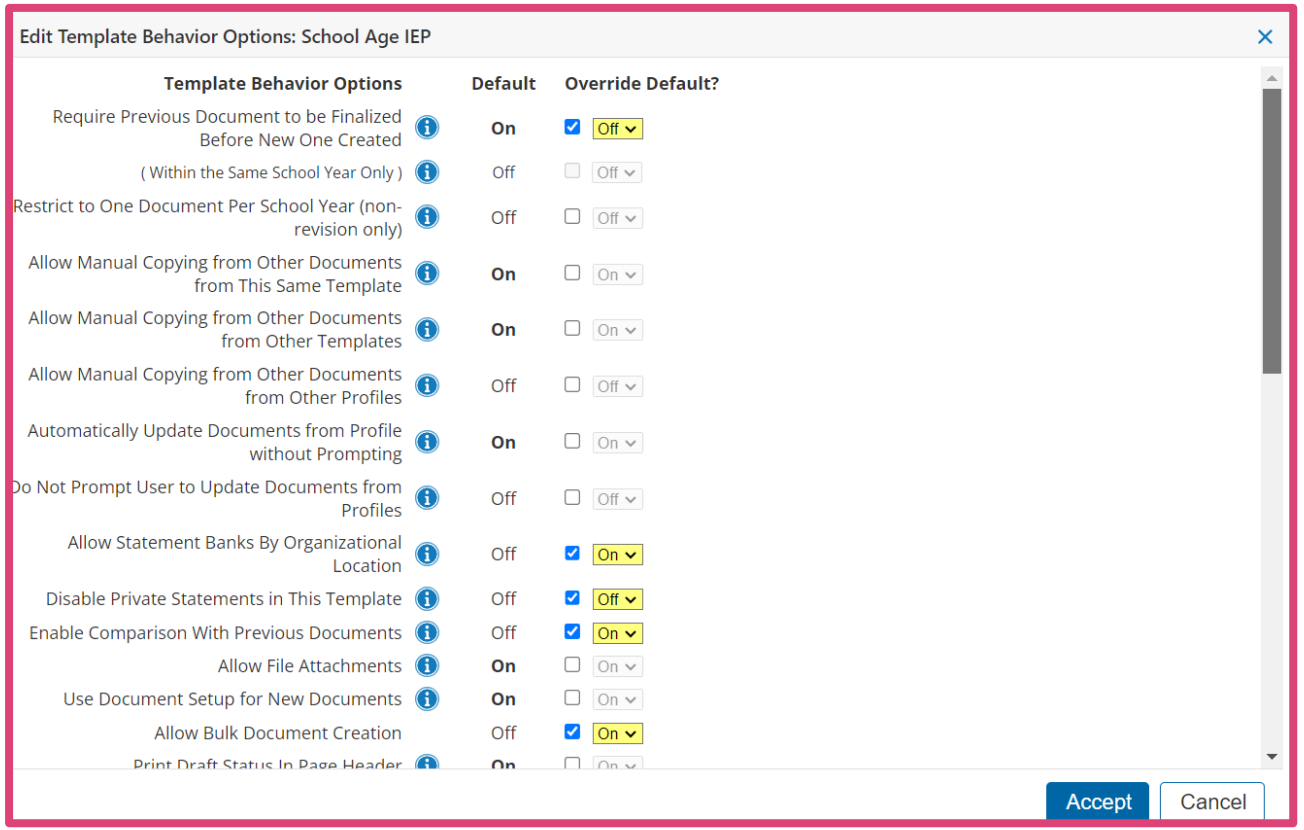
Document Template Tab: Setup Menu- Properties



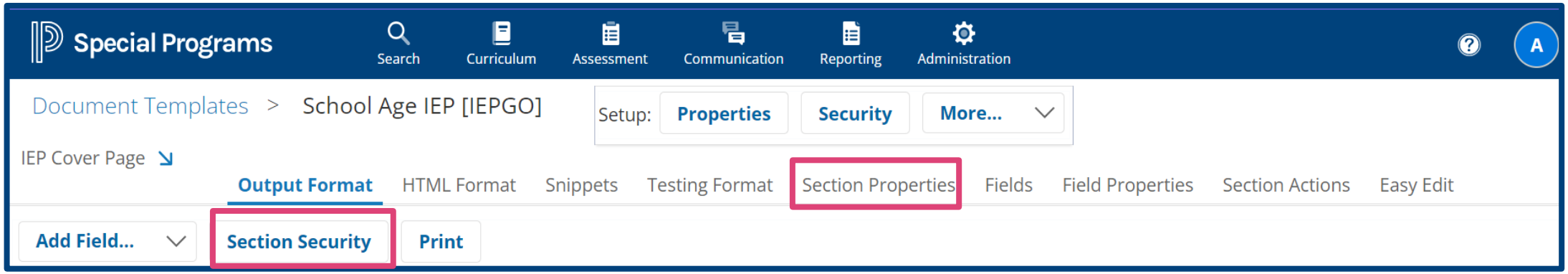


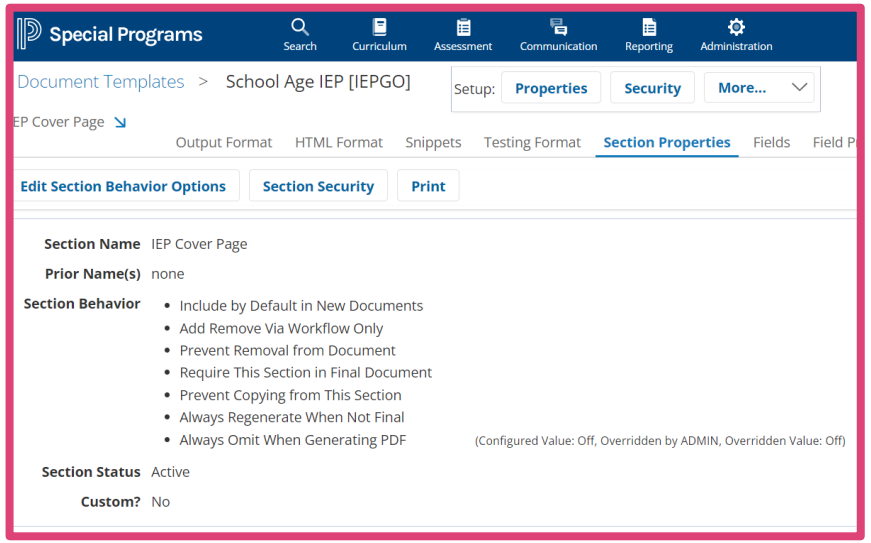
Override Document Template Behavior Options

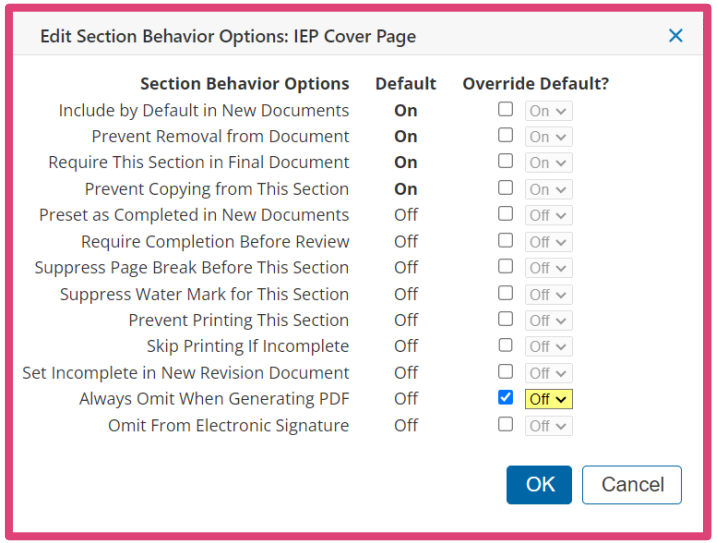
- ✓ Overrides are honored by product releases and highlighted to alert you to a non-default setting.
- ✓ Hover the pointer over the information icon to display the option description.



Document Template Section Properties

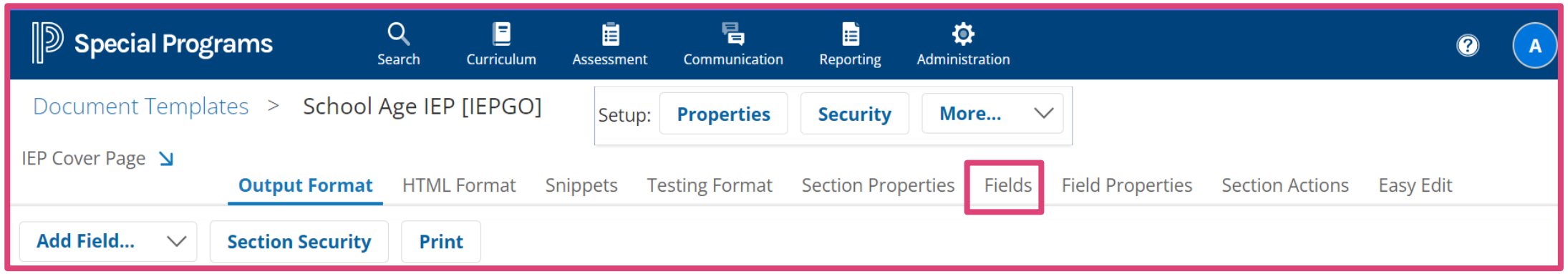


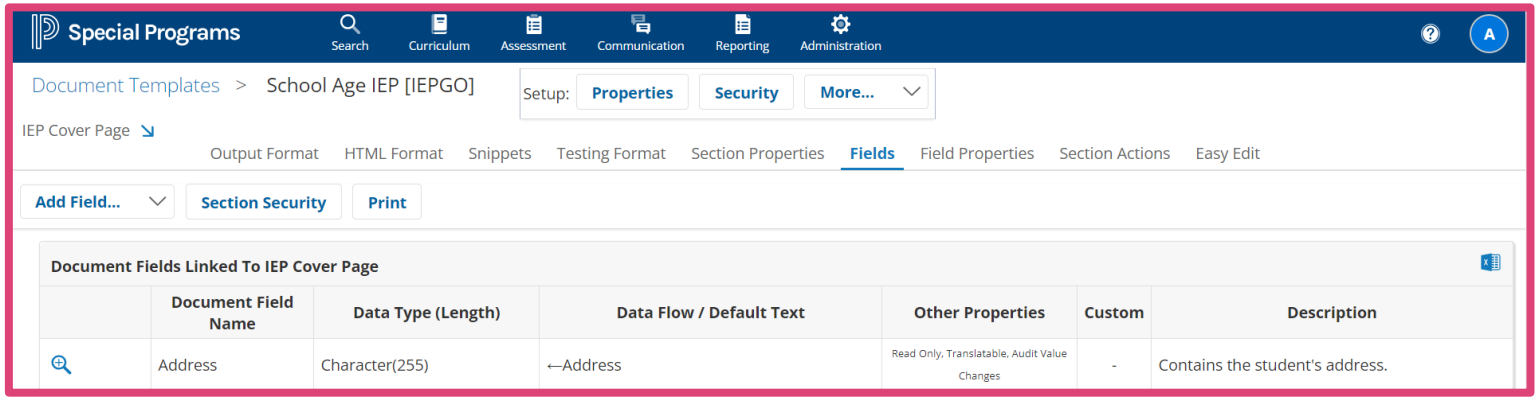




- ✓ Use the Flyout menu to access all sections of the document.
- ✓ Section Security can also be granted to Security Groups in each section.

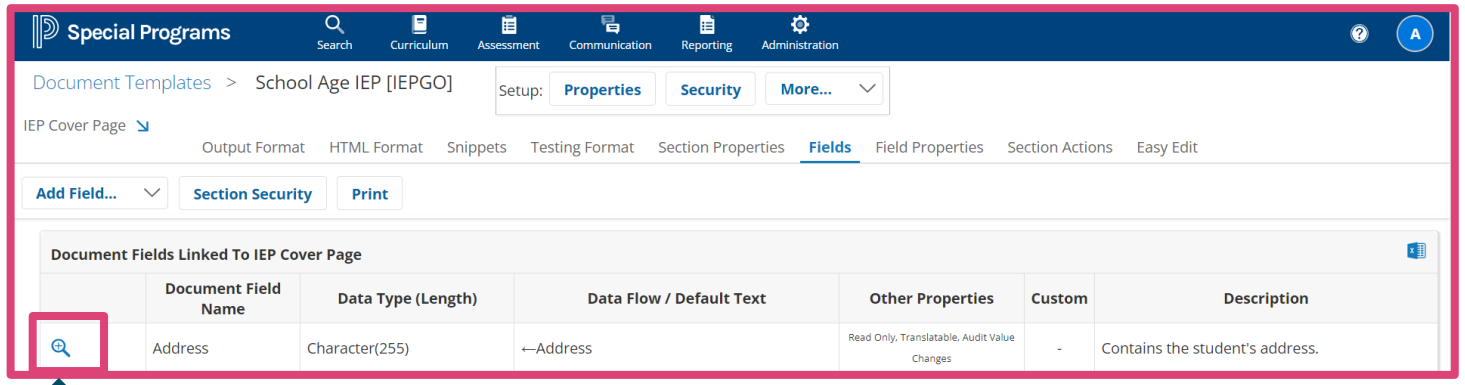
Document Templates: Fields



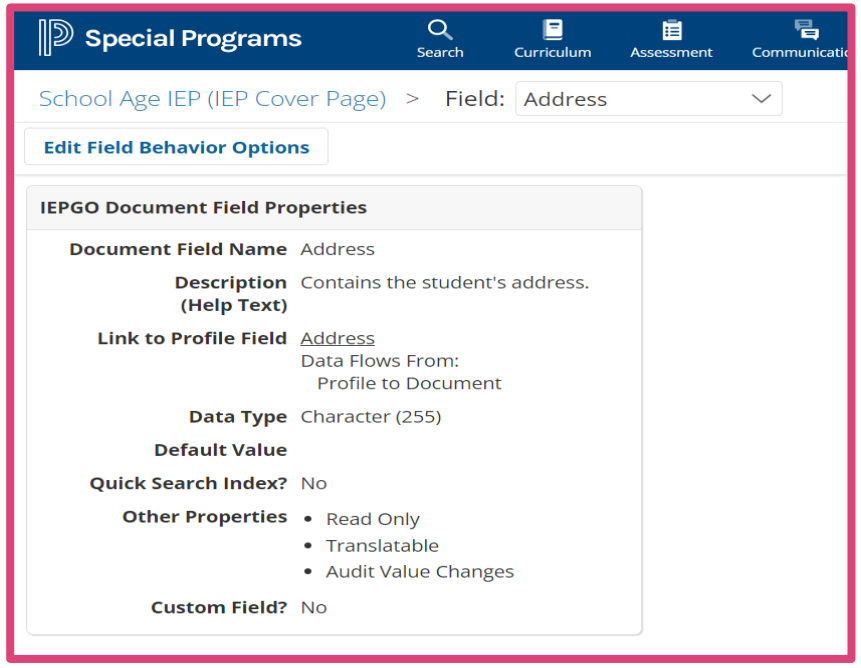


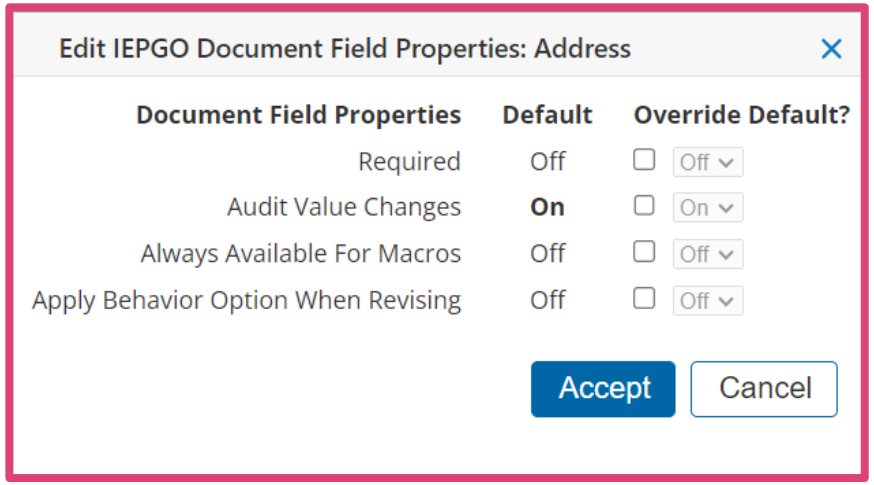
The Fields tab is the Data Dictionary Overview for the document.

Document Template: Fields

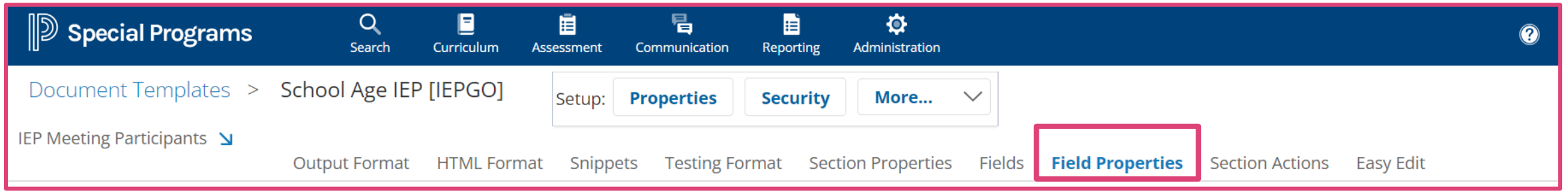


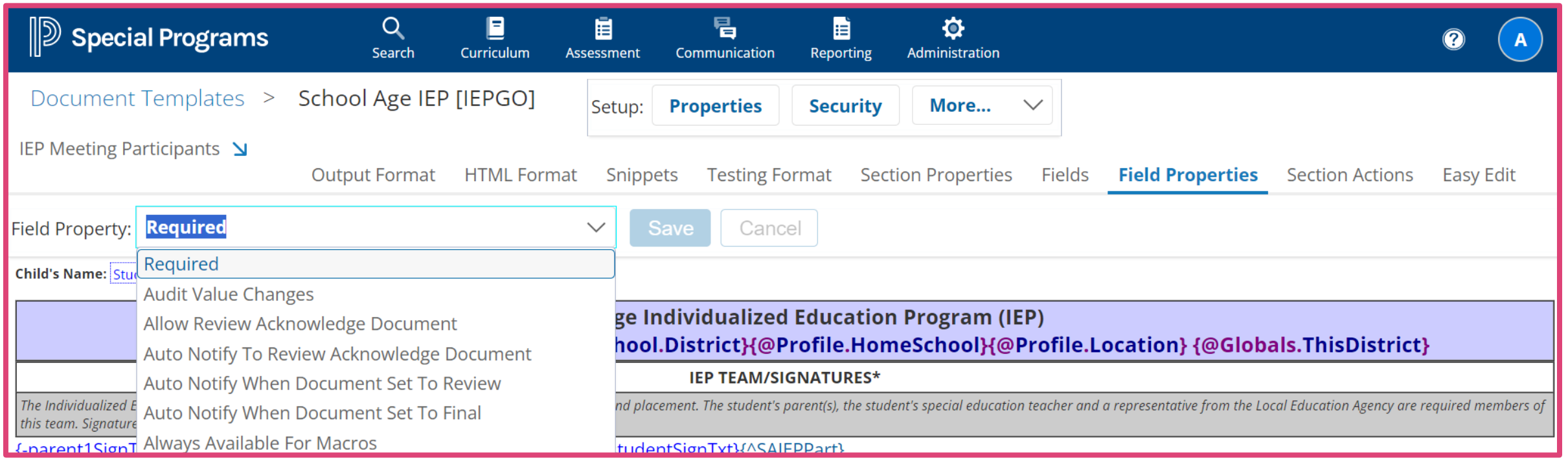
Use the magnifier glass to modify fields within each section.



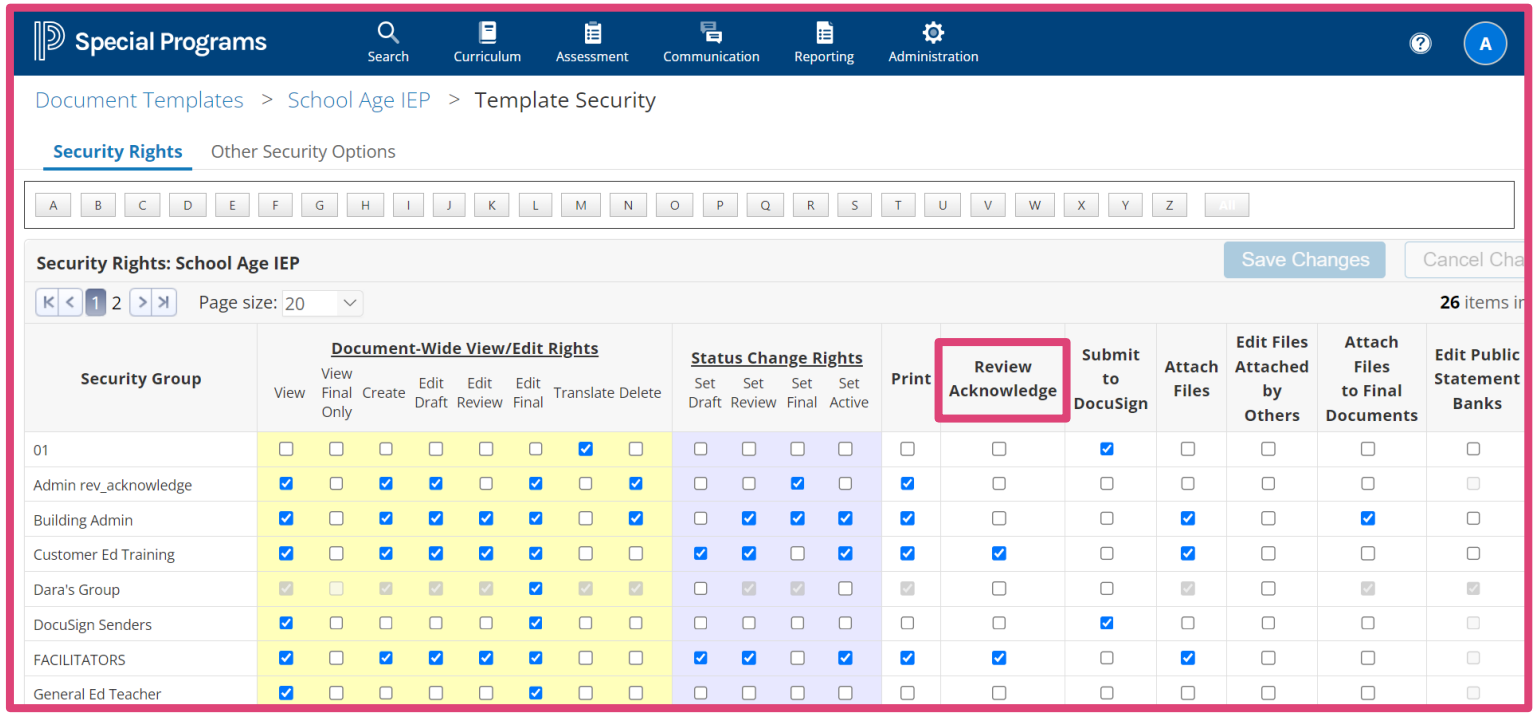


Document Template: Fields Properties





Review and Acknowledge Documents Feature

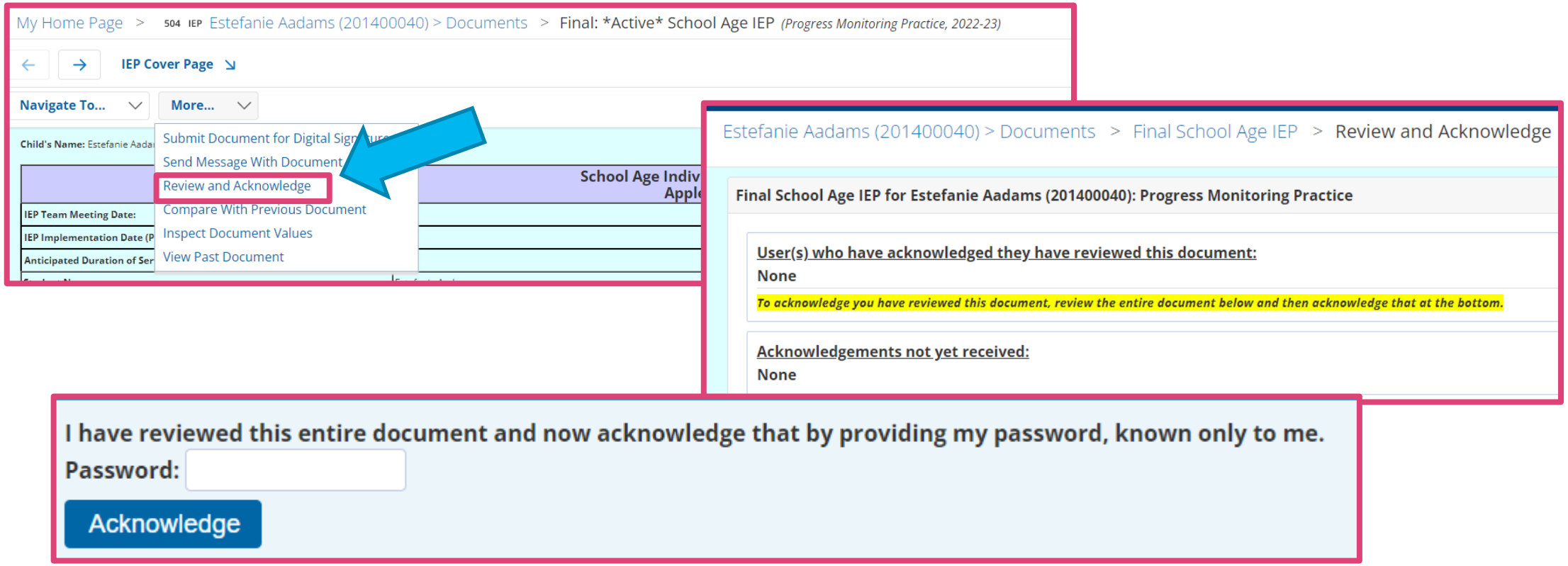


- Allows end-users with to review and acknowledge **FINALIZED** documents.
- Must have the appropriate Security Rights assigned by the System Administrator.

If the content of the document changes, Special Programs prompts the user to review and acknowledge the document again.

Administration > Configuration > Document Template > Select Document > Setup Menu> Security

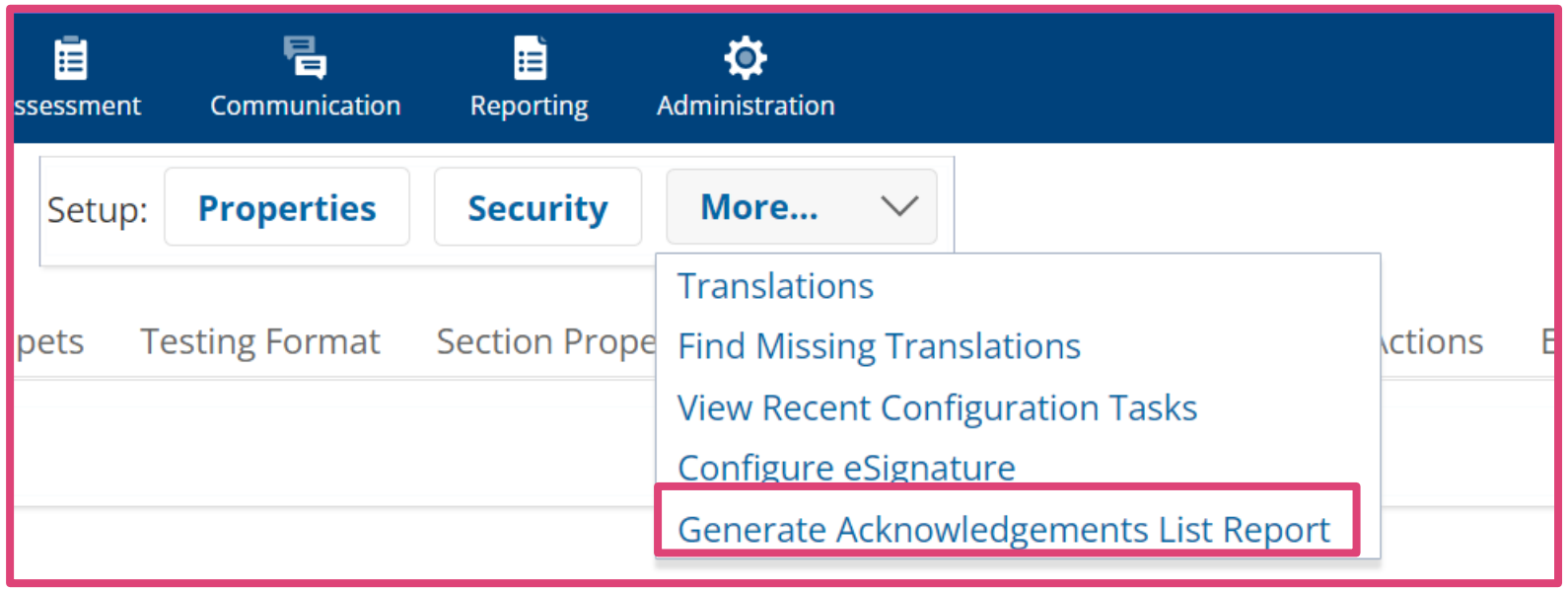
Review and Acknowledge Documents Feature



Knowledge is Power!

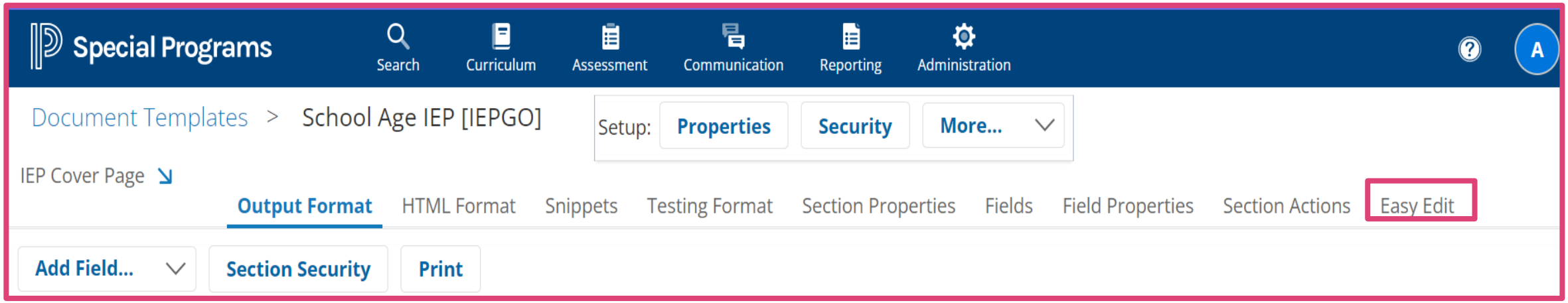
Access Review and Acknowledge with appropriate *Security* and if the document is *Finalized*.

Review and Acknowledge Documents Feature



Easy access report for tracking expected users and their acknowledgment request.

Easy Edit



- Add **new** content or **edit existing** content in your documents and forms.
  - Publish or Draft form.
  - Add or insert fields.
  - Add Directives and Functions.
  - Advanced Mode: Use HTML tags.
- Future releases will not override your customizations.
- Revert to PowerSchool version at any time.

PowerSchool recommends that you insert new sections instead of customizing PowerSchool content to ensure that you do not impact content designed to work with other reports or profiles.

Since PowerSchool does not overwrite your customizations, you will need to manually update when PowerSchool releases fixes or state required changes to the customized area.

Demo

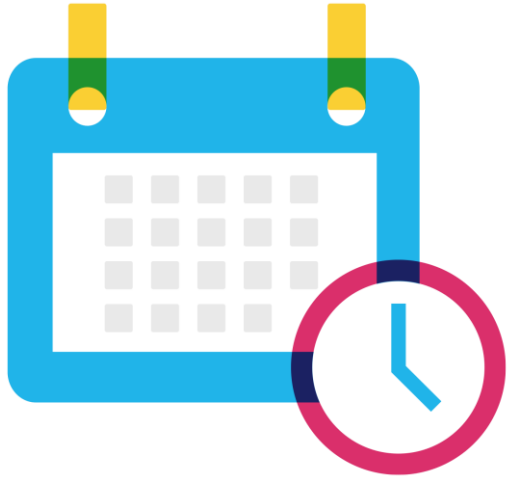
Special Programs 2023 PowerUp Events and Office Hours

August 16: *Special Programs Office Hours*
Topic: *Document Templates*

September 12: *Special Programs PowerUp*
September 20 : *Special Programs Office Hours*
Topic: TBD

October 10: *Special Programs PowerUp*
October 18: *Special Programs Office Hours*
Topic: TBD

November 14: *Programs PowerUp*
November 15: *Special Programs Office Hours*
Topic: TBD



Please Share Your Feedback!

- You will be asked to take a **short survey** when leaving the Zoom Meeting

- Help us help you – We value **your feedback** and use it to create future sessions

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Resources: General

PowerSchool Community	In-Platform User Help
PowerSchool Community	Communications and Calendar
Special Programs PowerUps 2023 Series Registration	Review and Acknowledge
Special Programs Office Hours 2023 Registration	
PowerUp Events (All Products)	
Technical Contacts	
Contact Support	
Case Portal Priority Definitions	
Subscriptions and Notifications	

Resources: General

Special Programs Release Notes	Special Programs Release Notes	Special Programs PowerUps
Platform Release 22.11.0.0 Release date: December 16, 2022	Platform Release 23.6.0.0 Release Date June 16, 2023	Special Programs PowerUps 2022 Series
Platform Release 22.11.1.0 Release date: January 27, 2023	Platform Release 23.6.1.0 Release Date: July 14, 2023	
Platform Release: 22.11.2.0 Release date: February 17, 2023		**Office Hours**
Platform Release: 22.11.3.0 Release date: March 178, 2023		Office Hours 2020 Series
Platform Release: 22.11.4.0 Release Date: April 21, 2023		Office Hours 2020 Series
Platform Release: 22.11.5.0 Release Date: May 19, 2023		Office Hours 2020 Series

Resources: Reporting

Reporting		
Office Hours | PowerSchool Special Programs - July 16, 2020	Reporting main screen navigation basics	Creating Reports When Using the "Review & Acknowledge" Feature
Office Hours Recording: Reports - June 24, 2021	Report creation basics in Special Programs	
Office Hours Recording: Reports - Part 2 - July 29, 2021	Profile Reports in Special Programs	
PowerSchool Special Programs PowerUp: Reporting January	Creating Document Reports in Special Programs	
Finding profile field names	Editing Report columns	
Finding Field and Template Names for Report Use	Editing the report properties and selection formula	
How to sort a report	Working With Date Fields in the Report Selection Criteria Formula	

Resources: Digital Signature

Community Links	Previous Office Hours Recording	In Platform User Guide
How-To: Configure Digital Signature	Office Hours: Digital Signature- June 30, 2022	Digital Signature Special Programs User
How-To: List Statuses for Digital Signature Configured Documents		Manage Signature Requests Special Programs User
How-To: Opt-Out of Digital Signature		Digital Signature Special Programs System Administrator
How-To: Configure Notification Email for Digital Signature		
How-To: Check Digital Signature Status of Students		
How-To: List Statuses for Digital Signature Configured Document Templates		

Resources: Language Translations

Community Links	Previous Office Hours Recording	Previous Power Ups Recording	In-Platform User Guide
How-To: Document Translations- Translating a Document Template	Translations- June 2020	Translations August 9, 2022	Special Programs- System Administrator: Configure Security for Language Translators
How-To: Document Translations - Maintaining Translated Documents	Translations- August 2022		Special Programs User: Document Language Translation
How-To: Document Translations - Keyword Table Setup			
How-To: Document Translations - Staff Security Setup			
How-To: Localize Standard Reports			

Resources: Integrations

Community Links: Special Programs/SIS	Community Links: Special Programs/SIS	Community Links: Special Programs/SIS	Previous Office Hours Recording	Previous Power Ups Recording	In-Platform User Guide
How-To: Special Programs/PS SIS Integrations 101	How-To: Special Programs/PS SIS Integrations 107	How-To: Special Programs / PS SIS Integration 113	PowerSchool Special Programs - Aug 27, 2020	Integrations- March 2022	PowerSchool SIS Integration
How-To: Special Programs/PS SIS Integrations 102	How-To: Special Programs/PS SIS Integrations 108		Integrations and Dataflow - Part 1 March 31, 2022		Schoology Integration
How-To: Special Programs/PS SIS Integrations 103	How-To: Special Programs/PS SIS Integrations 109		Integration and Dataflow - Part 2 - April 28, 2022		
How-To: Special Programs/PS SIS Integrations 104	How-To: Special Programs/PS SIS Integrations 110				
How-To: Special Programs/PS SIS Integrations 105	How-To: Special Programs/PS SIS Integrations 111				
How-To: Special Programs/PS SIS Integrations 106	How-To: Special Programs/PS SIS Integrations 112				

Resources: End of Year Rollover

Previous Office Hours Recordings	Previous PowerUps Recordings	In-Platform User Guide
Office Hours Recording: End of Year Rollover, and Ideas Portal - May 2022	PowerUps Recording: End of Year Rollover - May 2022	End-of-Year Rollover

Resources: Document Templates

Previous Office Hours Recordings	Community Articles	In-Platform User Guide
Document / Field Dataflow	How To Use Easy Edit (Community article)	Document Templates Tab Overview
Templates and Easy Edits	How-To: Set / Edit Field Properties for Self-Hosted Database in Special Programs	Document Template Tab: Setup Menu-Security
	Q&A: Easy Edit - What Fields Can I Add to My Document?	Override Document Template Behavior Options
	Q&A: Easy Edit- Handling Customizations along with the Model Updates	Override Document Template Field Properties
	How-To: Editing Globals Profile Values (District Info, First/Last Day of School, Etc.)	Review and Acknowledge Feature (System Admin Help) Review and Acknowledge Documents (User Help)
	How-To: Edit Document Template Security Permissions	Easy Edit
	How-To: Configuring Other and Alternate Document Template Security Rights in Special Programs	

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Proven Practices | provenpractices@powerschool.com
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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

Thank you for your Partnership!

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