

# 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

# 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

# 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.

# 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..

# Document Templates



# Document Template Tab Overview

Special Programs

Search Curriculum Assessment Communication Reporting Administration

Configuration Settings Curricula Integration Config Tasks Profile Types Keyword Tables **Document Templates**

Template Listing Custom Event Fields

Select Profile Type: **Students** Language: **n/a** **Verify All** **More...**

**Document Templates for Students**

+ Add New Files-Only Document Template

	Template Name	Edits	Template ID	Status	# Sections
	<b>Section 504</b>				
	Section 504 - Plan		Five04Plan	Active	1
	Section 504 - Meeting Notice and Invitation		504MeetNot	Active	1 Active, 1 Retired
	Section 504 - Eligibility		Five04Elig	Active	1
	Section 504 - Manifestation Determination Review		504Manifes	Active	1

Administration > Configuration > Document Templates

# Document Template Tab Overview

The screenshot displays the 'Special Programs' interface. At the top, there is a navigation bar with icons for Search, Curriculum, Assessment, Communication, Reporting, and Administration. Below this, the breadcrumb path is 'Document Templates > School Age IEP [IEPGO]'. A 'Setup:' menu is open, showing 'Properties', 'Security', and 'More...' options. Below the breadcrumb, there is a sub-menu for 'IEP Cover Page' with options: 'Output Format', 'HTML Format', 'Snippets', 'Testing Format', 'Section Properties', 'Fields', 'Field Properties', 'Section Actions', and 'Easy Edit'. At the bottom, there are buttons for 'Add Field...', 'Section Security', and 'Print'.

Administration > Configuration > Document Templates

# Document Template Tab: Setup Menu- More...

The screenshot shows the 'Special Programs' interface. At the top, there is a navigation bar with icons for Search, Curriculum, Assessment, Communication, Reporting, and Administration. Below this, the breadcrumb path is 'Document Templates > School Age IEP [IEPGO]'. The 'Setup:' section contains three buttons: 'Properties', 'Security', and 'More...'. The 'More...' button is highlighted with a red box. Below the 'Setup' section, there is a row of tabs: 'Output Format', 'HTML Format', 'Snippets', 'Testing Format', 'Section Properties', 'Fields', 'Field Properties', 'Section Actions', and 'Easy Edit'. At the bottom, there are three buttons: 'Add Field...', 'Section Security', and 'Print'.

This close-up screenshot shows the 'More...' dropdown menu. The menu items are: 'Translations', 'Find Missing Translations', 'View Recent Configuration Tasks', 'Configure eSignature', and 'Generate Acknowledgements List Report'. The background shows the 'Assessment', 'Communication', 'Reporting', and 'Administration' navigation icons and the 'Setup:' section with 'Properties', 'Security', and 'More...' buttons.

# Document Template Tab: Setup Menu-Security

Special Programs | Search | Curriculum | Assessment | Communication | Reporting | Administration

Document Templates > School Age IEP [IEPGO]

Setup: **Properties** **Security** More...

IEP Cover Page

**Output Format** | HTML Format | Snippets | Testing Format | Section Properties | Fields | Field Properties | Section Actions | Easy Edit

Add Field... | **Section Security** | Print

Special Programs | Search | Curriculum | Assessment | Communication | Reporting | Administration

Document Templates > School Age IEP > Template Security

**Security Rights** | Other Security Options

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Security Rights: School Age IEP | Save Changes | Cancel Changes

Page size: 20 | 26 items in

Security Group	Document-Wide View/Edit Rights								Status Change Rights				Print	Review Acknowledge	Submit to DocuSign	Attach Files	Edit Files Attached by Others	Attach Files to Final Documents	Edit Public Statement Banks
	View	Final Only	Create	Edit Draft	Edit Review	Edit Final	Translate	Delete	Set Draft	Set Review	Set Final	Set Active							
01	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin rev_acknowledge	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Building Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Ed Training	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dara's Group	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DocuSign Senders	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FACILITATORS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General Ed Teacher	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



How will a specific security group interact with the document?

# Document Template Tab: Section Security

Special Programs Search Curriculum Assessment Communication Reporting Administration

Document Templates > School Age IEP [IEPGO] Setup: **Properties** **Security** More...

IEP Cover Page

**Output Format** HTML Format Snippets Testing Format Section Properties Fields Field Properties Section Actions Easy Edit

Add Field... **Section Security** Print

Special Programs Search Curriculum Assessment Communication Reporting Administration

School Age IEP > Section Security: IEP Cover Page

Security Rights Other Security Options

Security Rights for Section: IEP Cover Page Save Changes Cancel Changes

X indicates security group already has document-wide edit privileges

Page size: 20 26 items in 2 pages

Security Group	View	Section-Wide Security Rights		
		Edit Draft	Edit Review	Translate
01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	X
Admin rev_acknowledge	X	X	<input type="checkbox"/>	<input type="checkbox"/>
Building Admin	X	X	X	<input type="checkbox"/>
Customer Ed Training	X	X	X	<input type="checkbox"/>
Dara's Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DocuSign Senders	X	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FACILITATORS	X	X	X	<input type="checkbox"/>
General Ed Teacher	X	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IPT Security Group	X	X	X	<input type="checkbox"/>
PA End User Training	X	X	X	<input type="checkbox"/>
PA Training Group	X	X	X	<input type="checkbox"/>

# Document Template Tab: Setup Menu- Properties

Special Programs | Search | Curriculum | Assessment | Communication | Reporting | Administration

Document Templates > School Age IEP [IEPGO] | Setup: **Properties** | Security | More... ▾

IEP Cover Page ▾

**Output Format** | HTML Format | Snippets | Testing Format | Section Properties | Fields | Field Properties | Section Actions | Easy Edit

Add Field... ▾ | Section Security | Print

Special Programs | Search | Curriculum | Assessment | Communication | Reporting | Administration

Document Templates > School Age IEP > Template Properties

Edit Template Behavior Options

**Template Properties**

**Template ID** IEPGO  
**Template Name** School Age IEP  
**Status** Active  
**Template Category** School Age

**Template Options**

- Require Previous Document to be Finalized Before New One Created (Configured Value: On, Overridden by ADMIN, Overridden Value: Off)
- Allow Manual Copying from Other Documents from This Same Template
- Allow Manual Copying from Other Documents from Other Templates
- Automatically Update Documents from Profile without Prompting
- Allow Statement Banks By Organizational Location (Configured Value: Off, Overridden by ADMIN, Overridden Value: On)
- Disable Private Statements in This Template (Configured Value: Off, Overridden by ADMIN, Overridden Value: Off)
- Enable Comparison With Previous Documents (Configured Value: Off, Overridden by ADMIN, Overridden Value: On)
- Allow File Attachments
- Use Document Setup for New Documents
- Allow Bulk Document Creation (Configured Value: Off, Overridden by ADMIN, Overridden Value: On)
- Include Live Documents In Transfer Envelopes

**Print Options**

- Print Draft Status In Page Header
- Print Review Status In Page Header
- Print Draft Status As Water Mark (Configured Value: On, Overridden by ADMIN, Overridden Value: On)
- Print Review Status As Water Mark

# 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.

Edit Template Behavior Options: School Age IEP

Template Behavior Options	Default	Override Default?
Require Previous Document to be Finalized Before New One Created ( Within the Same School Year Only )	On	<input checked="" type="checkbox"/> Off
Restrict to One Document Per School Year (non-revision only)	Off	<input type="checkbox"/> Off
Allow Manual Copying from Other Documents from This Same Template	On	<input type="checkbox"/> On
Allow Manual Copying from Other Documents from Other Templates	On	<input type="checkbox"/> On
Allow Manual Copying from Other Documents from Other Profiles	Off	<input type="checkbox"/> Off
Automatically Update Documents from Profile without Prompting	On	<input type="checkbox"/> On
Do Not Prompt User to Update Documents from Profiles	Off	<input type="checkbox"/> Off
Allow Statement Banks By Organizational Location	Off	<input checked="" type="checkbox"/> On
Disable Private Statements in This Template	Off	<input checked="" type="checkbox"/> Off
Enable Comparison With Previous Documents	Off	<input checked="" type="checkbox"/> On
Allow File Attachments	On	<input type="checkbox"/> On
Use Document Setup for New Documents	On	<input type="checkbox"/> On
Allow Bulk Document Creation	Off	<input checked="" type="checkbox"/> On
Print Draft Status In Page Header	On	<input type="checkbox"/> On

Accept Cancel

# Document Template Section Properties

Special Programs | Search | Curriculum | Assessment | Communication | Reporting | Administration

Document Templates > School Age IEP [IEPGO] | Setup: Properties Security More...

IEP Cover Page | Output Format | HTML Format | Snippets | Testing Format | **Section Properties** | Fields | Field Properties | Section Actions | Easy Edit

Add Field... | **Section Security** | Print

Special Programs | Search | Curriculum | Assessment | Communication | Reporting | Administration

Document Templates > School Age IEP [IEPGO] | Setup: Properties Security More...

IEP Cover Page | Output Format | HTML Format | Snippets | Testing Format | **Section Properties** | Fields | Field P

Edit Section Behavior Options | Section Security | Print

**Section Name** IEP Cover Page  
**Prior Name(s)** none  
**Section Behavior**

- Include by Default in New Documents
- Add Remove Via Workflow Only
- Prevent Removal from Document
- Require This Section in Final Document
- Prevent Copying from This Section
- Always Regenerate When Not Final
- Always Omit When Generating PDF

(Configured Value: Off, Overridden by ADMIN, Overridden Value: Off)

**Section Status** Active  
**Custom?** No

Section Behavior Options	Default	Override Default?
Include by Default in New Documents	On	<input type="checkbox"/> On v
Prevent Removal from Document	On	<input type="checkbox"/> On v
Require This Section in Final Document	On	<input type="checkbox"/> On v
Prevent Copying from This Section	On	<input type="checkbox"/> On v
Preset as Completed in New Documents	Off	<input type="checkbox"/> Off v
Require Completion Before Review	Off	<input type="checkbox"/> Off v
Suppress Page Break Before This Section	Off	<input type="checkbox"/> Off v
Suppress Water Mark for This Section	Off	<input type="checkbox"/> Off v
Prevent Printing This Section	Off	<input type="checkbox"/> Off v
Skip Printing If Incomplete	Off	<input type="checkbox"/> Off v
Set Incomplete in New Revision Document	Off	<input type="checkbox"/> Off v
Always Omit When Generating PDF	Off	<input checked="" type="checkbox"/> Off v
Omit From Electronic Signature	Off	<input type="checkbox"/> Off v

OK Cancel



- ✓ 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 screenshot shows the top navigation bar of the Special Programs application. The breadcrumb trail is 'Document Templates > School Age IEP [IEPGO]'. The 'Setup' menu includes 'Properties', 'Security', and 'More...'. The main navigation menu includes 'Output Format', 'HTML Format', 'Snippets', 'Testing Format', 'Section Properties', 'Fields', 'Field Properties', 'Section Actions', and 'Easy Edit'. The 'Fields' tab is highlighted with a red box. Below the navigation menu are buttons for 'Add Field...', 'Section Security', and 'Print'.

The screenshot shows the 'Fields' tab active in the Special Programs application. The breadcrumb trail is 'Document Templates > School Age IEP [IEPGO]'. The 'Setup' menu includes 'Properties', 'Security', and 'More...'. The main navigation menu includes 'Output Format', 'HTML Format', 'Snippets', 'Testing Format', 'Section Properties', 'Fields', 'Field Properties', 'Section Actions', and 'Easy Edit'. The 'Fields' tab is highlighted with a red box. Below the navigation menu are buttons for 'Add Field...', 'Section Security', and 'Print'. The main content area displays a table titled 'Document Fields Linked To IEP Cover Page'.

	Document Field Name	Data Type (Length)	Data Flow / Default Text	Other Properties	Custom	Description
	Address	Character(255)	←Address	Read Only, Translatable, Audit Value Changes	-	Contains the student's address.



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

# Document Template: Fields

Special Programs

Document Templates > School Age IEP [IEPGO]

Setup: Properties Security More...

IEP Cover Page

Output Format HTML Format Snippets Testing Format Section Properties **Fields** Field Properties Section Actions Easy Edit

Add Field... Section Security Print

	Document Field Name	Data Type (Length)	Data Flow / Default Text	Other Properties	Custom	Description
	Address	Character(255)	←Address	Read Only, Translatable, Audit Value Changes	-	Contains the student's address.



Use the magnifier glass to modify fields within each section.

Special Programs

School Age IEP (IEP Cover Page) > Field: Address

Edit Field Behavior Options

**IEPGO Document Field Properties**

**Document Field Name** Address

**Description (Help Text)** Contains the student's address.

**Link to Profile Field** [Address](#)  
Data Flows From: Profile to Document

**Data Type** Character (255)

**Default Value**

**Quick Search Index?** No

**Other Properties**

- Read Only
- Translatable
- Audit Value Changes

**Custom Field?** No

Edit IEPGO Document Field Properties: Address

Document Field Properties	Default	Override Default?
Required	Off	<input type="checkbox"/> Off v
Audit Value Changes	<b>On</b>	<input type="checkbox"/> On v
Always Available For Macros	Off	<input type="checkbox"/> Off v
Apply Behavior Option When Revising	Off	<input type="checkbox"/> Off v

Accept Cancel

# Document Template: Fields Properties

Special Programs | Search | Curriculum | Assessment | Communication | Reporting | Administration

Document Templates > School Age IEP [IEPGO] | Setup: Properties Security More... | IEP Meeting Participants | Output Format | HTML Format | Snippets | Testing Format | Section Properties | Fields | **Field Properties** | Section Actions | Easy Edit

Special Programs | Search | Curriculum | Assessment | Communication | Reporting | Administration

Document Templates > School Age IEP [IEPGO] | Setup: Properties Security More... | IEP Meeting Participants | Output Format | HTML Format | Snippets | Testing Format | Section Properties | Fields | **Field Properties** | Section Actions | Easy Edit

Field Property: **Required** | Save | Cancel

- Required
- Audit Value Changes
- Allow Review Acknowledge Document
- Auto Notify To Review Acknowledge Document
- Auto Notify When Document Set To Review
- Auto Notify When Document Set To Final
- Always Available For Macros

Child's Name: Student

**Individualized Education Program (IEP)**  
School.District}@Profile.HomeSchool}@Profile.Location} {@Globals.ThisDistrict}

**IEP TEAM/SIGNATURES\***  
and placement. The student's parent(s), the student's special education teacher and a representative from the Local Education Agency are required members of

{parent1SignT} {studentSignTxt}{^SAIEPPart}

# Review and Acknowledge Documents Feature

Special Programs

Document Templates > School Age IEP > Template Security

Security Rights | Other Security Options

Security Rights: School Age IEP

Security Group	Document-Wide View/Edit Rights								Status Change Rights				Print	Review Acknowledge	Submit to DocuSign	Attach Files	Edit Files Attached by Others	Attach Files to Final Documents	Edit Public Statement Banks
	View Final Only	Create	Edit Draft	Edit Review	Edit Final	Translate	Delete	Set Draft	Set Review	Set Final	Set Active								
01	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin rev_acknowledge	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Building Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Ed Training	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dara's Group	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DocuSign Senders	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FACILITATORS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General Ed Teacher	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 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

My Home Page > 504 IEP Estefanie Aadams (201400040) > Documents > Final: \*Active\* School Age IEP (Progress Monitoring Practice, 2022-23)

← → IEP Cover Page ▾

Navigate To... ▾ More... ▾

Child's Name: Estefanie Aadams

IEP Team Meeting Date:

IEP Implementation Date (P

Anticipated Duration of Ser

- Submit Document for Digital Signature
- Send Message With Document
- Review and Acknowledge**
- Compare With Previous Document
- Inspect Document Values
- View Past Document

School Age Individualized Education Program Application

Estefanie Aadams (201400040) > Documents > Final School Age IEP > Review and Acknowledge

Final School Age IEP for Estefanie Aadams (201400040): Progress Monitoring Practice

User(s) who have acknowledged they have reviewed this document:  
None

**To acknowledge you have reviewed this document, review the entire document below and then acknowledge that at the bottom.**

Acknowledgements not yet received:  
None

I have reviewed this entire document and now acknowledge that by providing my password, known only to me.

Password:

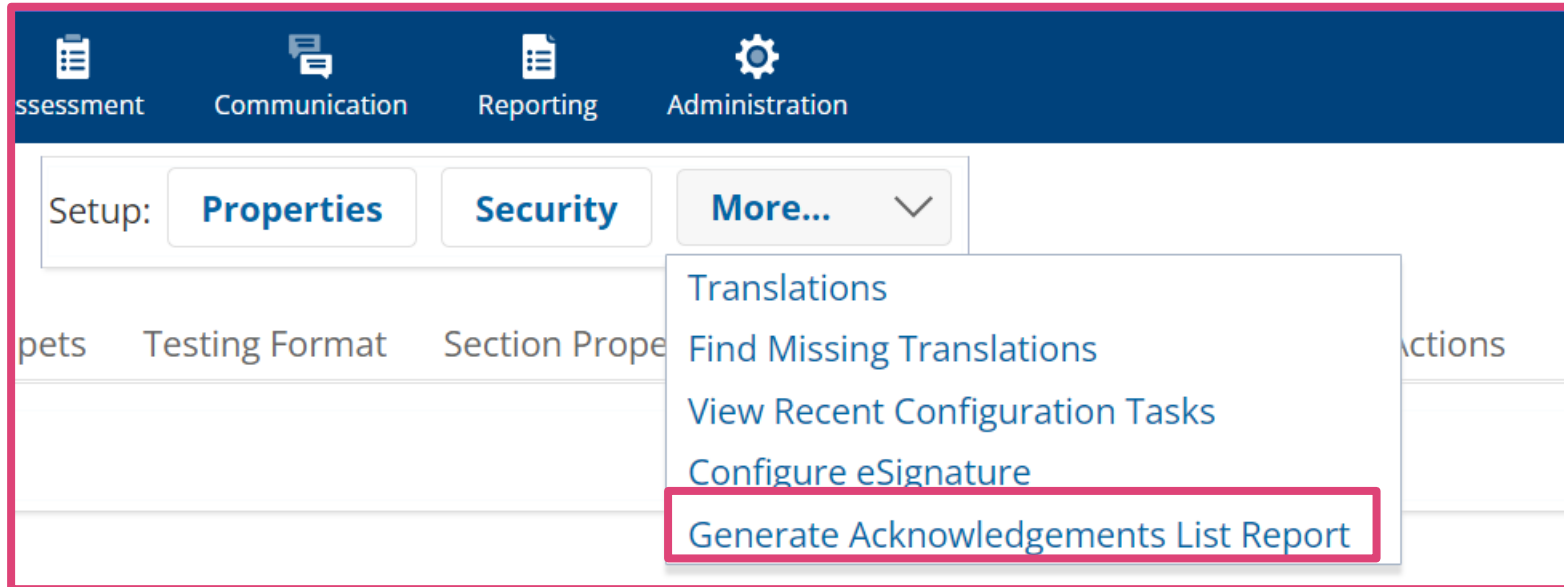
**Acknowledge**



**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

The screenshot shows the PowerSchool Special Programs interface. At the top, there is a navigation bar with icons for Search, Curriculum, Assessment, Communication, Reporting, and Administration. Below this, the breadcrumb path is 'Document Templates > School Age IEP [IEPGO]'. A 'Setup:' menu is visible with options for 'Properties', 'Security', and 'More...'. The main content area shows 'IEP Cover Page' with a dropdown arrow. Below this, there is a row of tabs: 'Output Format' (which is underlined), 'HTML Format', 'Snippets', 'Testing Format', 'Section Properties', 'Fields', 'Field Properties', 'Section Actions', and 'Easy Edit' (which is highlighted with a red box). At the bottom of the interface, there are three buttons: 'Add Field...' with a dropdown arrow, 'Section Security', and 'Print'.

- 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

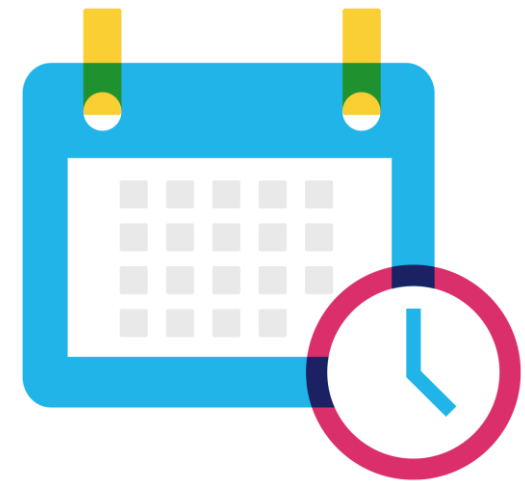
**October 18:** Special Programs Office Hours

**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



# Resources: General

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

# Resources: General

Special Programs Release Notes	Special Programs Release Notes	Special Programs PowerUps
<a href="#">Platform Release 22.11.0.0</a> Release date: December 16, 2022	<a href="#">Platform Release 23.6.0.0</a> Release Date June 16, 2023	<a href="#">Special Programs PowerUps 2022 Series</a>
<a href="#">Platform Release 22.11.1.0</a> Release date: January 27, 2023	<a href="#">Platform Release 23.6.1.0</a> Release Date: July 14, 2023	
<a href="#">Platform Release: 22.11.2.0</a> Release date: February 17, 2023		<b>Office Hours</b>
<a href="#">Platform Release: 22.11.3.0</a> Release date: March 17, 2023		<a href="#">Office Hours 2020 Series</a>
<a href="#">Platform Release: 22.11.4.0</a> Release Date: April 21, 2023		<a href="#">Office Hours 2020 Series</a>
<a href="#">Platform Release: 22.11.5.0</a> Release Date: May 19, 2023		<a href="#">Office Hours 2020 Series</a>

# Resources: Reporting

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

# Resources: Digital Signature

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

# Resources: Language Translations

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



# 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
<a href="#"><u>How-To: Special Programs/PS SIS Integrations 101</u></a>	<a href="#"><u>How-To: Special Programs/PS SIS Integrations 107</u></a>	<a href="#"><u>How-To: Special Programs / PS SIS Integration 113</u></a>	<a href="#"><u>PowerSchool Special Programs - Aug 27, 2020</u></a>	<a href="#"><u>Integrations- March 2022</u></a>	<a href="#"><u>PowerSchool SIS Integration</u></a>
<a href="#"><u>How-To: Special Programs/PS SIS Integrations 102</u></a>	<a href="#"><u>How-To: Special Programs/PS SIS Integrations 108</u></a>		<a href="#"><u>Integrations and Dataflow - Part 1 March 31, 2022</u></a>		<a href="#"><u>Schoology Integration</u></a>
<a href="#"><u>How-To: Special Programs/PS SIS Integrations 103</u></a>	<a href="#"><u>How-To: Special Programs/PS SIS Integrations 109</u></a>		<a href="#"><u>Integration and Dataflow - Part 2 - April 28, 2022</u></a>		
<a href="#"><u>How-To: Special Programs/PS SIS Integrations 104</u></a>	<a href="#"><u>How-To: Special Programs/PS SIS Integrations 110</u></a>				
<a href="#"><u>How-To: Special Programs/PS SIS Integrations 105</u></a>	<a href="#"><u>How-To: Special Programs/PS SIS Integrations 111</u></a>				
<a href="#"><u>How-To: Special Programs/PS SIS Integrations 106</u></a>	<a href="#"><u>How-To: Special Programs/PS SIS Integrations 112</u></a>				



# Resources: End of Year Rollover

Previous Office Hours Recordings	Previous PowerUps Recordings	In-Platform User Guide
<a href="#"><u>Office Hours Recording: End of Year Rollover, and Ideas Portal - May 2022</u></a>	<a href="#"><u>PowerUps Recording: End of Year Rollover - May 2022</u></a>	<a href="#"><u>End-of-Year Rollover</u></a>

# Resources: Document Templates

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



PowerSchool

# Need more training? Get involved with Customer Education!



**PowerSchool University** | [www.powerschooluniversity.com](http://www.powerschooluniversity.com)

Attend onsite and online training events for hands-on professional development covering multiple PowerSchool solutions led by certified PowerSchool Trainers



**Exclusive Training Events** | [training@powerschool.com](mailto:training@powerschool.com)

Exclusive events can be scheduled at your location and offered only to staff in your District.



**Professional Development Plus** | [pdplus@powerschool.com](mailto:pdplus@powerschool.com)

On-demand training library featuring engaging formats, personalized learning, and progress monitoring.



**Certifications** | [training@powerschool.com](mailto:training@powerschool.com)

We offer a variety of train-the-trainer, end user, and role-based certifications so you can become a certified PowerSchool expert.



**Proven Practices** | [provenpractices@powerschool.com](mailto:provenpractices@powerschool.com)

PowerSchool experts guide your staff development to prepare your teachers and administrators to achieve success and drive improvement.



# 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](https://powerschool.com/champions) and SIGN UP or email [champions@powerschool.com](mailto:champions@powerschool.com) if you have questions!



 PowerSchool

**CHAMPIONS**

Thank you for your Partnership!

