Enrollment: Communication Templates

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Agenda

1	Intro to Communication Templates
2	Best Practices
3	Manual vs Automatic
4	How To
5	Tips & Tricks
6	Resources
7	Q&A
8	Upcoming Events & Webinars

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Intro into Communication Templates

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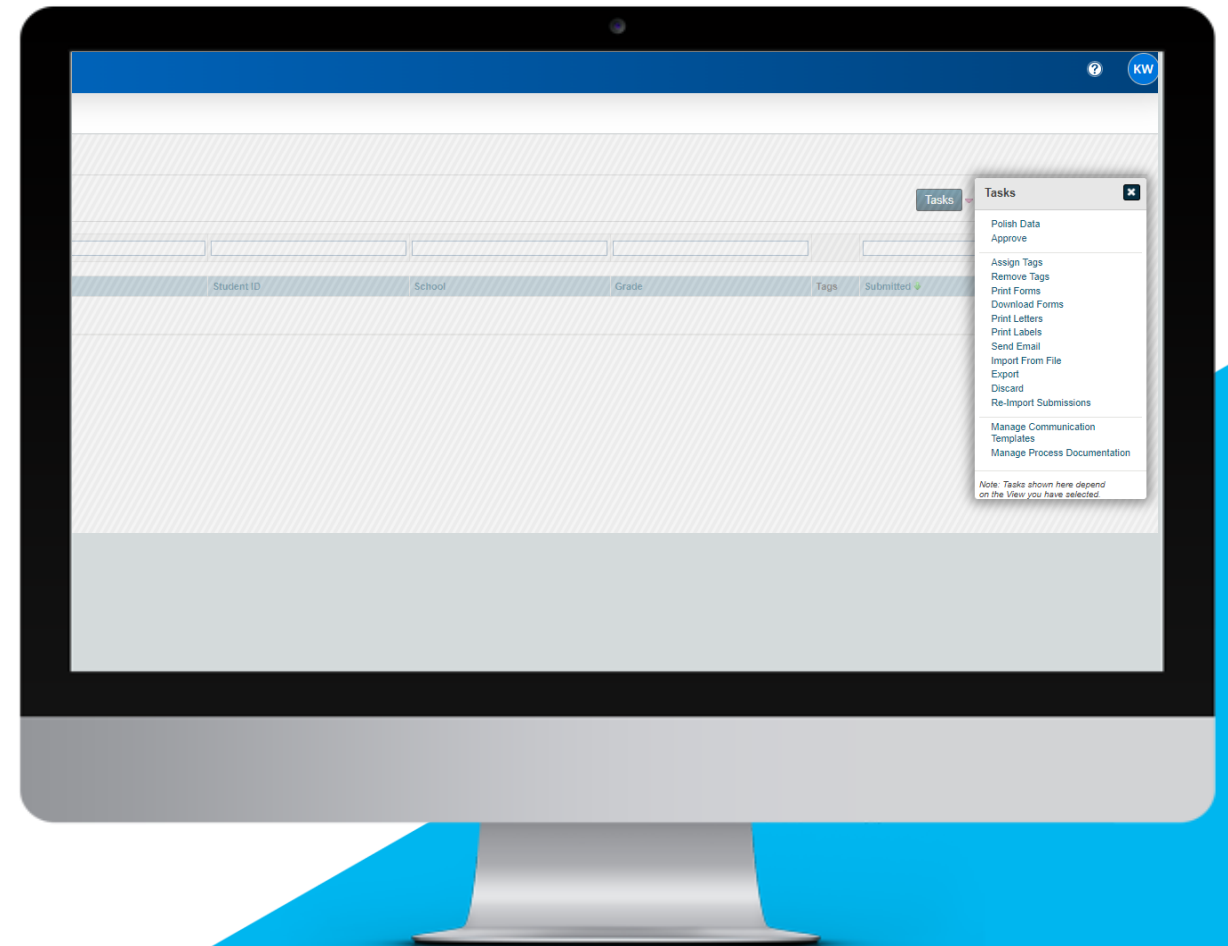# Types of Communication Templates

Email

Letter

Label

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How to Access

Pre-Submission Workspace
Roster Workspace
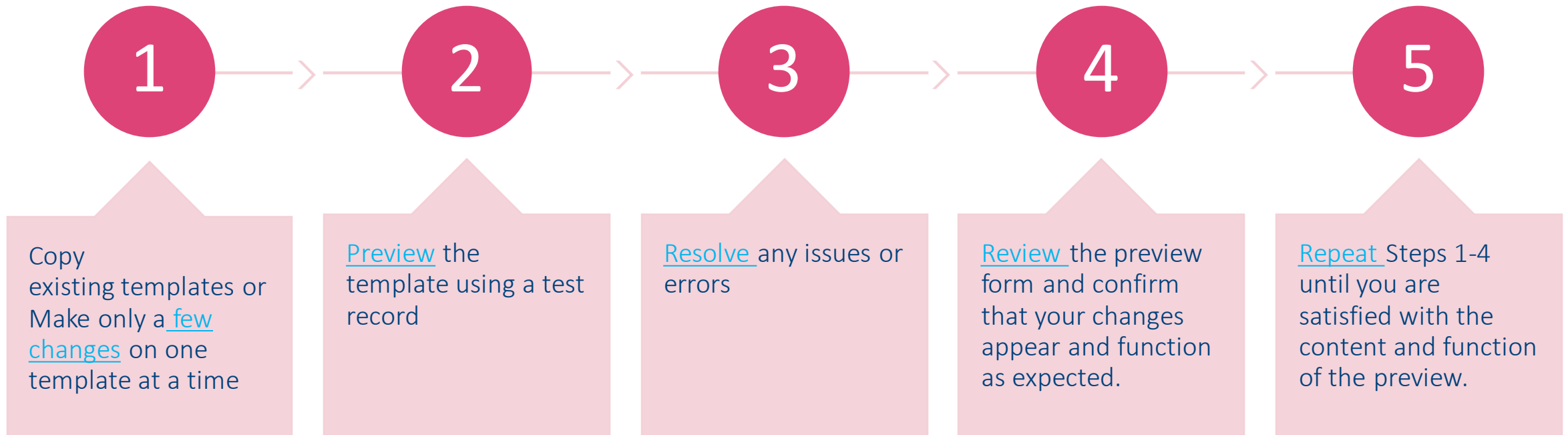Submission Workspace

Student Data > Choose Form > Select Workspace you want > Tasks > Manage Communication Template

Best Practices

Communication Template Best Practices

1 → **2** → **3** → **4** → **5**

Copy existing templates or Make only a few changes on one template at a time

Preview the template using a test record

Resolve any issues or errors

Review the preview form and confirm that your changes appear and function as expected.

Repeat Steps 1-4 until you are satisfied with the content and function of the preview.

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Manual Vs. Automatic

Manual Vs. Automatic Set Up

Manual

- Required to be sent by admins
- Tasks > Send Email > Choose Template > Selected Only/All Found

Automatic

- No Manual Work required
- Who to send to
- Choose frequency
- Start/End date
- Choose time
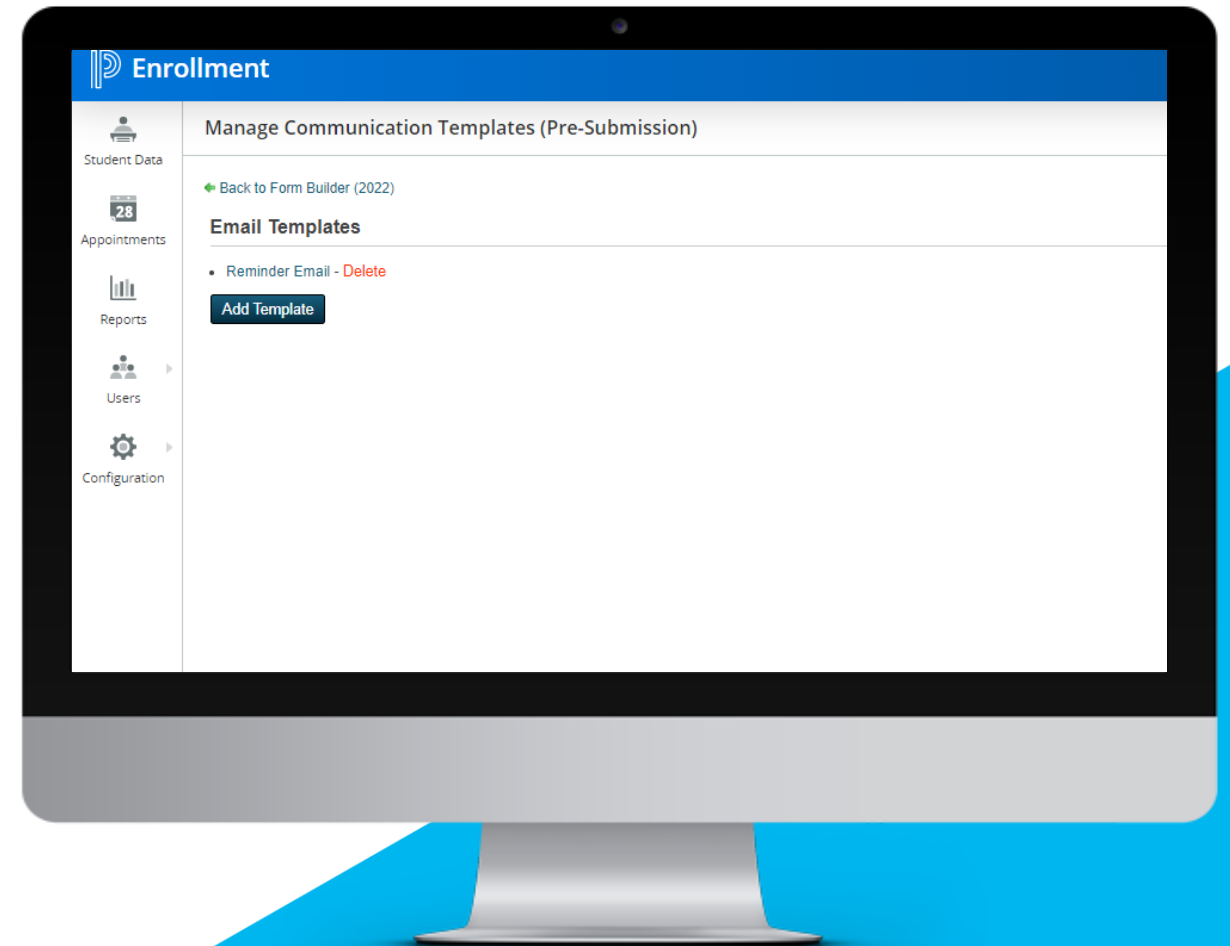- Which email fields to send to

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How To

Pre-Submission Template

Only for Restricted Forms

Allows districts to reach those that have never been to the district before, but have started the form

Student Data > Choose Form > Pre-Submission Workspace > Tasks > Manage Communication Templates

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Roster Workspace Templates *Only for Private Forms*

Notification Template
Reminder Email

Student Data > Choose Form > Roster Workspace > Tasks >
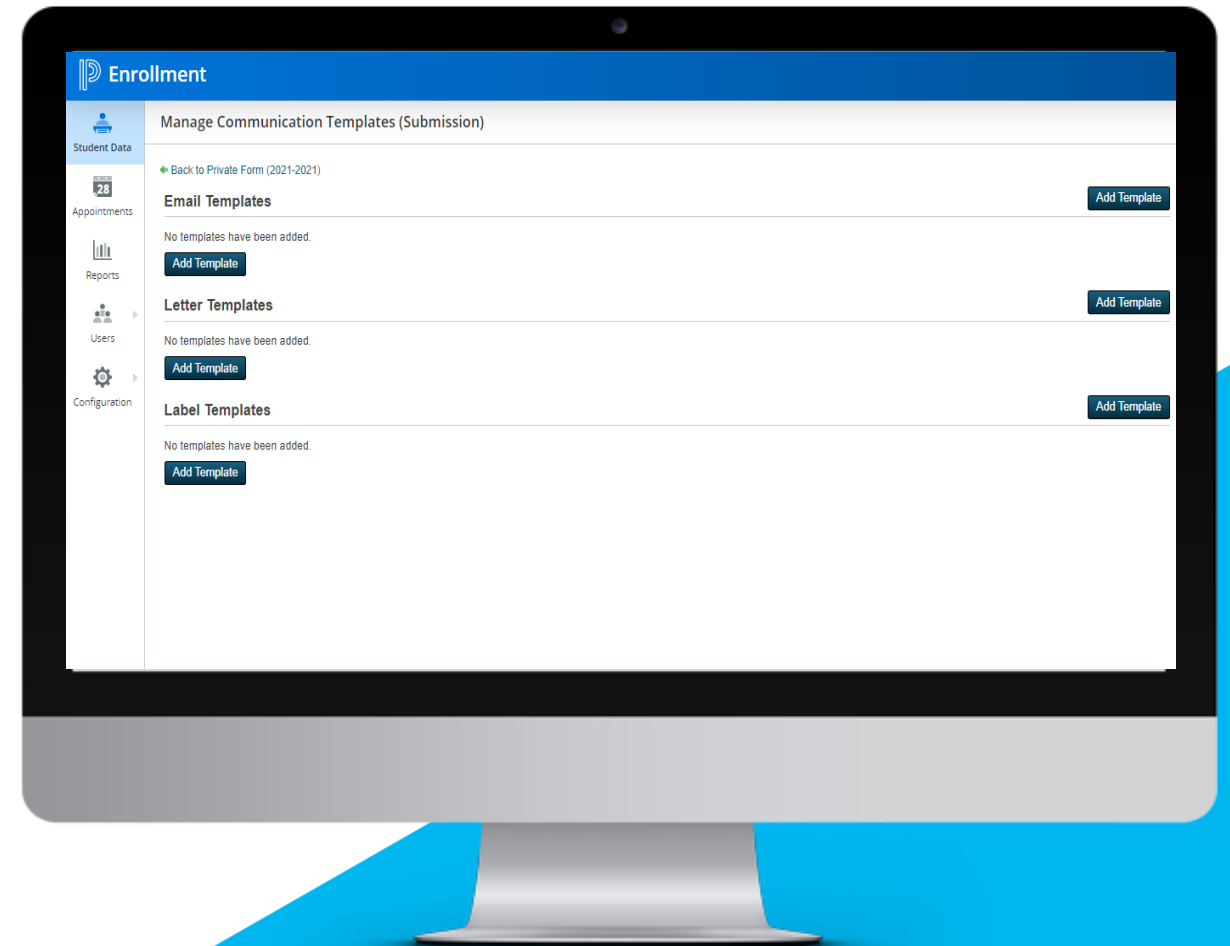Manage Communication Templates
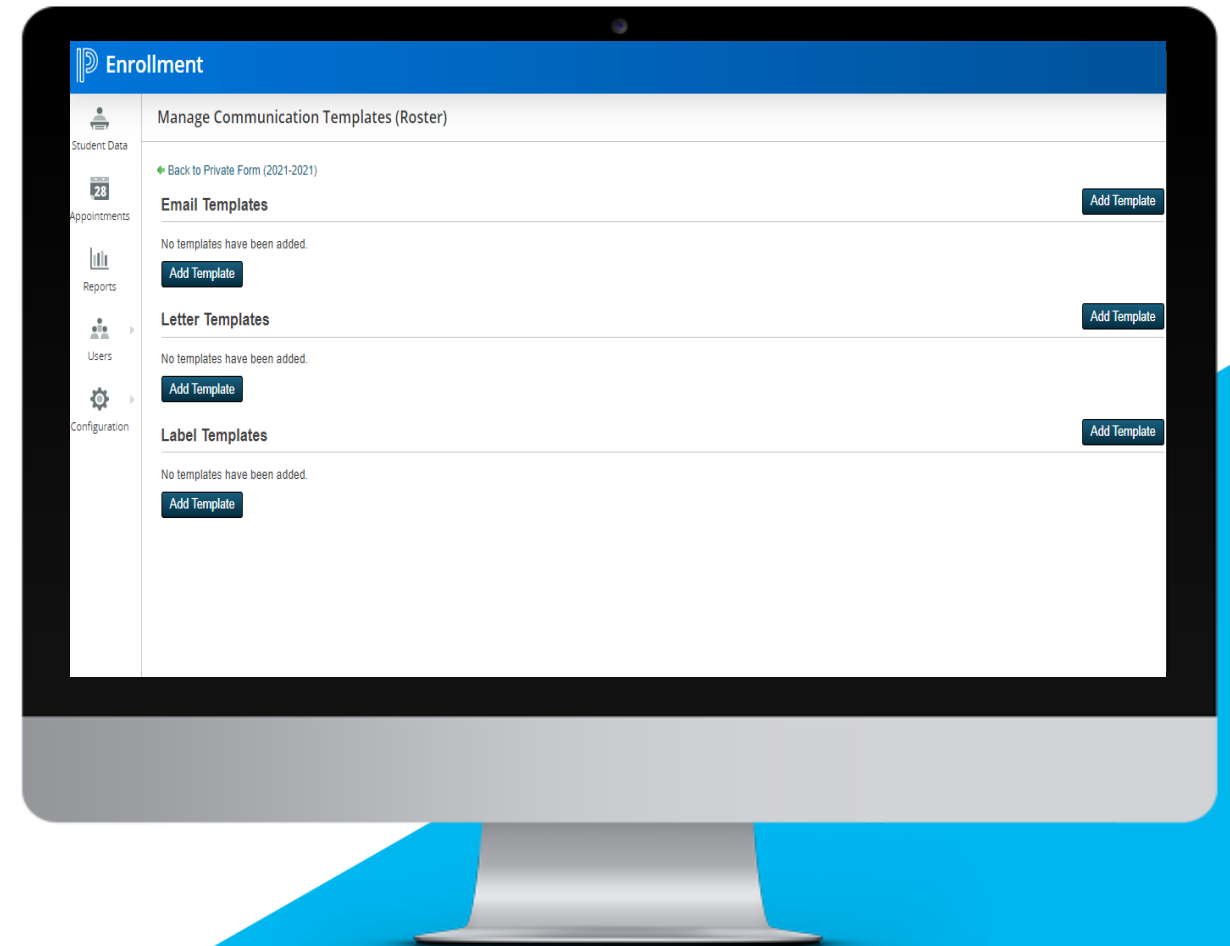
Submission Workspace Templates

Allows districts to communicate with families after forms have been submitted

Follow Up
Status

Student Data > Choose Form >
Submission Workspace > Tasks >
Manage Communication Templates

Tips and Tricks

Tips and Tricks

Multiple Languages

Adding Images

Rules/Filters

Using Tokens

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Tips and Tricks

Multiple
Languages

1
Template

Multiple
Templates

Tips and Tricks

Adding Images

Step 1: Add Image to Admin Portal

- Configuration > Files > Upload File

Step 2: Copy File Link

- Click 3 Dots > Copy Link > Highlight Link > Copy

Step 3: Add Link to Template

- Student Data > Choose Form > Choose Workspace > Manage Communication Template > Edit Body > Right Click > Edit Add Image

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Tips and Tricks

Rules/Filters

Ability to have auto emails only send to those that meet the criteria of the rule

Configuration > General > Student Data > Choose Form > Create Rule

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Status Value

Status	Value
Imported/Added	0
Notified/Not Started	1
Started	2
Submitted	3
Pending Approval	1
Approved	2
Delivered	

Use PROP: Status field when creating the rule

Use PROP: Delivery History field when creating the rule. Typically, the rule would be delivery history is/is not blank

Tips and Tricks

Using Tokens

Allows you to pull in different fields, both form and non-form fields to customize templates for that record

Student Data > Choose Form > Submission Workspace > Tasks > Manage Communication Templates > Choose Template > Edit > Insert Token

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Resources

Help Guide & Community

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Resources

Help Guide	Community
Manage Communication Templates	Notifying Records & Sending Communication
Notify Families	Intermediate Workspace Tools
Tokens	Property Fields (PROP Fields)
	Tokens
	Print Labels

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Upcoming Events & Webinars

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Upcoming Events

Enrollment Office Hours
Wednesdays @ 11am ET / 8am PT

https://help.powerschool.com/t5/Enrollment-Office-Hours-and/Register-Now-for-PowerSchool-Enrollment-Ask-the-Experts-2023/ta-p/453326   *Recordings found here

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Upcoming Webinars

Print Templates – Join us in creating the 3 different types of print templates. We will walk you through creating your own as well as adjusting current templates.
June 6th

Permissions & Profiles – This session will give you a crash course into managing your district's permissions and profiles. We will cover adding/adjusting profiles as well as adding new staff to forms.
July 18th

Year-Round Update – During this session, we will cover the basics of what is Year-Round Update including how to use it, who can use it and when it should be used.
August 15th

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