



# PowerUPs

## Enrollment: Permissions & Profiles

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**Date: 07/18/2023**



# Agenda

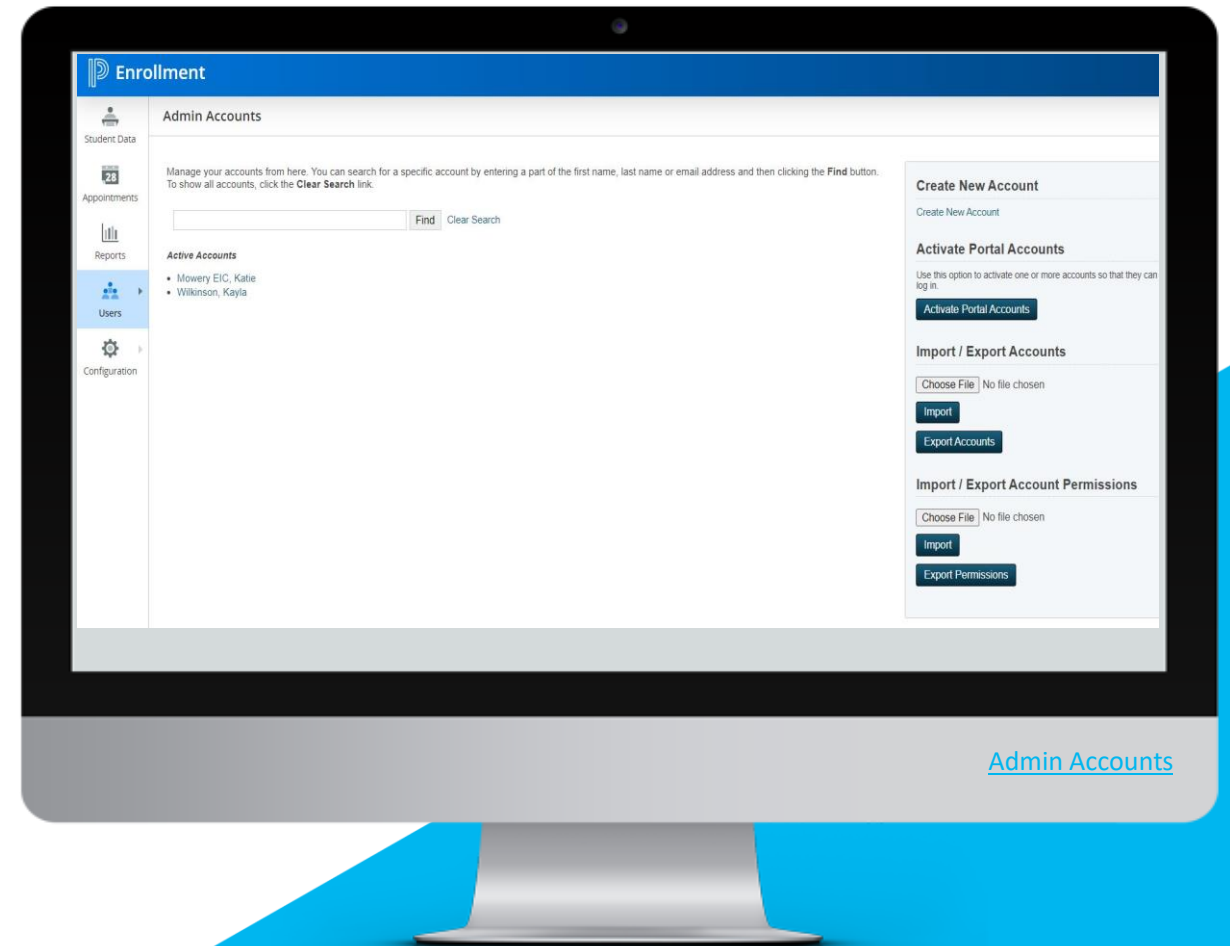
1	Where to Access Accounts & Permissions
2	Admin Accounts
3	Permissions
4	How to
5	Resources
6	Q&A
7	Upcoming Events & Webinars



# Where to Access Admin Accounts & Permissions

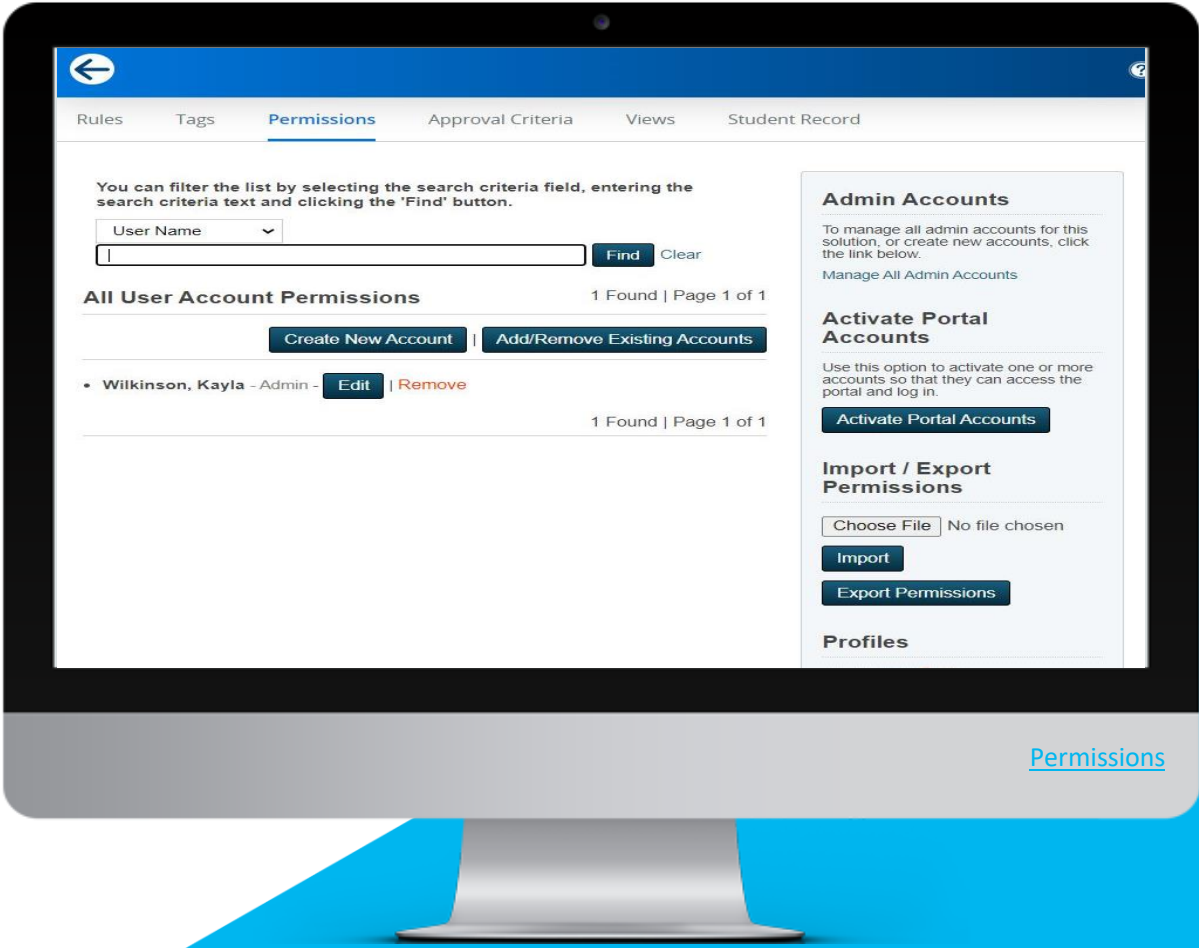
# Admin Accounts

Users > Admin Accounts



# Permissions

Configuration > General > Choose Form > Permissions





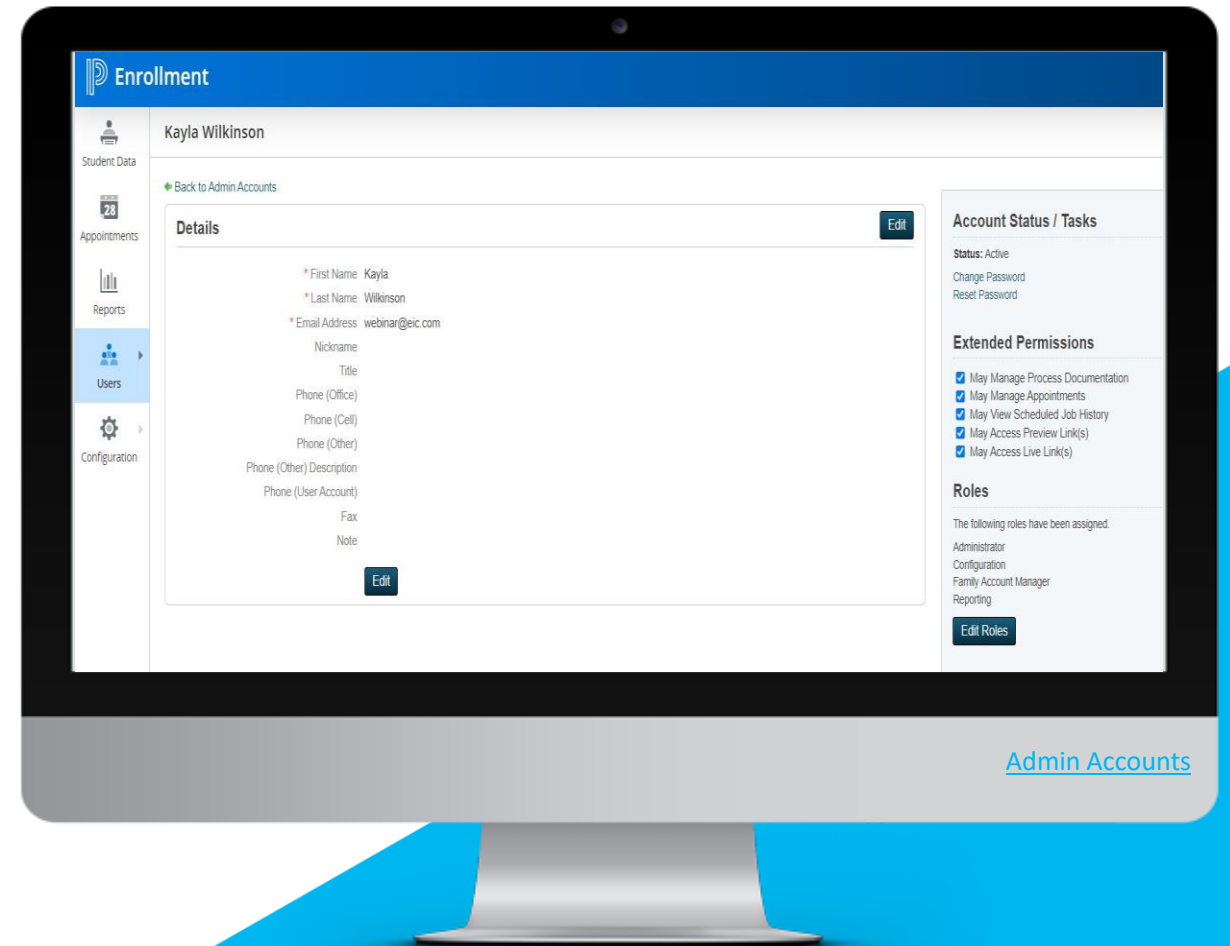
# Admin Accounts

# Admin Accounts

Review Accounts	<ul style="list-style-type: none"><li>• Active, Pending, Disabled</li></ul>
Create New Account	<ul style="list-style-type: none"><li>• Only gives access to the portal not the forms</li></ul>
Activate Portal Accounts	<ul style="list-style-type: none"><li>• Sends instructions to users selected</li></ul>
Import/Export Accounts	<ul style="list-style-type: none"><li>• Details Sections</li></ul>
Import/Export Account Permissions	<ul style="list-style-type: none"><li>• Permissions Section</li></ul>

# Account Details

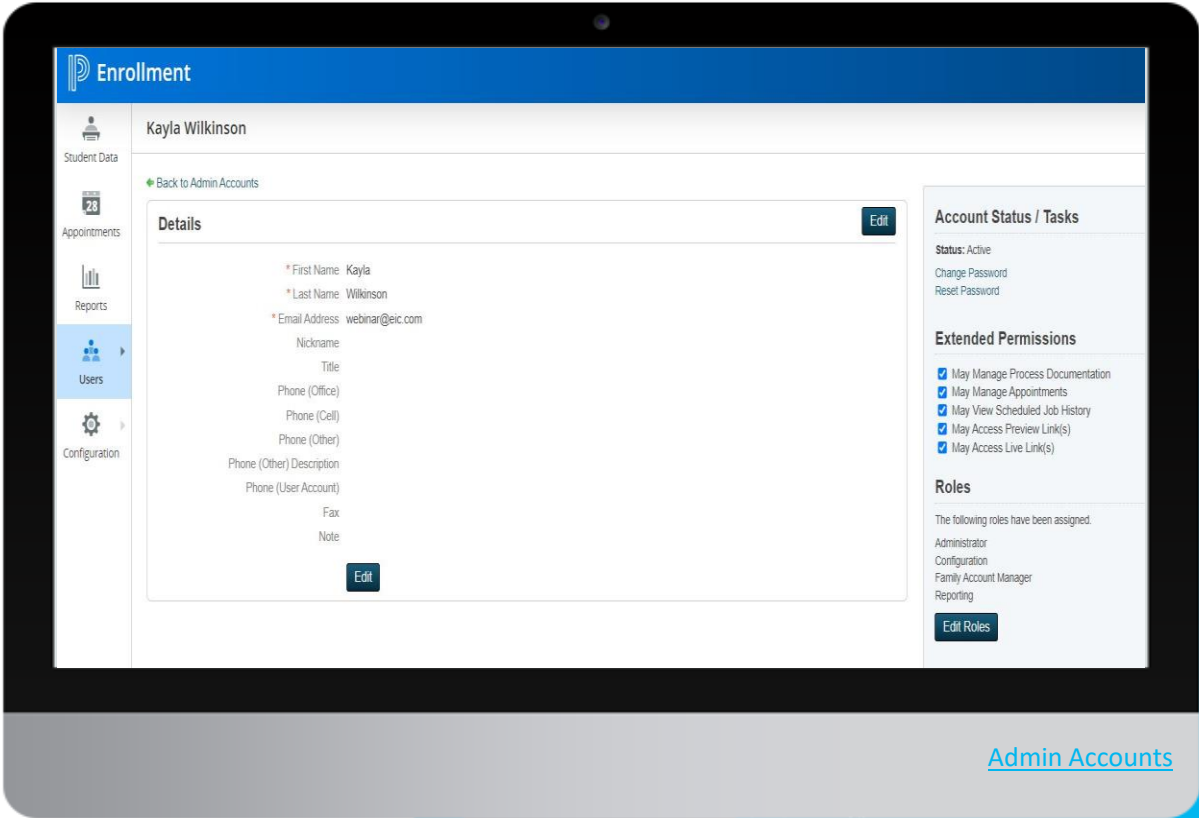
- General Details
  - Name
  - Email
  - Nickname
  - Title
  - Phone Numbers
  - Fax
  - Notes





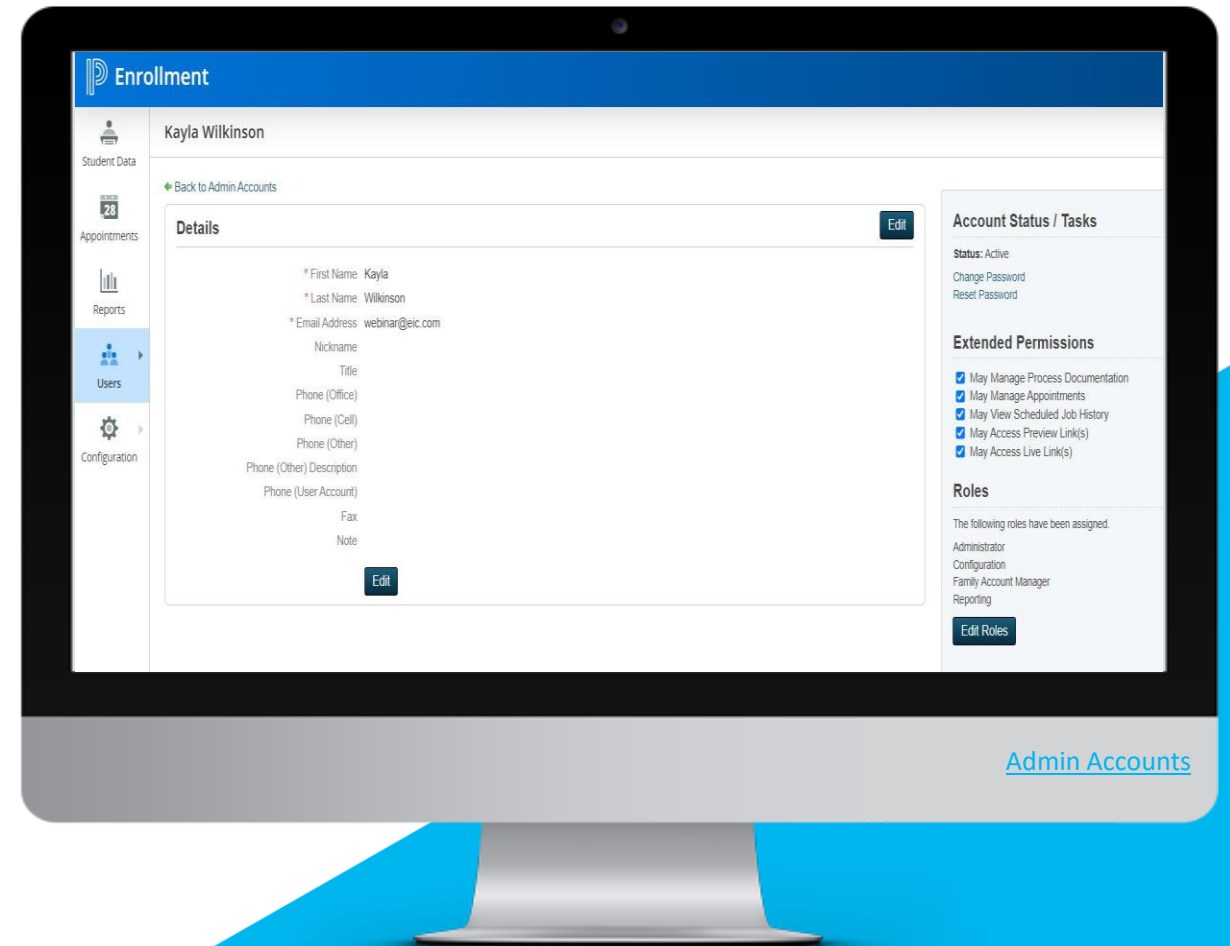
# Account Details

- Change Password
- Reset Password
- Disable Accounts



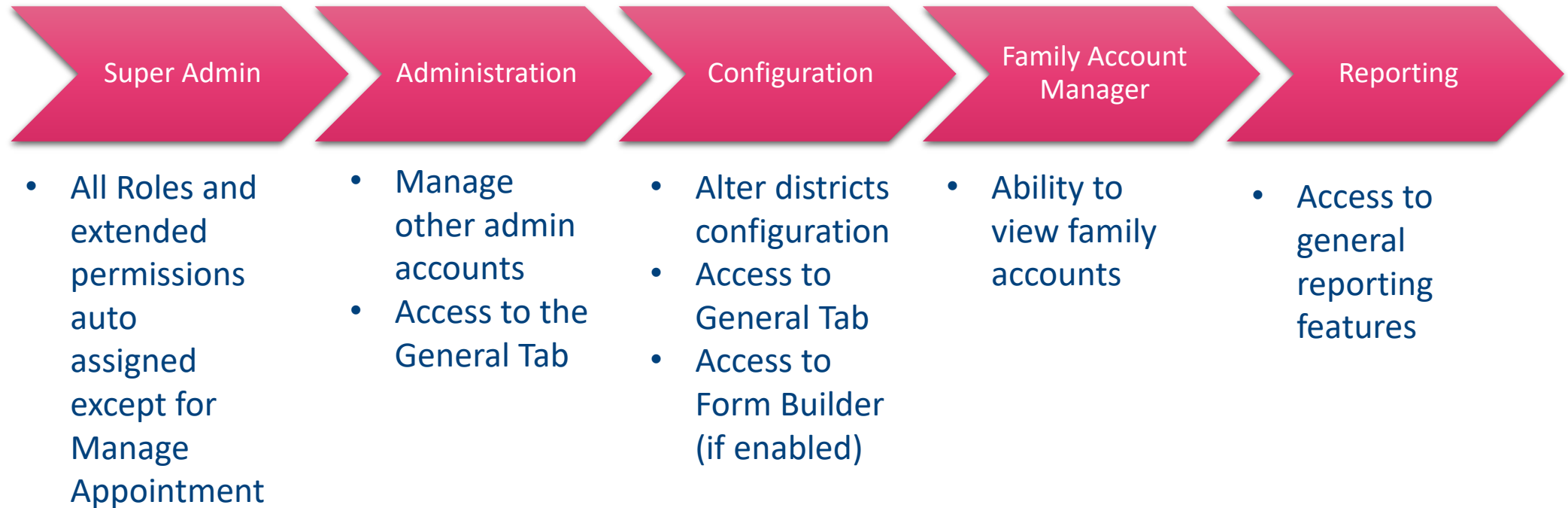
# Account Details

- Extended Permissions
  - Manage Process Documentation
  - Manage Appointments
  - View Scheduled Job History
  - Access Preview Link(s)
  - Access Live Link(s)



# Admin Accounts Roles

\*Only PS Can Assign





# How To

# How To

01

Creating a New Admin Account

02

Adding/Removing Admin Accounts to a form

03

Creating a New Profile



# Permissions & Profiles

# Permissions

## Search Accounts

- By Username, Profile Name, Workspace Filter

## Create New Account

- Need to go to Admin Accounts to add Role/Additional Permissions

## Add/Remove Existing Accounts

- Give/Takeaway the ability to access the form

## Edit Account Permissions

- Edit/Assign a profile/permission rules to admins account for that form

# Permissions

## Manage All Admin Accounts

- Takes you to the general account page

## Activate Portal Accounts

- Will send email to non-active account with instructions to activate

## Import/Export Permissions

- Show admins as well as their profiles/rules

## Profiles

- Set of permissions you can assigned to admins

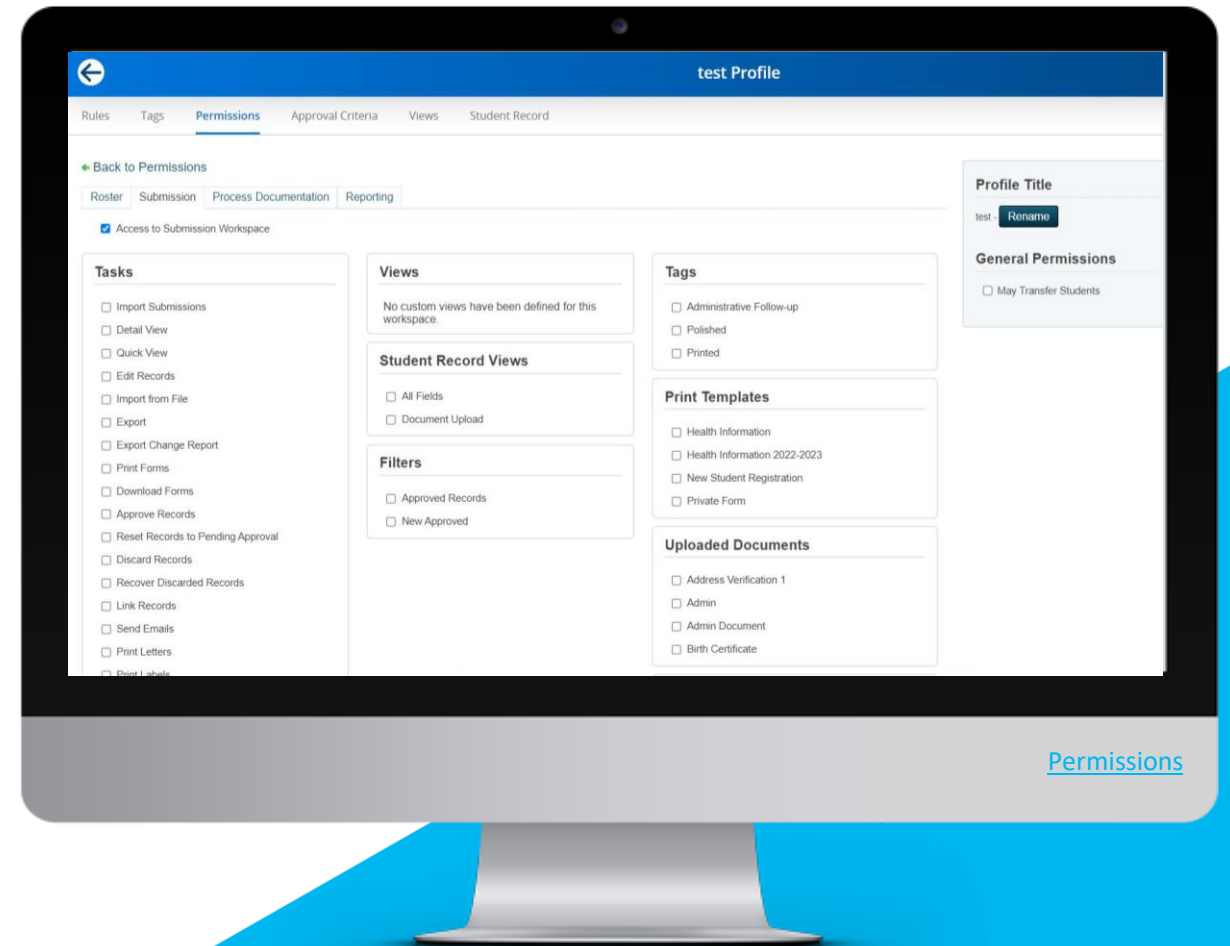
## Import/Export Profiles

- Ability to see all profiles and what is included/not included in each



# Profiles

- Permission checkboxes are unique for each profile and configured based on what each group needs
- New Student/Restricted forms will include the following tabs
  - Pre-Submission (optional)
  - Submission
  - Process Documentation
  - Reporting
- Returning Student/Private forms will include the following tabs
  - Roster
  - Submission
  - Process Documentation
  - Reporting





# Admin Notifications

# Admin Notifications Options

\*Only PS Specialists can set these up

You can have emails go to specific staff based on these 3 actions



Submission Notification

When student records are submitted by parents

Approval Notifications

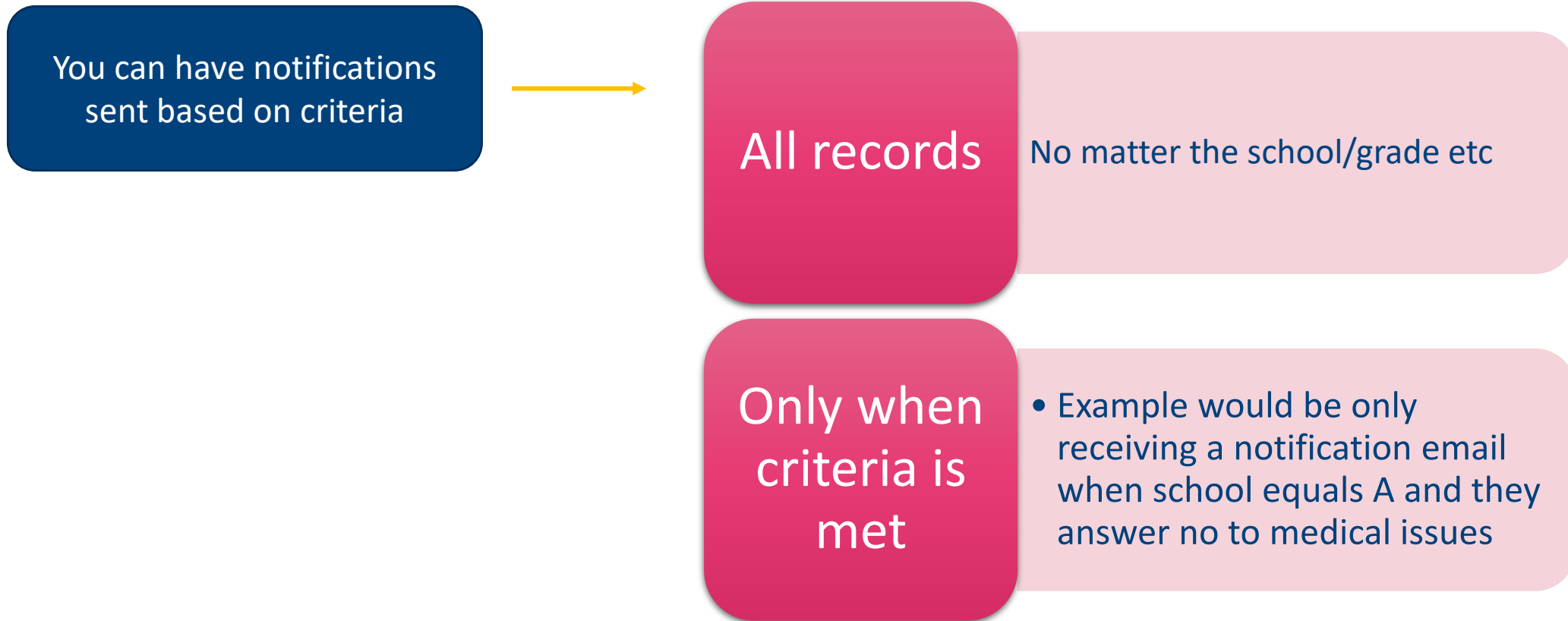
When student records are approved in the workspace

Delivery Notification

When student records are delivered from Enrollment to SIS

# Admin Notifications Logic

\*Only PS Specialists can set these up



# How to Submit a Request to Support

\*Only PS Specialists can set these up

“I would like to set up the following admin notifications;

- Staff A, B and C receive a submission notification for when a record is submitted for school A
- Staff D and E receive an approval notification when a record is approved and say yes to medical issues
- Staff F, G, and H receive a delivery notification for all records”
- Just let PS support know what you want included in each notification email
  - You can include info from the submitted record (see example below)

## Example Submission Notification Email

\*is\*Action:Title\*is\* has been submitted  
for \*is\*FamilyMember:FirstName\*is\* \*is\*FamilyMember:LastNam  
e\*is\* on \*is\*Submission:DateSubmitted\*is\*

Grade: \*is\*stu\_EnrollGrade\*is\*

School: \*is\*stu\_School\*is\*



# Resources

Help Guide & Community

# Resources

Help Guide	Community
<a href="#">Admin Accounts</a>	<a href="#">Self-Service Capability Matrix</a>
<a href="#">Permissions</a>	
<a href="#">Profiles</a>	
<a href="#">Rules - Permission</a>	

# Upcoming Events & Webinars



# 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

# Upcoming Webinars

<https://help.powerschool.com/t5/Enrollment-Office-Hours-and/Register-Now-for-Enrollment-PowerUps-2023/ta-p/453567>

**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

**Add Ons** – Want to learn more about some of the additional tools that Enrollment has? Come join me in learning about some of the add-ons which include payments, appointment management, school recs, school locator, etc.

September 19<sup>th</sup>

**School Choice**– During this session, we will cover what is School Choice and the general process when using it. We will also cover some best practices, tips & tricks etc.

October 3<sup>rd</sup>



# Questions

