

# Welcome to the Unified Talent PowerSchool PowerUp!



April 2023

# Today's Agenda

- Welcome
- End of Year Assistance Options
  - Community
  - Strategic Solutions Consulting
  - Office Hours
  - EICs
- Professional Learning New PD Administration
- Breakout Rooms



# PowerSchool Community

P **PowerSchool Community**

[Product Support](#)
[Product Roadmap](#)
[Services](#)
[Contact Support](#)
[Our Community](#)
[Events Hub](#)

[Learn about events](#)

[How to Subscribe](#)

[Ask our Community](#)

< >
Today
April 2023
Month Week Day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28 9:00am Navia... 10:30am Sup... 11:00am Navi... 12:00pm Offi...	29 8:00am Ask t... 9:00am Busin... 10:00am Beh... 10:00am Offic... +2 more	30 12:00pm Offi...	31	1
2	3	4 10:30am Sup...	5 8:00am Ask t...	6	7	8
9	10	11	12	13	14	15

(PDT)  
in: [PowerSchool SIS Events](#)

**Unified Talent PowerUps**  
Tuesday, April 11, 2023, 09:00 AM (PDT)  
in: [PowerUp Events](#)

**Special Programs PowerUps**  
Tuesday, April 11, 2023, 10:00 AM (PDT)  
in: [PowerUp Events](#)

**Support Office Hours**  
Tuesday, April 11, 2023, 10:30 AM (PDT)  
in: [PowerSchool eSchoolPlus SIS](#)

**Unified Talent PowerUps**  
Wednesday, April 12, 2023, 07:00 AM (PDT)  
in: [PowerUp Events](#)

[Ask the Experts](#)

# Strategic Solutions Consulting

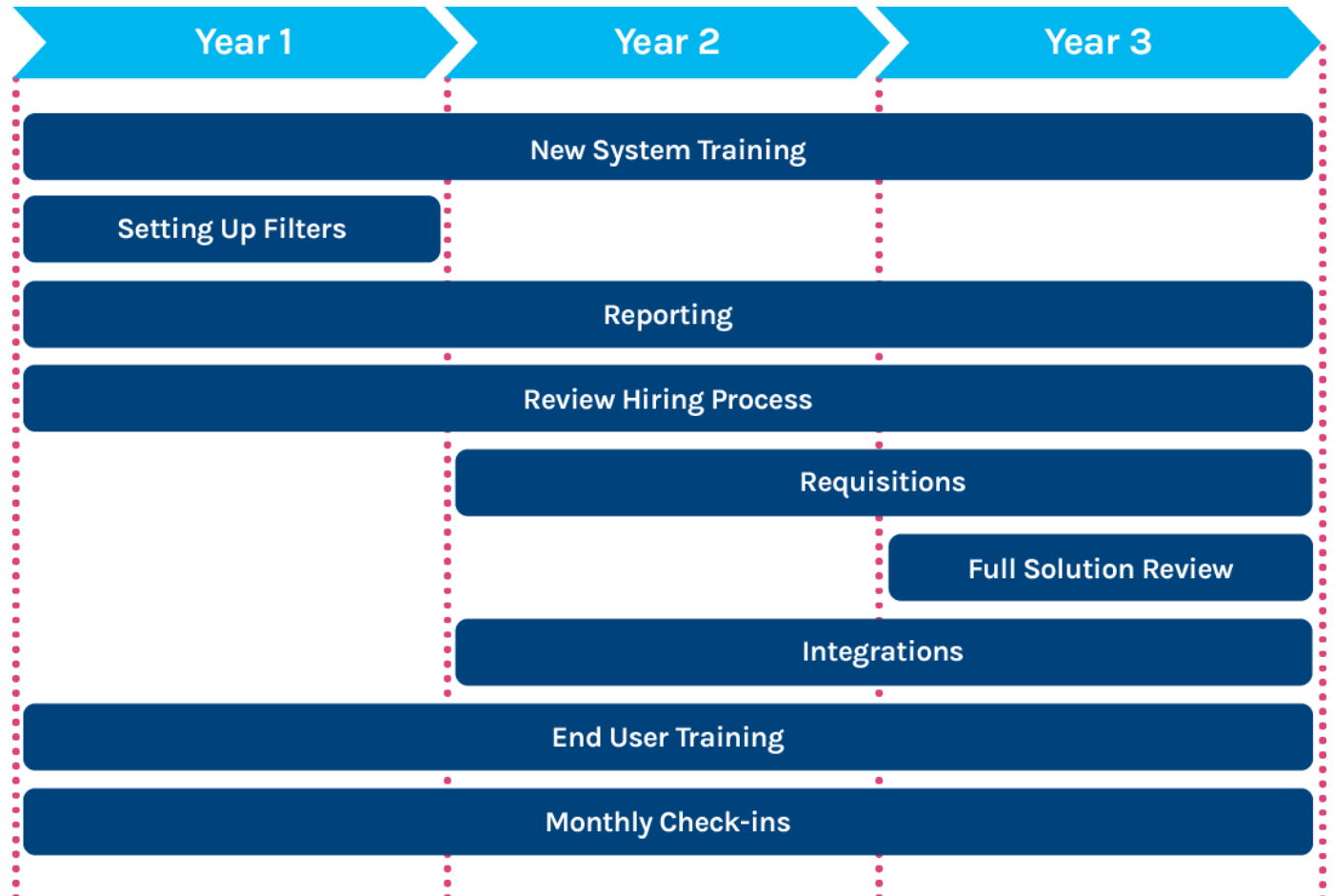


## Unified Talent™ Applicant Tracking

Utilize **Applicant Tracking** consulting services to gain timely answers to your most pressing needs.

The Strategic Solutions Consulting team consists of subject matter experts in a variety of topics, including **system admin tools, platform support, and custom solutions**. These are some topics we can consult with you on using the hours included in your consulting packages.

To learn more, please email us at [ServicesSolutions@PowerSchool.com](mailto:ServicesSolutions@PowerSchool.com).



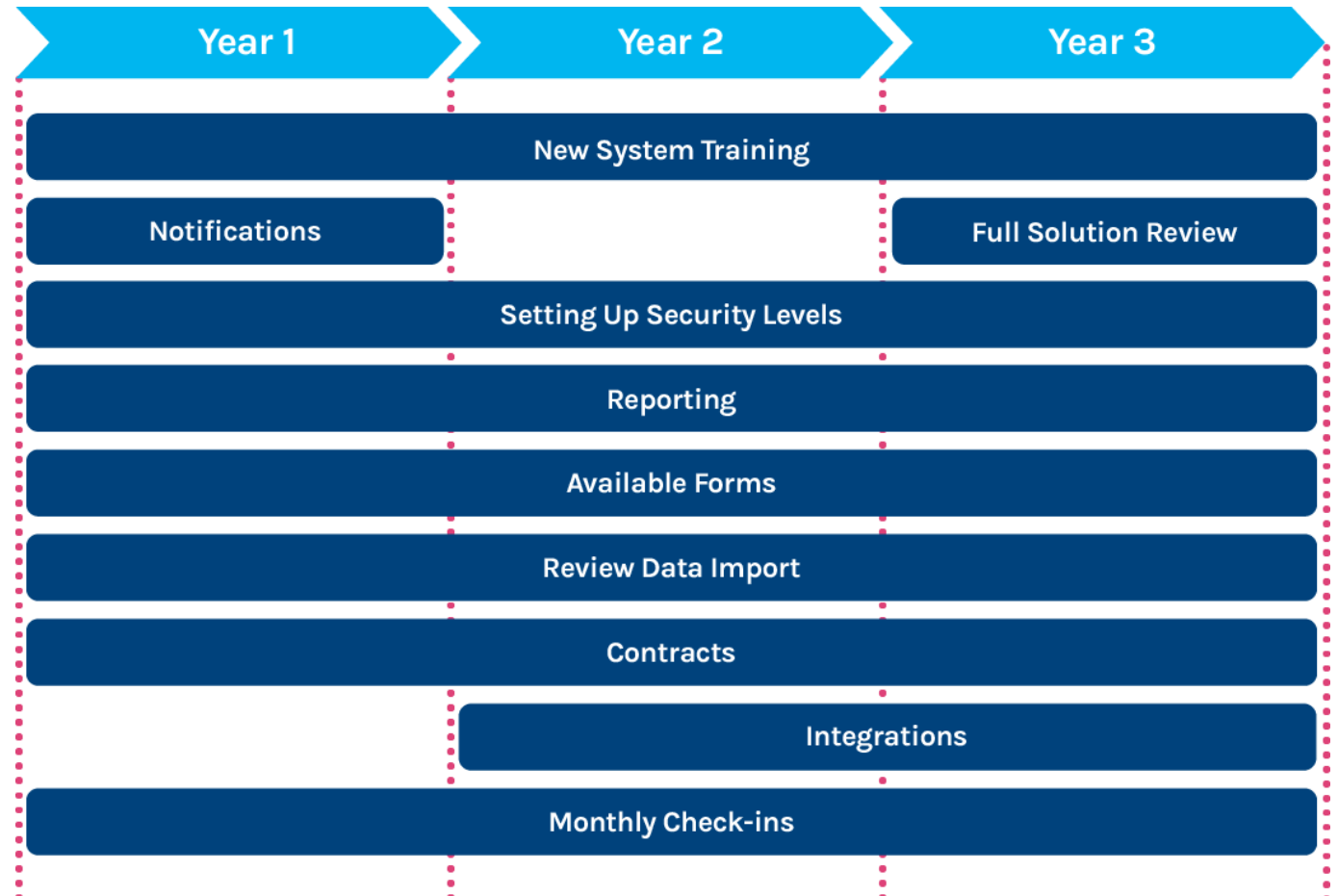
# Strategic Solutions Consulting



Utilize **Records** consulting services to gain timely answers to your most pressing needs.

The Strategic Solutions Consulting team consists of subject matter experts in a variety of topics, including **system admin tools, platform support, and custom solutions**. These are some topics we can consult with you on using the hours included in your consulting packages.

To learn more, please email us at [ServicesSolutions@PowerSchool.com](mailto:ServicesSolutions@PowerSchool.com).



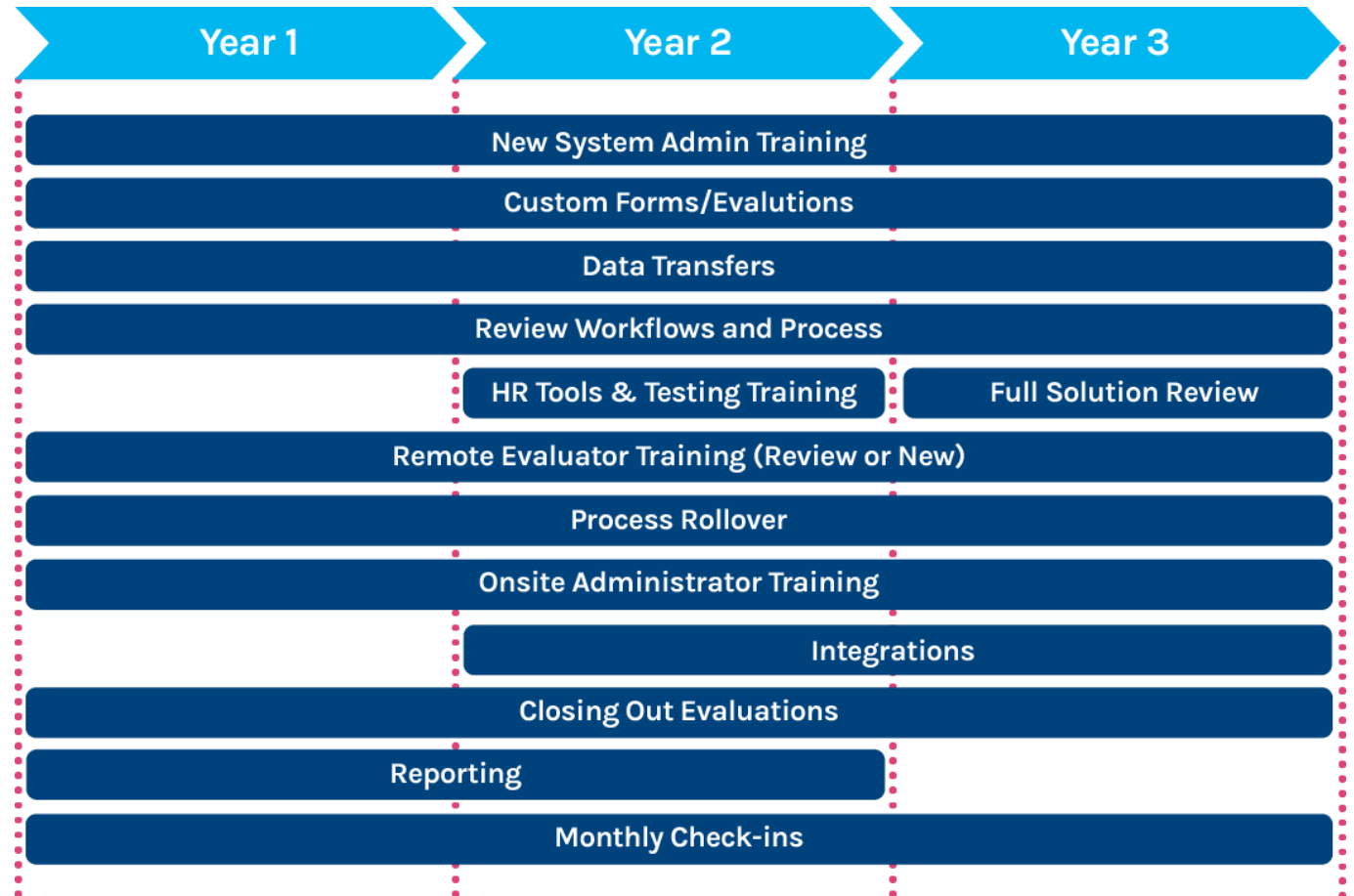
# Strategic Solutions Consulting



Utilize **Perform** consulting services to gain timely answers to your most pressing needs.

The Strategic Solutions Consulting team consists of subject matter experts in a variety of topics, including **system admin tools, platform support, and custom solutions**. These are some topics we can consult with you on using the hours included in your consulting packages.

To learn more, please email us at [ServicesSolutions@PowerSchool.com](mailto:ServicesSolutions@PowerSchool.com).



# Strategic Solutions Consulting

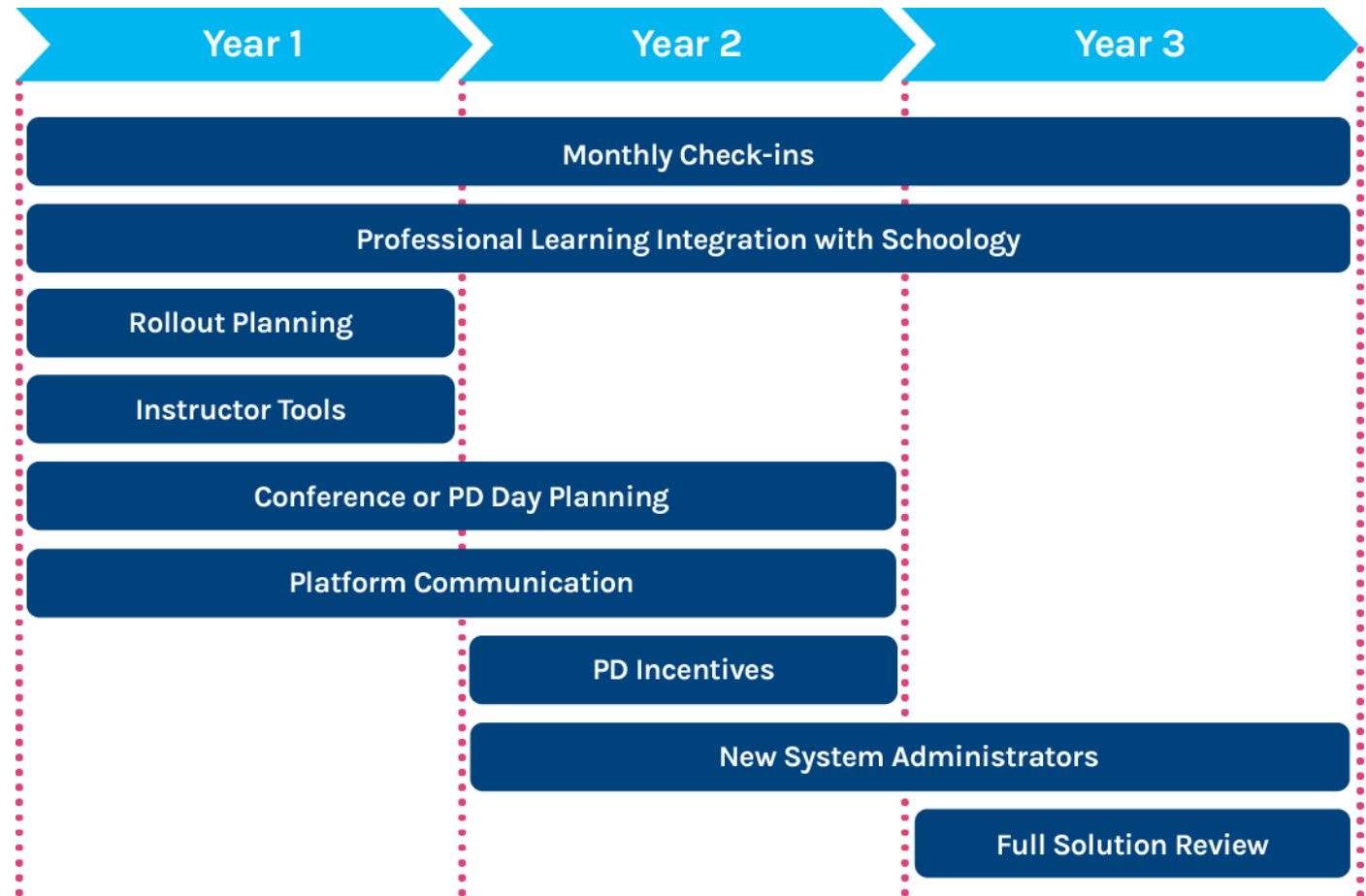


## Unified Talent™ Professional Learning

Utilize **Professional Learning** consulting services to gain timely answers to your most pressing needs.

The Strategic Solutions Consulting team consists of subject matter experts in a variety of topics, including **system admin tools, platform support, and custom solutions**. These are some topics we can consult with you on using the hours included in your consulting packages.

To learn more, please email us at [ServicesSolutions@PowerSchool.com](mailto:ServicesSolutions@PowerSchool.com).



# TalentEd Office Hours

## What are Office Hours?

- Office Hours are small trainings that happen every month where support will review a different topic for each product below.
- The support agent will do a presentation over the topic of the month and then hold a Q&A session at the end to go over any questions.

## Where can I find the TalentEd Office Hours?

- Events Hub tab on the PowerSchool Community Page
- On each products knowledge base page. Below are links for each product that will help you register and view past recordings of Office Hours.
  - [Applicant Tracking Office Hours Page](#)
  - [Employee Records Office Hours Page](#)
  - [Perform Office Hours Page](#)
  - [SmartFind Express Office Hours Page](#)

Register to attend these FREE sessions.

Last Tuesdays of every month at 12 PM Pacific Time / 3 PM Eastern Time

The next session is on March 28, 2023

Topic - Job Postings, Requisitions, Application Types, and Custom Forms

REGISTER NOW

### Topics:

- Tue 31-Jan-2023 - Candidate Portal/Buildings/Locations - [Watch the Recording](#)
- Tue 28-Feb-2023 - Best Practices: Setting up a User, Daily Processes, How to Purge, Notifications, Drop Down Box Choices - [Watch the Recording](#)
- Tue 28-Mar-2023 - Job Postings/Requisitions/ Application Types/ Custom Forms - [Watch the Recording](#)
- Tue 25-Apr-2023 - Interviews/Screenings /Begin Hire/Job Offers
- Tue 30-May-2023 - Views and Reports
- Tue 27-Jun-2023 - Security/ Global Security Settings/ Custom Filters
- Tue 25-Jul-2023 - Best Practices: Setting Up a User, Daily Processes, How to Purge,



# How to Use your Talent EICs

- 1 Talent PowerUps
- 2 Discuss Best Practices
- 3 Targeted How-To's
- 4 Preparing for Out-of-the-Box usage

# Your Talent Education Impact Consultant Team



**Sean Vair**

**Experience:**

Classroom Teacher / Dept Coord  
*11 Years*

Educational Technology  
*8 Years*



**Stuart Aron**

**Experience:**

Teacher & Coach  
*32 Years*

Educational Technology  
*4 Years*



**Cortnie Shaffer**

**Experience:**

Classroom Teacher  
*5 Years*

Assistant Principal  
*3 Years*

Education Technology  
*1 Year*

# 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*

# Professional Learning

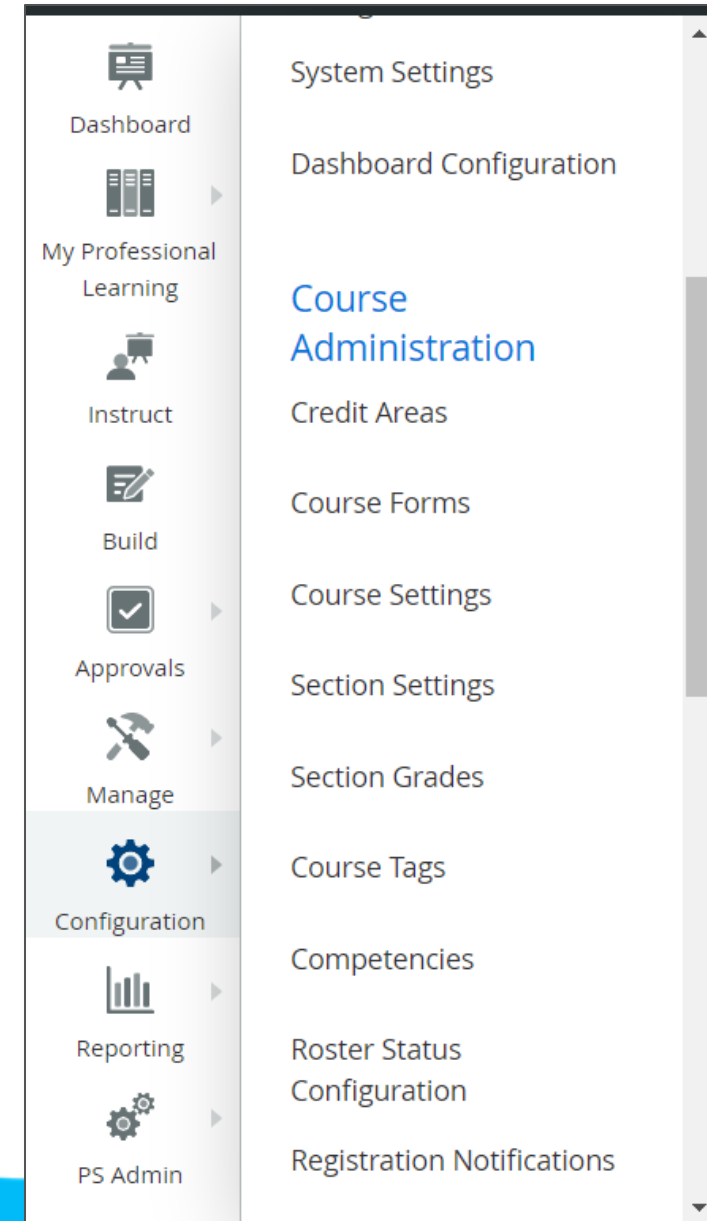
New PD Administration

# The *New* Professional Learning

**Self-Serviceability** that makes it easy for Professional Learning to work for *your* district

- Configure roles and permissions without asking PowerSchool!
- Configure courses and sections without asking PowerSchool!
- Configure your Professional Learning **without asking PowerSchool!**

Customers with the New Professional Learning felt it was **23% easier to make configuration changes** and felt they had **30% more autonomy** over their Professional Learning product.

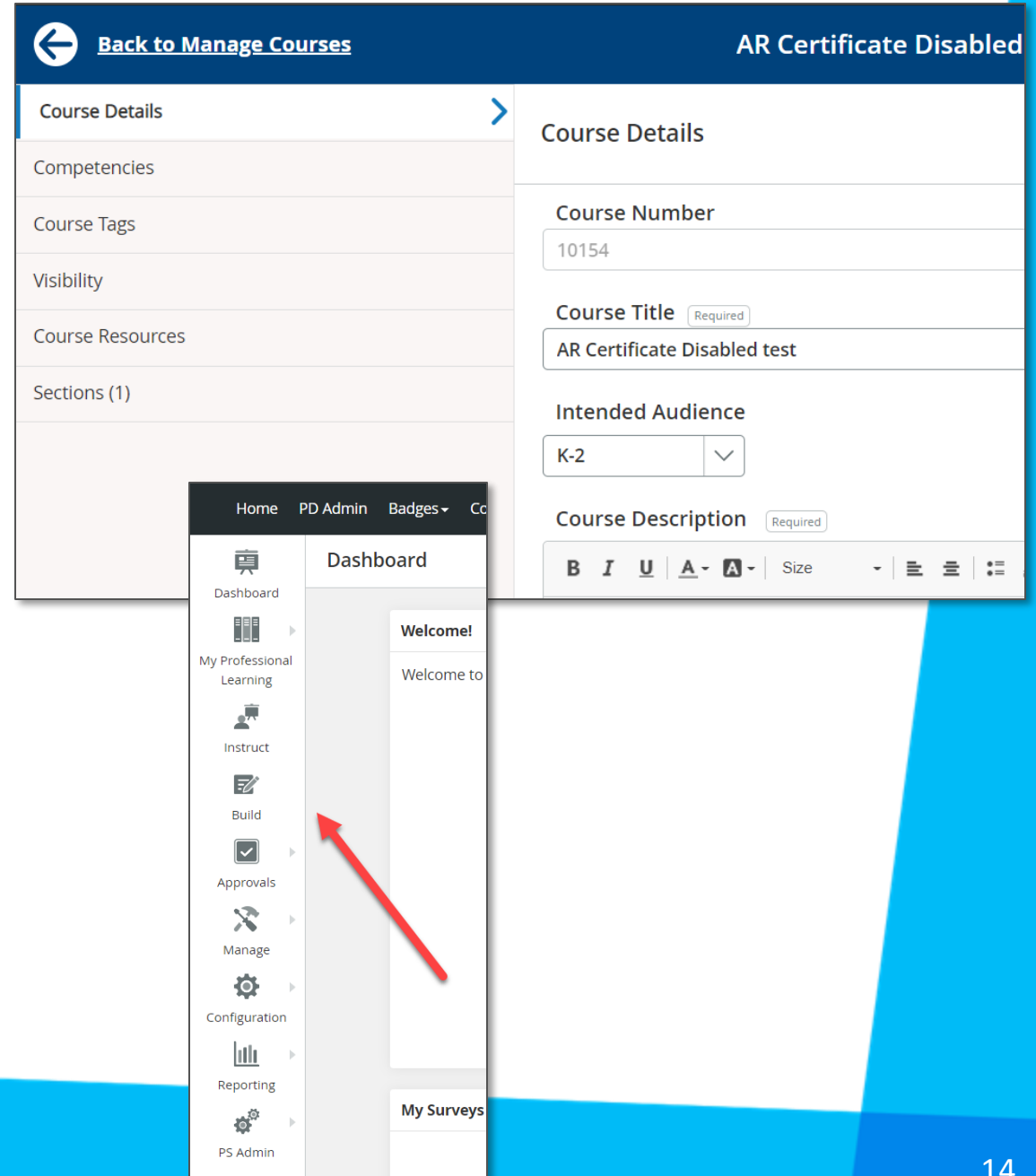


# The *New* Professional Learning

**Modern, intuitive design** that is simpler to navigate with a familiar PS interface

- Course information all on one page!
- Easier survey creation and management
- Everything you need is one click away on the left-side navigation bar
- Look and feel matches your other PowerSchool products!

Customers with the New Professional Learning created **65% less support tickets** than customers with the Old Professional Learning.



# Breakout Room Topics

Applicant Tracking

- Managing Interviews

Perform

- New Dynamic Groups (Product)

Employee Records & Onboarding

- Making Changes & Keeping Tasks Moving

Professional Learning

- Targeting User Groups with PD Playlist

# Applicant Tracking

Managing Interviews



# Agenda

- 1 Understanding your process
- 2 Using Applicant Tracking to Manage Interviews
- 3 Best practice ideas
- 4 Q & A

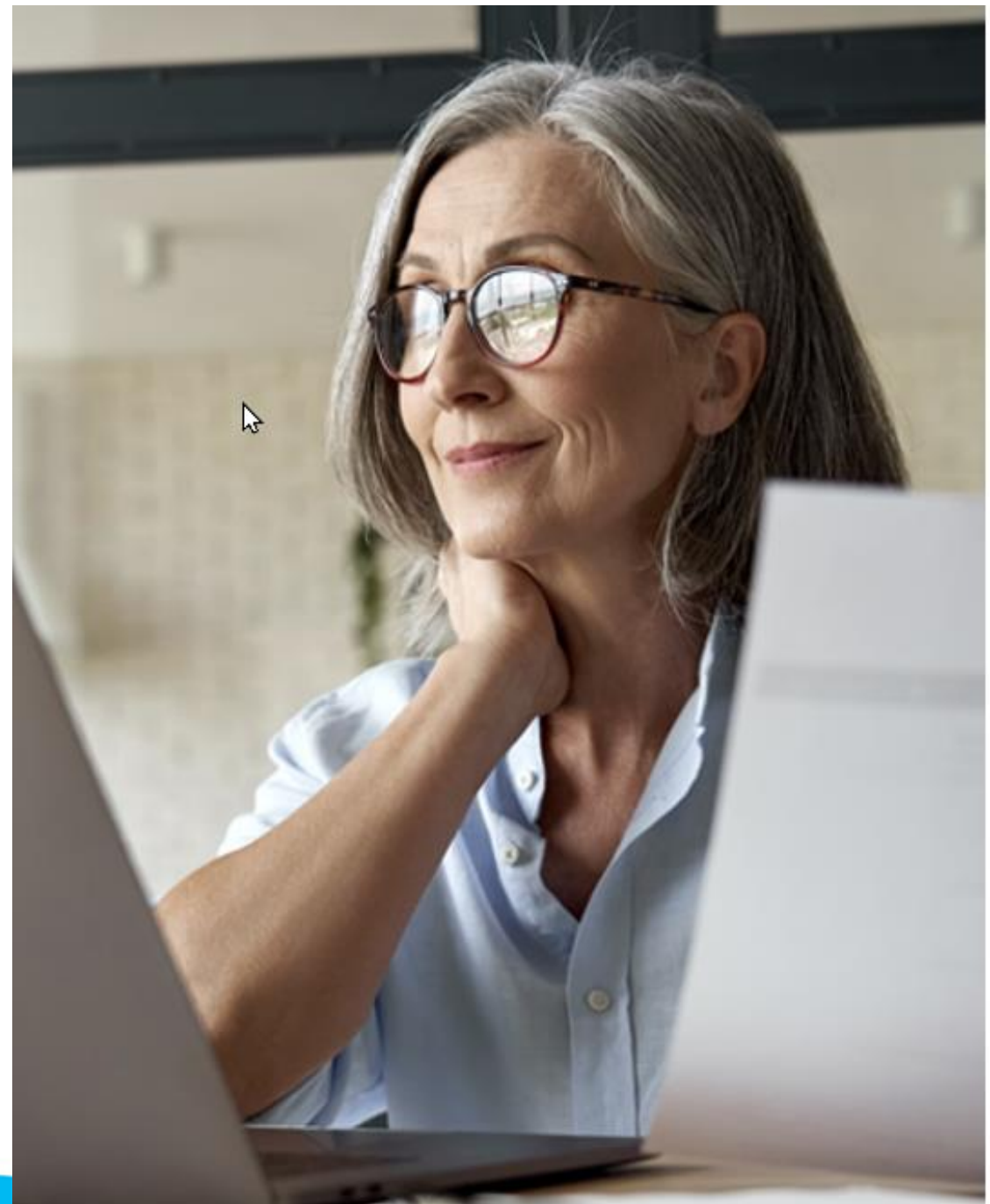
# Understanding Your Process

- How are you currently managing interviews?
- What is working?
- What is mandated/required?
- Which departments/people are involved?



# Managing interviews in Applicant Tracking

Let's review the process...



# Add Interview Availability

Click on the **Tools** tab and select **My Interviews**

The screenshot displays the PowerSchool user interface. At the top, a navigation bar contains several tabs: TOOLS, APPLICATION MANAGER, DASHBOARD, REPORTS, ANALYTICS, CONFIGURE, and SUPPORT. A red arrow points to the TOOLS tab. Below the navigation bar, the TOOLS section is expanded, showing a grid of six tool categories. The 'Interviews & Recommendations' category is highlighted, and a red arrow points to the 'My Interviews' sub-option within it.

TOOLS	APPLICATION MANAGER	DASHBOARD	REPORTS	ANALYTICS	CONFIGURE	SUPPORT
<b>Posting Management</b> Job Postings Requisitions Requisition Approval	<b>Application Management</b> Application Manager	<b>Interviews &amp; Recommendations</b> My Interviews Hiring Approvals Job Offer Statuses				
<b>Document Library</b> Document Library	<b>Candidate Customer Service</b> Candidate FAQ Candidate Questions	<b>Job Fairs &amp; Career Days</b> Job Fairs Career Days				



# Add Interview Availability

Click Manage Availability

The screenshot displays the PowerSchool user interface. At the top, a navigation bar includes icons and labels for TOOLS, APPLICATION MANAGER, DASHBOARD, REPORTS, ANALYTICS, CONFIGURE, and SUPPORT. Below this, a secondary navigation bar contains three buttons: 'MY INTERVIEW CALENDAR SUBSCRIPTION', 'MANAGE AVAILABILITY', and 'MY INTERVIEWS'. A red arrow points to the 'MANAGE AVAILABILITY' button. The main content area shows a search bar, a filter bar with buttons for 'INVITED', 'ACCEPTED', 'DECLINED', 'COMPLETED', and 'ARCHIVED', and a table with columns for 'Candidate', 'Date', 'Type', 'Job', 'Location', and 'Internal'. The table is currently empty, displaying 'No Scheduled Interviews'. At the bottom of the table area, there are options for '0 Selected', 'Select All', 'Clear', and 'Bulk Actions' with a 'GO' button. An 'EXIT' button is located at the bottom right of the main content area. A copyright notice at the bottom reads: 'Copyright © 2005-2023 - PowerSchool | View Master Subscription Agreement'.

# Add Interview Availability

Click on the **Add Availability** button

TOOLS APPLICATION MANAGER DASHBOARD REPORTS ANALYTICS CONFIGURE SUPPORT

## MANAGE FUTURE INTERVIEW AVAILABILITY

Date ▲	Start Time	End Time	Job Postings
No schedule availabilities			

CANCEL REMOVE AVAILABILITY **ADD AVAILABILITY**

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# Add Interview Availability

## Create a New Interview Block

The screenshot shows a web application interface with a top navigation bar containing 'TOOLS', 'APPLICATION MANAGER', 'DASHBOARD', 'REPORTS', 'ANALYTICS', 'CONFIGURE', and 'SUPPORT'. On the left, a sidebar has 'MANAGE FUTURE' and a 'Date ▲' dropdown with the text 'No schedule availabilities'. The main content area features a modal window titled 'NEW INTERVIEW BLOCK'. This modal contains a 'Date \*' field with a calendar icon, 'Begin \*' and 'End \*' fields each consisting of three dropdown menus for hours, minutes, and seconds, and a 'Job Postings' dropdown menu. The 'Job Postings' menu is open, showing options: 'All', 'Future Certified Positions', 'Grade 2 Teacher', 'Grade 4 Teacher', 'Grade 5 Teacher', 'Grade 5 Teacher', 'Math Teacher', and 'Summer Teaching Position'. Below the dropdown is the instruction '(hold Ctrl + click to select multiple)'. At the bottom of the modal are 'CANCEL' and 'SAVE BLOCK' buttons. In the background, an 'ADD AVAILABILITY' button is visible.

# Schedule Interviews

## Select Application Manager

The screenshot shows a navigation interface with a top bar and a main menu. The top bar contains the following items: TOOLS (wrench icon), APPLICATION MANAGER (stack of papers icon), DASHBOARD (clock icon), REPORTS (document icon), ANALYTICS (gauge icon), CONFIGURE (gear icon), and SUPPORT (info icon). The main menu is titled 'TOOLS' and contains six tiles:

- Posting Management**: Job Postings, Requisitions, Requisition Approval
- Application Management**: Application Manager
- Interviews & Recommendations**: My Interviews, Hiring Approvals, Job Offer Statuses
- Document Library**: Document Library
- Candidate Customer Service**: Candidate FAQ, Candidate Questions
- Job Fairs & Career Days**: Job Fairs, Career Days

Two red arrows highlight the 'APPLICATION MANAGER' option in the top bar and the 'Application Manager' sub-option within the 'Application Management' tile.



# Schedule Interviews

Check the boxes of the applicant(s) you wish to interview

**APPLICATION MANAGER**

-- Select a Saved Search -- **NEW SEARCH**

Search   
Start typing to search on First Name, Last Name or Position Title.

**ACTIVE** DEACTIVATED ALL                

VIEW: Default View

Results 1-14 of 14

<input type="checkbox"/>	Last Name	First Name	Conf#	Status	App Date	Posting ID	Position Title			
<input type="checkbox"/>	Smith	Charlie	31	Application Received	03/29/2023	1012	Grade 5 Teacher			
<input type="checkbox"/>	Smith	Charlie	30	Application Received	03/29/2023	11	Grade 4 Teacher			
<input type="checkbox"/>	Franklin	Jen	29	Application Received	03/28/2023	1012	Grade 5 Teacher			
<input type="checkbox"/>	Edwards	John	24	Application Received	03/13/2023	1014	Math Teacher			
<input type="checkbox"/>	Smith	Elizabeth	20	Application Received	03/07/2023	1012	Grade 5 Teacher			
<input type="checkbox"/>	Garza	Maverick	18	Application Received	03/06/2023	1012	Grade 5 Teacher			
<input type="checkbox"/>	Gibson	Ashton	17	Application Received	03/06/2023	1011	Summer Teaching Position			

# Schedule Interviews

Select **Interview** and **Go** within the Bulk Actions drop down

<input checked="" type="checkbox"/>	Smith	Charlie	6	Application Received	06/22/2012	5	Future Classified Positions			
<input type="checkbox"/>	Four	Applicant	5	Application Received	09/09/2008	2	Head Track and Field Coach			
<input checked="" type="checkbox"/>	Three	Applicant	4	Application Received	09/09/2008	1	Bus Driver			
<input type="checkbox"/>	Two	Applicant	3	Application Received	09/09/2008	3	High School Math Teacher			
<input checked="" type="checkbox"/>	Smith	Charlie	2	Application Received	09/09/2008	3	High School Math Teacher			
<input type="checkbox"/>	Smith	Charlie	1	Application Received	09/09/2008	2	Head Track and Field Coach			

1

Results 1-14 of 14   [Select All \(14\)](#)   [Clear Selected \(3\)](#)   [Export Results](#)

Bulk Actions:

Results per Page    Jump to Page

[ADVANCED CONFIGURATION](#)

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# Schedule Interviews

On Schedule Interview form, you can add additional interviewers via the **Add Interviewers** button

The screenshot displays the 'SCHEDULE INTERVIEW' form. At the top, it shows the applicant's name 'Charlie Smith' and email 'test@netchemia.com'. Below this, the 'DETAILS' section contains several fields: 'Interviewer/s\*' with 'Darren Smith' and a red 'x' icon; a text box containing 'No Additional Interviewers'; 'Job Posting\*' set to 'Grade 5 Teacher'; 'Interview Type' set to 'Human Resources Level'; 'Interview Location\*' set to 'Ocean Elementary School'; and 'Interview Survey' set to '(none)'. A red arrow points to a dark button labeled 'ADD INTERVIEWERS' located to the right of the 'No Additional Interviewers' text box. At the bottom of the form, the word 'SCHEDULING' is visible.





# Check Interview Invitations

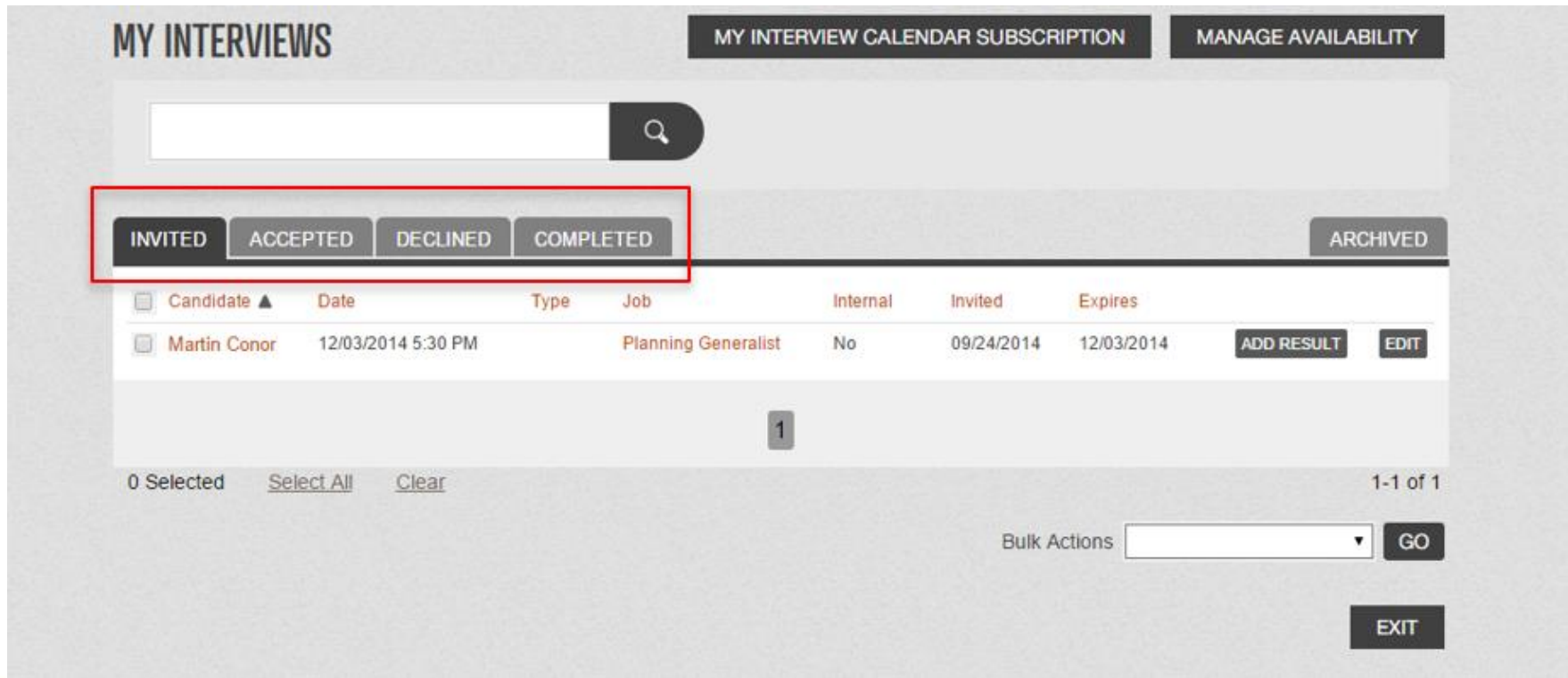
Select the **My Interviews** link

The screenshot shows a navigation bar at the top with the following items: TOOLS (with a wrench icon), APPLICATION MANAGER (with a folder icon), DASHBOARD (with a clock icon), REPORTS (with a document icon), ANALYTICS (with a pie chart icon), CONFIGURE (with a gear icon), and SUPPORT (with an information icon). Below the navigation bar is a grid of tool tiles under the heading 'TOOLS'. The tiles are:

- Posting Management**: Job Postings, Requisitions, Requisition Approval
- Application Management**: Application Manager
- Interviews & Recommendations**: My Interviews, Hiring Approvals, Job Offer Statuses
- Document Library**: Document Library
- Candidate Customer Service**: Candidate FAQ, Candidate Questions
- Job Fairs & Career Days**: Job Fairs, Career Days

# Check Interview Invitations

On the My Interviews page, interviews are sorted according to whether the applicant has been invited, accepted, denied or has already completed an interview



The screenshot shows the 'MY INTERVIEWS' interface. At the top, there are links for 'MY INTERVIEW CALENDAR SUBSCRIPTION' and 'MANAGE AVAILABILITY'. Below these is a search bar. A filter menu is highlighted with a red box, containing buttons for 'INVITED', 'ACCEPTED', 'DECLINED', 'COMPLETED', and 'ARCHIVED'. The 'INVITED' button is selected. Below the filter menu is a table with the following data:

<input type="checkbox"/>	Candidate ▲	Date	Type	Job	Internal	Invited	Expires		
<input type="checkbox"/>	Martin Conor	12/03/2014 5:30 PM		Planning Generalist	No	09/24/2014	12/03/2014	ADD RESULT	EDIT

At the bottom of the table, there is a '1' in a box, indicating one item is selected. Below the table, there are options for '0 Selected', 'Select All', and 'Clear'. On the right side, there is a 'Bulk Actions' dropdown menu with a 'GO' button and an 'EXIT' button at the bottom right.

# Add Interview Survey Results

Click on **Application Manager**

The screenshot displays the PowerSchool navigation menu and a grid of tool tiles. The navigation menu at the top includes: TOOLS (wrench icon), APPLICATION MANAGER (stack of papers icon), DASHBOARD (clock icon), REPORTS (document icon), ANALYTICS (gauge icon), CONFIGURE (gear icon), and SUPPORT (info icon). A red arrow points to the APPLICATION MANAGER menu item. Below the menu is a grid of tool tiles under the heading 'TOOLS'. The tiles are: 1. Posting Management (document icon) with sub-items: Job Postings, Requisitions, Requisition Approval. 2. Application Management (stack of papers icon) with sub-item: Application Manager. A red arrow points to this sub-item. 3. Interviews & Recommendations (person with star icon) with sub-items: My Interviews, Hiring Approvals, Job Offer Statuses. 4. Document Library (stack of papers icon) with sub-item: Document Library. 5. Candidate Customer Service (headset icon) with sub-items: Candidate FAQ, Candidate Questions. 6. Job Fairs & Career Days (person icon) with sub-items: Job Fairs, Career Days.

# Add Interview Survey Results

Click the **blue folder** for the candidate you interviewed

**APPLICATION MANAGER**

-- Select a Saved Search -- NEW SEARCH

Search   
Start typing to search on First Name, Last Name or Position Title.

ACTIVE DEACTIVATED ALL VIEW: Default View

Results 1-14 of 14

<input type="checkbox"/>	Last Name	First Name	Conf#	Status	App Date	Posting ID	Position Title			
<input type="checkbox"/>	Smith	Charlie	31	Application Received	03/29/2023	1012	Grade 5 Teacher			
<input type="checkbox"/>	Smith	Charlie	30	Application Received	03/29/2023	11	Grade 4 Teacher			
<input type="checkbox"/>	Franklin	Jen	29	Application Received	03/28/2023	1012	Grade 5 Teacher			
<input type="checkbox"/>	Edwards	John	24	Application Received	03/13/2023	1014	Math Teacher			
<input type="checkbox"/>	Smith	Elizabeth	20	Application Received	03/07/2023	1012	Grade 5 Teacher			
<input type="checkbox"/>	Garza	Maverick	18	Application Received	03/06/2023	1012	Grade 5 Teacher			



# Add Interview Survey Results

Click on the candidate's **Interview** tab

The screenshot displays the 'APPLICATION MANAGER' interface for a candidate named Charlie Smith, a Grade 5 Teacher. The interface includes a navigation bar with tabs: APP, DOCS, **INTERVIEW** (highlighted with a red arrow), REFERENCE, BACKGROUND, HQ, TASK, SCREENING, CONTACT, VERIF, and NOTES. Above the tabs, there are action buttons: EMAIL, RED FLAG, INTERNAL, BEGIN HIRE, and PROFILE. The main content area shows a table with application details and a job description section.

Application Date ▼	Posting Title	Active	Status	Prescreen Rating	Hired	
03/29/2023 11:32 AM	Grade 5 Teacher	Yes	Application Received			HTML EDIT

**Job Description**

**Summary**  
Under general supervision, develops curricula and creates, implements, and delivers educational programs for student audiences to achieve the goals and objectives of a contract or grant-funded program. Advises, tests, and teaches students in a variety of subjects. Plans, develops and oversees community outreach programs. Promotes programs through community networking and recruiting efforts; recruits and trains tutors and teachers. May coordinate and implement recruitment and retention programs, special events, and support services. May provide financial aid/scholarship advisement for targeted student populations.

**Duties and Responsibilities**

1. Develops, plans, and implements curriculum, lesson plans, and educational programs for student audiences within areas of expertise.
2. Advises, tests, and teaches students audiences in a variety of academic subjects. Presents and reinforces learning concepts within a specified subject or subject area.

**ALL APPLICATIONS**

Application Date ▼	Posting Title	Active	Status	Prescreen Rating	Hired	
▶ 03/29/2023 11:32 AM	Grade 5 Teacher	Yes	Application Received			HTML EDIT

# Add Interview Survey Results

In the Results section, click Add Interview Result and choose the Interview Survey you need to fill out

**ADD INTERVIEW RESULT**

Choose Interview Survey:

**CANCEL** **NEXT**

PROFILE UPDATED: 03/24/2023  
**Charlie Smith**  
Grade 5 Teacher

TOOLS APPLICATION MANAGER DASHBOARD REPORTS ANALYTICS CONFIGURE SUPPORT

Next Applicant »

PROFILE

APP DOCS **INTERVIEW** REFERENCE BACKGROUND HQ TASK SCREENING CONTACT VERIF NOTES

**SCHEDULING**

<input type="checkbox"/>	Schedule Status	Date	Type	Job Title	Interviewer(s)	Results Count	
<input type="checkbox"/>	No Response	TBD (by 03/24/2023)		Grade 5 Teacher	Daniel Davis + 4	0 - Add	<b>EDIT</b>
<input type="checkbox"/>	No Response	TBD (by 02/24/2023)		Future Classified Positions	Edie Test	0 - Add	<b>EDIT</b>

0 Selected [Select All](#) [Clear](#) [Delete](#) 1-2 of 2

**SCHEDULE INTERVIEW**

**RESULTS**

<input type="checkbox"/>	Date	Type	Job Title	Result By	Result Date	Rating	Recommendation
No Interview Results							

0 Selected [Select All](#) [Clear](#) [Delete](#) 0-0 of 0

# Best practice ideas

- Be prepared
  - Block the time for all involved early in the interview process
  - Allow candidates to self-schedule
  - Create Survey for interview, or verify existing Survey
  - Interviewers not in ATS system can be added as level 2 user (manually or from Records)
- Set common expectations for interviewers
- Use the Application Manager to filter and swatch Candidates

The screenshot displays the 'APPLICATION MANAGER' interface. At the top, there are navigation links for 'TOOLS', 'APPLICATION MANAGER', and 'DASH'. Below this, a search bar contains the text '-- Select a Saved Search --' and a 'NEW SEARCH' button. To the right are 'HIDE' and 'CLEAR' buttons. A search filter is set to 'Posting ID' with the value '909169' and a 'Contains' operator. Below the search bar are 'ADD', 'CLEAR', 'SAVE AS', and 'SEARCH' buttons. A secondary search bar is labeled 'Search' with a placeholder 'Start typing to search on First Name, Last Name or Position Title.' Below the search bar are tabs for 'ACTIVE', 'DEACTIVATED', and 'ALL', and a 'VIEW:' dropdown set to 'Certification & Undergrad GPA'. The main content is a table of candidates with columns: Last Name, First Name, Status, Position Title, Certificatio.., Certificatio., and GPA. The table shows 19 results, with the first 10 visible. The candidates are: Robinson, Robert (Application Received, Elementary School Teacher, 9-12 Industrial Technology, California, 3.75); Knutson, Blanche (Application Received, Elementary School Teacher, K-12 Elementary, Kansas, 3.8); Oliver, Kimberly (Application Received, Elementary School Teacher, K-12 Special Reading, California, 3.9); Nichols, Heather (Application Received, Elementary School Teacher, 5-9 Mathematics, Kansas, 3.9); Chaffee, Sydney (Application Under Review, Elementary School Teacher, 9-12 Business Education, Maryland, 3.0); Allen, Clark (Application Under Review, Elementary School Teacher, K-12 Elementary, Texas, 3.5); Smith, Joe (Application Under Review, Elementary School Teacher, 5-9 Business Education, Arizona, 3.5); Flemming, Donna (Application Received, Elementary School Teacher, K-12 Elementary, Kansas, 3.9); and Wheatley, Paul (Application Received, Elementary School Teacher, K-12 Elementary, Colorado, 3.9). Each row has a checkbox, a colored swatch, and icons for document, trash, and folder.

<input type="checkbox"/>	Last Name	First Name	Status	Position Title	Certificatio..	Certificatio..	GPA			
<input type="checkbox"/>	Robinson	Robert	Application Received	Elementary School Teacher	9-12 Industrial Technology	California	3.75			
<input type="checkbox"/>	Knutson	Blanche	Application Received	Elementary School Teacher	K-12 Elementary	Kansas	3.8			
<input type="checkbox"/>	Oliver	Kimberly	Application Received	Elementary School Teacher	K-12 Special Reading	California	3.9			
<input type="checkbox"/>	Nichols	Heather	Application Received	Elementary School Teacher	5-9 Mathematics	Kansas	3.9			
<input type="checkbox"/>	Chaffee	Sydney	Application Under Review	Elementary School Teacher	9-12 Business Education	Maryland	3.0			
<input type="checkbox"/>	Allen	Clark	Application Under Review	Elementary School Teacher	K-12 Elementary	Texas	3.5			
<input type="checkbox"/>	Smith	Joe	Application Under Review	Elementary School Teacher	5-9 Business Education	Arizona	3.5			
<input type="checkbox"/>	Flemming	Donna	Application Received	Elementary School Teacher	K-12 Elementary	Kansas	3.9			
<input type="checkbox"/>	Wheatley	Paul	Application Received	Elementary School Teacher	K-12 Elementary	Colorado	3.9			



PowerSchool

# Employee Records

Making Changes & Keeping Tasks Moving

# Agenda

- 1 Reasons for Change
- 2 What is Changing?
- 3 Reports
- 4 Checklists, Documents, & E-Forms
- 5 Workflows

# Reasons for Change

New or Updated Forms

New or Updated Processes

Temporary or Permanent Position Assignments

# What is Changing?

- Dropdown lists Updates
- Resources Updates
- E-Form Updates
- Changing from a Basic to a Mixed E-Form
- Document Settings
- Checklist Tasks
  - New vs. Update
- Workflows



# Reports

- Best Practice to start by checking
- Checklist Completion Report
- Custom Reports for form status

# Checklist Completion Report

- Select Checklist
- Change Filters
  - Checklist View
  - Assigned Date
- Apply
- Review List
- Force Complete as needed

Checklist Completion

New Hire - Certified

Hide Filters

Export

▼ Checklist View

- All checklists
- Complete checklists
- Incomplete checklists
- Highlight tasks that need my attention

► Task Type

► Locations

► Job Types

▼ Assigned Date

- Past 3 months
- Past 6 months
- Past 12 months
- All Time
- Custom

From:

To:

► Completed Date

► Tasks

Filter by keyword

<input type="checkbox"/>	First	Last	Location	Assigned	I-9	I-9 Supporting Documentation	W-4	State Tax Form	Employee Information Form	24 Pay Plan Enrollment	Direct Deposit	Staff ID Picture	New Account Information	Status
<input checked="" type="checkbox"/>	Savannah	Scott	Vernon Middl...	04/03/2023 10:13 PM										
<input type="checkbox"/>	Stella	Gomez	Mountain Ele...	04/03/2023 10:13 PM										
<input type="checkbox"/>	Preston	Burns	Ocean High Sc...	04/03/2023 10:07 PM										

10 items per page

1 / 1

1 - 3 of 3 items

Bulk Actions Force Complete Go

# Custom Reports

- Add form elements
- Include Form Data that you desire
- Review Created, Submitted, and Completed
- Export as needed

Custom Report

TRANSFER REQUEST FORM [Back to Report Settings](#)

Generated 9:39 PM 4/10/2023 by Edie Smith

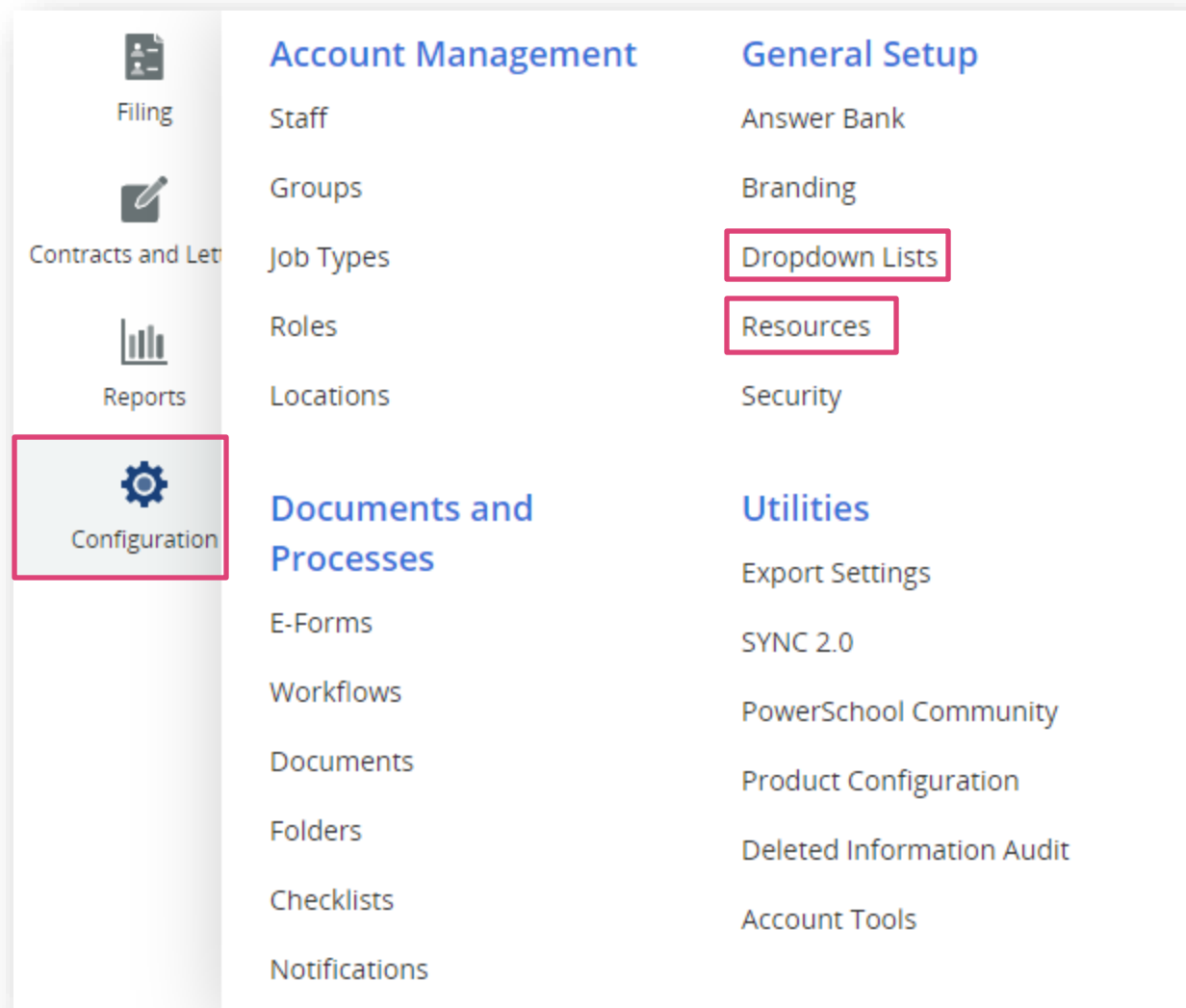
▶ Locations  
▶ Job Types  
▶ Date Range  
▼ Form Data  
     Completed ⓘ  
     Submitted and completed ⓘ  
     Draft, submitted, and completed ⓘ  
▶ Form Status  
▶ Users

[Hide filters](#)  [Export](#)

I.	Current Locatio...	Current Job Title...	Submitted Date Ti...	Created Date Ti...	Completed Date Ti...
1.	15	Paraprofessional	10/31/2022 09:01 PM	10/31/2022 09:01...	
1.	15	Paraprofessional	10/31/2022 09:03 PM	10/31/2022 09:02...	
1.	15	Paraprofessional	10/31/2022 08:52 PM	10/31/2022 08:52...	
1.	15	Art Teacher	11/01/2022 09:45 AM	11/01/2022 09:45...	
1.	2	Future Certified ...	03/13/2023 11:47 AM	11/01/2022 11:02...	
1.	2	Future Certified ...	03/13/2023 11:47 AM	11/01/2022 11:02...	
2.	15	Economics Teac...	11/01/2022 09:47 AM	11/01/2022 09:47...	11/01/2022 11:01 AM

# Updating Dropdown Lists & Resources

- Edit
- Replace
- If in E-Forms, save final to apply changes



# Updating an E-Form

- Edit
- Save Draft
- Save Final

### Edit Custom Form

☰ 8 Clone Edit Delete

Comments

Add Question  ▾

There is a limit of 200 Questions per Form

Cancel Save Draft Save Final

# New E-Form or Changing E-Form Types for an existing Document

- Create new E-Form
- Change associated E-Form in the Document Settings

Edit Document

Settings Workflow

Maryland Form MW507

Please provide a name for this Document.\*

Maryland Form MW507

This Document will be associated with the following E-Form.\*

Maryland Form MW507

Allow staff to upload a file to submit this Document in lieu of completing an E-Form?\*

-- No --

Should this document be a Blank Form/Blank Doc? (Choose this option if you allow staff to initiate a submission of this Document.)\*

Yes, Put in Sleeve Maryland Form MW507 (Payroll)

# Updating Checklists

- Editing a checklist task
  - Might add an additional task if existing task is in process
- Adding a new task
  - Will add a new task for all "Incomplete" checklists

The screenshot shows a web application interface for managing checklists. A modal dialog titled "Edit Task" is open, allowing users to edit a specific task. The dialog is divided into several sections:

- Documents:** Contains a "Task Name\*" field with the value "State Tax Form" and a "Description" text area.
- Document Required:** A dropdown menu currently showing "Payroll : Maryland Form MW507".
- Responsible User\*:** A dropdown menu currently showing "Assigned Staff".
- Prerequisite Tasks:** A list of tasks with checkboxes: "1. I-9", "2. I-9 Supporting Documentation", and "3. W-4".
- Task Priority:** Radio buttons for "No Priority" (selected) and "Low Priority".

At the bottom of the dialog are "Cancel" and "Save" buttons. In the background, a checklist titled "New Hire - Certified" is visible, with an "Edit" button for the "State Tax Form" task highlighted with a red box.

# Updating Workflows

- Identify Change Needed
- Will affect forms going forward, not any currently in workflow
- If it is a basic workflow, should the change apply to all documents currently associated with that workflow?
- Groups
  - Benefits of using groups to keep tasks moving
  - Tasks will update in workflow based on groups

The screenshot shows a software interface titled "Edit Workflow Steps". It contains a list of four main steps, each with a close button (X) in the top right corner. Step 1 is "1. Signature by Direct Report". Step 2 is "2. Approval by Human Resources Associates". Step 3 is "3. Conditional Steps" and is expanded to show three sub-conditions: "a. Location Type is Elementary" with sub-step "i. Review by Elem Instructional Supervisors"; "b. Location Type is Middle School" with sub-step "i. Review by Middle School Instructional Supervisors"; and "c. Location Type is High School" with sub-step "i. Review by High School Instructional Supervisors". Step 4 is "4. Review by Direct Report". At the bottom right of the interface is a blue button labeled "Add Step".





PowerSchool

## Unified Talent Perform

## Dynamic Group Creation



# Agenda

- Introductions
- Overview
- Demo
- Resources
- Q & A

# Overview

# Using Groups in Perform:

- Groups dropdown in My Staff to limit the display of staff to those contained in that Group.
- Criteria for groups in Automations for processes include Groups
- Select Groups when creating a Role.
- Route to a Group of staff in a workflow.

# Perform – Dynamic Group Creation

Available Now with our April 2023 Release!

- Set up groups according to rules & let the system find who belongs in the group.
- Use Perform Groups as you currently do.
- A new background process runs to keep the group up-to-date as staff move around the district.

# Demo

... the good stuff

# Additional Resources: Product Article on this Feature

The screenshot displays the PowerSchool Community website interface. At the top, a dark blue navigation bar contains the PowerSchool logo and the text "PowerSchool Community". Below this, a secondary navigation bar lists several menu items: "Product Support", "Product Roadmap", "Services", "Contact Support", "Our Community", "Events Hub", and "PeopleAdmin". On the right side of this bar, there are icons for notifications (with a "99+" badge), email, and a profile picture.

The main content area has a light blue background with a blurred image of people. The heading "Perform Product Updates" is prominently displayed. Below the heading is a search bar with a dropdown menu labeled "This category" and a search input field containing the text "Search here".

A breadcrumb trail at the bottom of the main area reads: "Home > ... > Administrators > Perform > Perform Product Updates". To the right of the breadcrumb is an "OPTIONS" dropdown menu.

The page is divided into several columns of content:

- Product Updates:** A section with a green underline. The text reads: "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:** A section with a green underline. The text reads: "Navigate to the Perform Forum to start a discussion and use **Options** and **Subscribe** to receive updates and notifications."
- Contact Support:** A section with a green underline. The text reads: "Authorized contacts can visit the Case Portal to log a case with Support." and "For performance disruption updates click here to read more."
- Important Articles:** A section with a blue underline. It lists several article titles: "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", and "Hmm Looks Like You Don't Have Access Error Message".
- Knowledge Base Articles:** A section with a blue underline. It contains two sub-sections:
  - Perform Release Notifications (36 Articles):** Lists several article titles related to Unified Talent Perform releases (e.g., "Unified Talent Perform 23.4.0.0").
  - Perform Product Communications (5 Articles):** This section is highlighted with a red border. It lists several article titles, including "Groups - Dynamic Creation", "Support for Educator and Teacher Social...", "Webinar Recording: Unified Talent...", "Webinar: Perform 20.7.0.0 Release Review...", and "Webinar: Unified Talent Perform 20.3...".
- Top Contributors:** A section with a blue underline. It lists five contributors with their profile pictures: AndreaP4, BethFarmer, MuskanS, and Rayyan\_Mohammed.





# Groups also exist in Records...

- Groups in Record <> Groups in Perform
- Records does not yet support rule-based Groups
- Best practice: Keep Records Groups in Records & Perform Groups in Perform





# Professional Learning

## Targeting User Groups with PD Playlist





**What Word Would You Use to Describe Effective Professional Development?**

# Build a Culture of Continuous Learning



Ongoing

Active

Specific

Consistent

Innovating

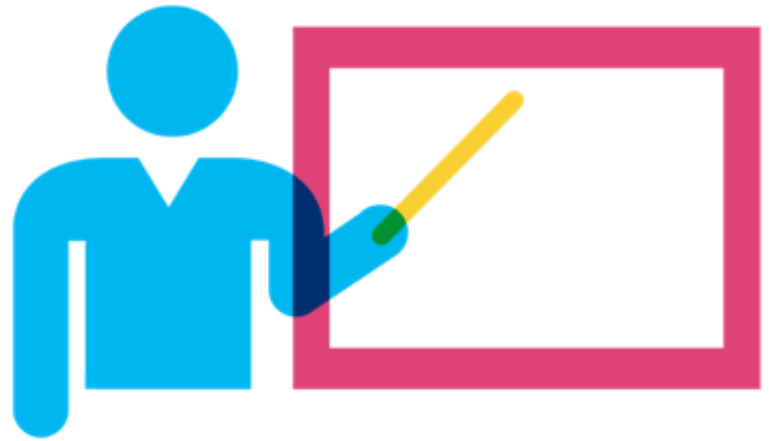
# Benefits of Professional Development

Continuous PD adds new knowledge to the teacher's skill set and deepens the competency of the areas where the teacher is already productive.

Professional development increases the knowledge and practices of the adults and results in skills transfer between adults and students.

Access to high-quality and continuous professional development gives teachers the tools to enhance their teaching and impact students at all achievement levels.

When educators learn, their students learn





# Professional Learning

## Targeting User Groups with PD Playlist



# What are PD Playlist?

Groups of courses that your district has pulled together into a collection.

Courses within a Playlist may be required or optional.

Playlists may be assigned to participants, or they may choose to seek them out on your own.

# Why PD Playlist?



# When Might a PD Playlist be Useful?

- **Local or State Compliance**
  - Bullying
  - Bloodborne Pathogen
  - State Assessment Training
- **Stipend**
  - ESL
  - Special Education
  - Mentor
- **Targeted Growth/District Alignment**
  - Classroom Management
  - Effective Questioning Strategies
  - SEL



# Let's Take a Look

## Learning Opportunities

Browse or search the course catalog.

Search for a course or section.

 ⓘ

Courses  PD Playlist [Advanced Search](#) [Show All](#)



Digital Transformation Playlist Level 1

No credits available Views 1 Courses

**Joining  
a Playlist**

## PD Playlist Dashboard

PD Playlist Dashboard

[Manage PD Playlists](#) [All PD Playlists Participants](#)

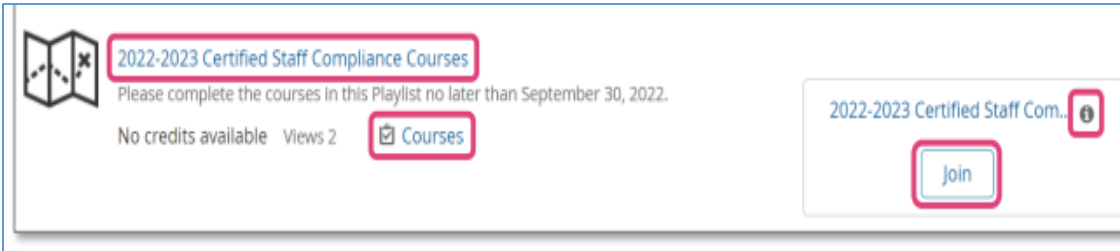
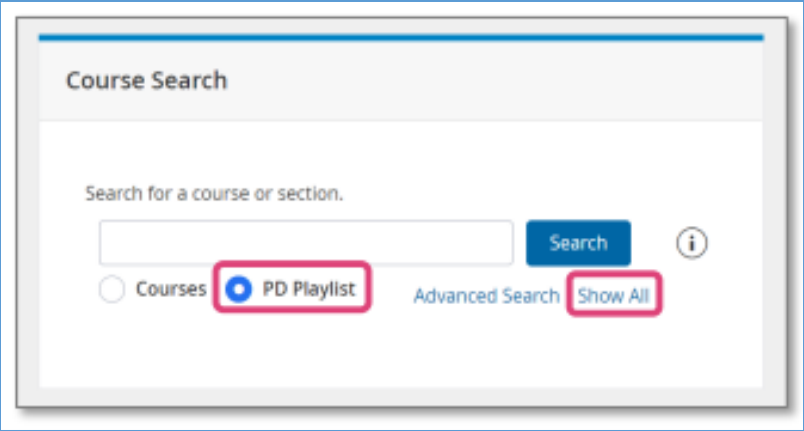
Search Title:  [Add Filter](#)

	TITLE	MODERATOR(S)	CURATOR(S)	RELEASED	CREDIT	PARTICIPANTS	START DATE	END DATE	LAST UPDATE
<input type="checkbox"/>	Technology Playlist	Administrator, PowerSchool	Educator, Ethan	Yes	-	14	10/06/2021	10/26/2021	Administrator, PowerSchool 02/23/2022
<input type="checkbox"/>	Performance Plan Courses	Administrator, PowerSchool	-	Yes	-	0	04/01/2021	04/17/2022	Administrator, PowerSchool 10/26/2021

Compliance

**Creating  
a Playlist**

# Joining a Playlist



Once you join a PD Playlist, you must still register for the courses within.

Details Participants **Courses** Discussion

Complete the 2 required courses and 2 of the 3 elective courses.

Instructor Led  Self Paced  Not Started  In Progress  Completed

Course Name	Required/Elective	Section	Section Time	Section Location	Status
<input checked="" type="radio"/> *A+ Teaching Strategies That Work	Required	-	self-paced	online	<input type="radio"/>
<input checked="" type="radio"/> 21st Century Teaching and Learning	Elective	-	self-paced	online	<input type="radio"/>
<input checked="" type="radio"/> Are you Smarter than your Smart Board	Elective	10236	August 17, 2022 - August 17, 2022	-	<input checked="" type="radio"/>

# Creating a Playlist

Home Observations Badges Courses External Credit Request Transcript Mobile Registration Approval Staff Evals My Courses Course Catalog Resources Reporting Administration My Staff Mentoring Calibration MY Evals

## PD Playlist Dashboard

PD Playlist Dashboard

[Create PD Playlist](#)

Manage PD Playlists All PD Playlists Participants

Search Title:  [Add Filter](#)

	TITLE	MODERATOR(S)	CURATOR(S)	RELEASED	CREDIT	PARTICIPANTS	START DATE	END DATE	LAST UPDATE
<input type="checkbox"/>	Technology Playlist	Administrator, PowerSchool	Educator, Ethan	Yes	-	14	10/26/2021	10/26/2023	Administrator, PowerSchool 02/20/2023
<input type="checkbox"/>	Performance	Administrator,		Yes		0	09/01/2021	06/17/2022	Administrator, PowerSchool

### PD Playlist Credit Approval

0 PD Playlist credit requests require your approval.

### My PD Playlists

2 PD Playlists [Show](#) All PD Playlists



### Welcome

Its time for technology that works with your school and district, not against it. PowerSchools unified education technology software solutions power the education ecosystem like never before. From the back office to the classroom to the home, we unify your technology, putting everyone on the same team to unlock students potential. Discover what PowerSchool can do for you today.



How Many Credits do I have?

### 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](mailto:enhanced-portal@truenorthlogic.com).

### My Courses

You currently have an outstanding balance.

- My Learning Opportunities View All
- Test Aron SCORM Legacy
- SCORM Sample

# Things to Remember



# Things to Remember



# Things to Remember





PowerSchool