

# Welcome to the Unified Talent PowerSchool PowerUp!



June 2023

# Today's Agenda

- Welcome
- Making Change Happen
- Breakout Rooms
  - Employee Records
  - Perform
  - Professional Learning
  - SmartFind Express



# Making Change Happen

- 1 Preparing for change
- 2 Train your staff
- 3 Adjust your outcomes
- 4 Collect Feedback

# Preparing for Change

## Managing Complex Change Model

Vision	Skills	Incentives	Resources	Action Plan	=	CHANGE
Vision	Skills	Incentives	Resources	Missing	=	TREADMILL
Vision	Skills	Incentives	Missing	Action Plan	=	FRUSTRATION
Vision	Skills	Missing	Resources	Action Plan	=	RESISTANCE
Vision	Missing	Incentives	Resources	Action Plan	=	ANXIETY
Missing	Skills	Incentives	Resources	Action Plan	=	CONFUSION

Adapted from Knoster, T., 1991 in TASH Conference, Washington D.C., from Enterprise Group, LTD



# Train your Staff

- Search the PowerSchool Community to find resources.
- Connect with an EIC to discuss plans for adoption
- Connect with your CSM to purchase training or consultation



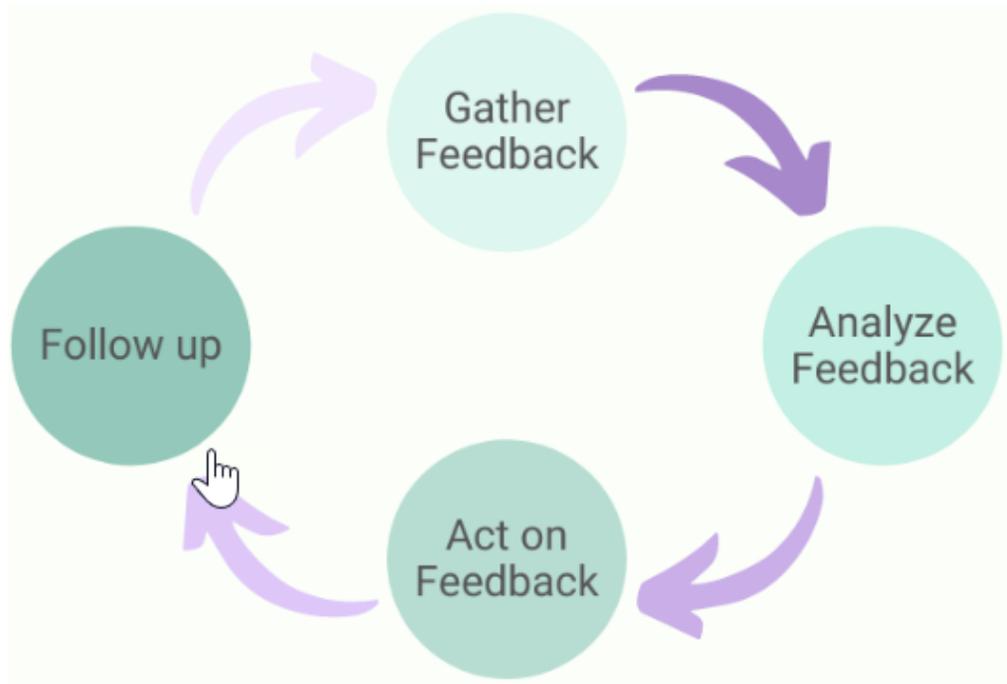


# Adjust your Outcomes

- Do you have reports that need to be adjusted for the change?
- Are all impacted parties aware the change is happening?
- Are there additional needs?



# Collect Feedback



# 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*

# Breakout Room Topics

## Employee Records & Onboarding

- New Calculations to Enhance Mixed Forms

## Perform Peer PowerUp

- Exporting to Create Advanced Dashboard Views

## Professional Learning

- Conferencing Using Professional Learning

## SmartFind Express

- Exciting Updates to the Dashboard and Reporting

# Employee Records

New Calculations to Enhance Mixed Forms

# Agenda

- 1 Preparing for the New Year
- 2 PDF Form Builder
- 3 New Form Fields
- 4 Notification for Document Submitted
- 5 Q&A

# Preparing for the New Year

- New Features
- Streamline Onboarding
- Increase Efficiency and Accuracy
- Add Security & Communication



# PDF Form Builder

- New way to build your **e-forms**
- Uses a **PDF form** as a background image
- Forms can be in their **original format**
- Form fields are mapped to data fields allowing **reporting**

The screenshot displays the PDF Form Builder interface. On the left is a sidebar with a list of form elements: Basic Employee Info, Calculation, Check Box, Date Picker, Dropdown, Label, PlainText Box, Radio Button, RichText Box, Signature, and Text Box. The main area shows a preview of the 'FORM MW507 Employee's Maryland Withholding Exemption Certificate'. The form includes fields for personal information (First Name, Middle Name, Last Name, Social Security Number, Street Address, City, State, Zip Code) and a list of exemption questions. A 'Properties' panel is overlaid on the right, showing configuration options for a selected field: 'Field Name' (with a 'required' tag), 'Direct Report Permission' (set to 'Editable'), 'Supervisor Permission' (set to 'Editable'), and a 'Required Field' checkbox.

# New Form Fields

Calculations

Default Date

Default Checkboxes

Linking

Visibility

Formula

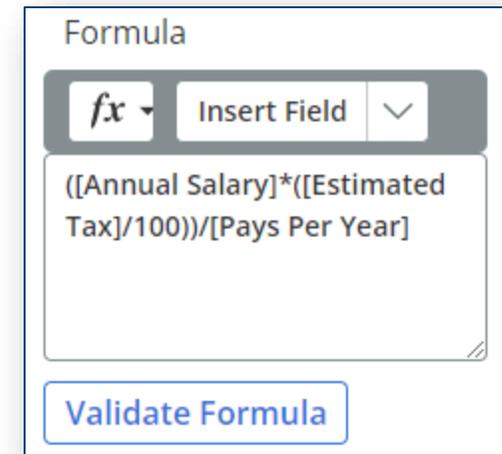
*fx* Insert Field

$$([Annual\ Salary]*([Estimated\ Tax]/100))/[Pays\ Per\ Year]$$

Validate Formula

# Calculations

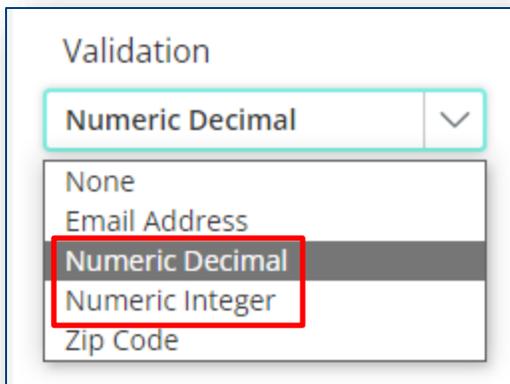
- Allows for the display of resulting formulas based on other fields on the form
- The result of a calculation displays as a **2-digit decimal**
- Calculations are read-only fields which generally support basic arithmetic fields (+, -, \*, /)
- Other supported formulas: "Average" "Sum", "Minimum", "Maximum".



The screenshot shows a 'Formula' dialog box. At the top, there is a label 'Formula'. Below it is a toolbar with an 'fx' icon, an 'Insert Field' button, and a dropdown arrow. The main area of the dialog contains the formula: 
$$\frac{([\text{Annual Salary}] * ([\text{Estimated Tax}] / 100))}{[\text{Pays Per Year}]}$$
 At the bottom of the dialog is a 'Validate Formula' button.

# Calculations

- In order for a field to be used within a calculation:
  - It must be defined as a **textbox** with the validation of either **Numeric Integer** or **Numeric Decimal**
  - The property **Field Used in Calculation** must be checked for the field to be included in the dropdown of available fields in the formula



Validation

Numeric Decimal

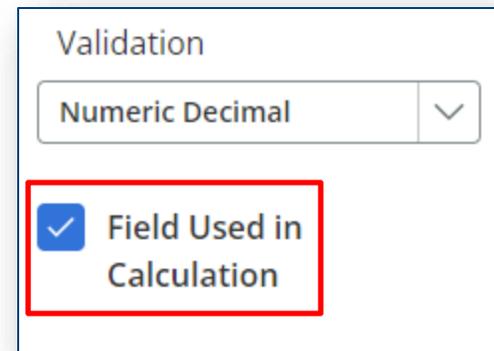
None

Email Address

Numeric Decimal

Numeric Integer

Zip Code



Validation

Numeric Decimal

Field Used in Calculation

# Default Date & Default Checkboxes

- Today's Date
- A Specific Date
- Checkboxes

Properties

Field Name required

Date

Default Answer

7/1/2023

Default "Today's" Date

Properties

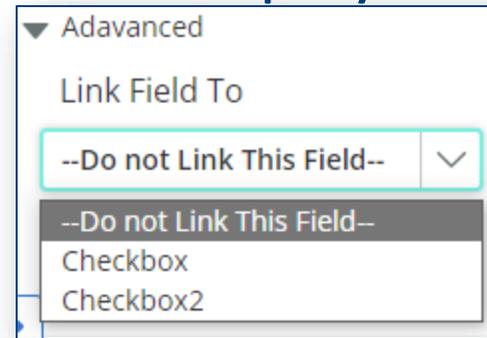
Field Name required

Selection

Default Answer

# Linking & Visibility

- Linking fields allows a new field to display the same value as another one



- Visibility allows you to control which fields are visible on a form
  - Option for Date Fields, Calculation Fields, and Text Boxes



# Notification for Document Submitted

- Optional notification whenever **Save Final** is submitted on a form
- Notification sends to both **Email** and **Personal Email** on employee's Records profile
- Best practice for security purposes
  - Financial Forms
  - Forms with Sensitive Data
  - Other forms that you want the employee to receive notification confirmation

# Notification for Document Submitted Requirements

- Notification must be enabled in Configuration>Notifications

Document - Requested	<input checked="" type="checkbox"/>	Edit	Preview
Document - Submitted	<input checked="" type="checkbox"/>	Edit	Preview
Documents - Due	<input checked="" type="checkbox"/>	Edit	Preview

- Notification must also be enabled for each document that you want this to send for in Configuration>Documents

Send notification when "Save Final" is clicked on the form (recommended for forms with financial or sensitive data).

# Resources

- PDF Form Builder PowerUp Recording
  - [PowerUps Recording: PDF Form Builder - October 2022 - PowerSchool Community](#)
- PDF Form Builder User Guide
  - [PDF Form Builder User Guide - PowerSchool Community](#)
- Notification for a Document Submitted
  - [Unified Talent Records | Notification: Document was Submitted \(as of TED 23.2.0.0\) - PowerSchool Community](#)



PowerSchool

# PowerUPs

## Unified Talent Professional Learning

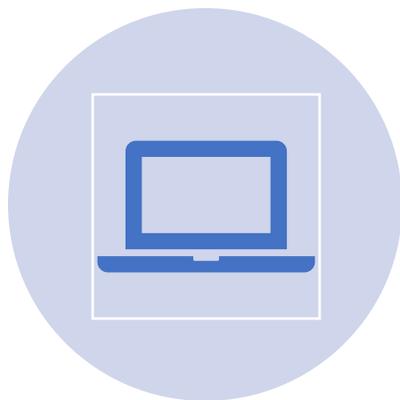
## Conferencing with Professional Learning



# Agenda



**BUILDING COURSES**

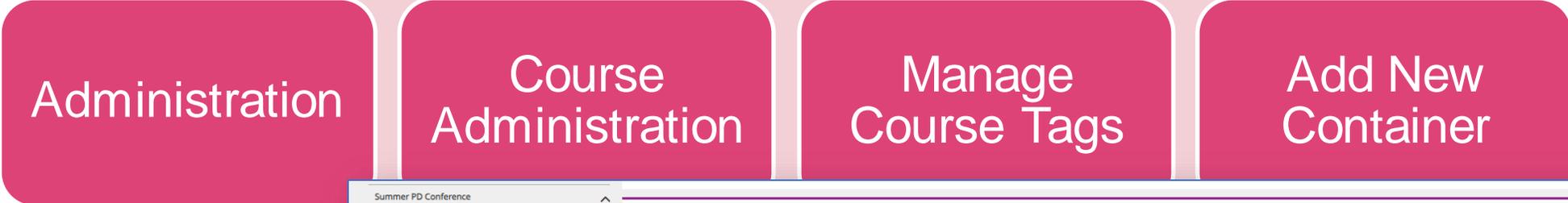


**VIEWING SCHEDULES**



**REPORTING**

# Course Tags



### Course by Subject

---

### Summer PD Conference

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Elementary  
Primary

Summer PD Conference

Reset

Elementary  
 Primary

Remote Learning Courses

Subject

Educational Practices

Student Support

Grade Level

Planning

Instruction

Learning Environment

Test

Learning Opportunity Type

Office

Rating

**Instructor Led** | #244 Primary Summer PD Conference 8:30 - 9:30

Please select one session that you would like to attend from 8:30-9:30 and register for that session.

Recommend Credit Views 1

Select a section to register

#267 The ABCs and 123s of Primary Education	Instructors: None	06/17/2023 @ 8:30 am	Registered
#266 Classroom Management in Primary	Instructors: None	06/17/2023 @ 8:30 am	Seats:30 left of 30
#265 Writing in the Primary Classroom	Instructors: None	06/17/2023 @ 8:30 am	Seats:30 left of 30

**Instructor Led** | #245 Primary Summer PD Conference 9:45-10:45

Please select one session that you would like to attend from 9:45-10:45 and register for that session.

Recommend Credit Views 0

Select a section to register

#270 The ABCs and 123s of Primary Education	Instructors: None	06/17/2023 @ 9:45 am	Seats:30 left of 30
#269 Classroom Management in Primary	Instructors: None	06/17/2023 @ 9:45 am	Registered
#268 Writing in the Primary Classroom	Instructors: None	06/17/2023 @ 9:45 am	Seats:30 left of 30

# Setting Up Courses



Instructor Led | #244 Primary Summer PD Conference 8:30 - 9:30

Please select one session that you would like to attend from 8:30-9:30 and register for that session.

Recommend       Credit       Views 1

Select a section to register

#267 The ABCs and 123s of Primary Education ⓘ	Instructors: None	06/17/2023 @ 8:30 am	📄 Seats:30 left of 30	Register
#266 Classroom Management in Primary ⓘ	Instructors: None	06/17/2023 @ 8:30 am	📄 Seats:30 left of 30	Register
#265 Writing in the Primary Classroom ⓘ	Instructors: None	06/17/2023 @ 8:30 am	📄 Seats:30 left of 30	Register

---

Instructor Led | #245 Primary Summer PD Conference 9:45-10:45

Please select one session that you would like to attend from 9:45-10:45 and register for that session.

Recommend       Credit       Views 0

Select a section to register

#270 The ABCs and 123s of Primary Education ⓘ	Instructors: None	06/17/2023 @ 9:45 am	📄 Seats:30 left of 30	Register
#269 Classroom Management in Primary ⓘ	Instructors: None	06/17/2023 @ 9:45 am	📄 Seats:30 left of 30	Register
#268 Writing in the Primary Classroom ⓘ	Instructors: None	06/17/2023 @ 9:45 am	📄 Seats:30 left of 30	Register

# Conference Advertising



Summer PD Conference

Don't forget to register for the Summer PD Conference!!



# Viewing Schedules



Apps Movies & TV Books Kids

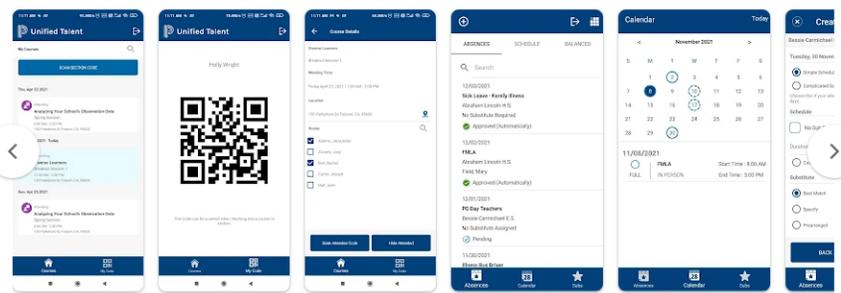
# Unified Talent Mobile

PowerSchool Group LLC

4.1★ 102 reviews 10K+ Downloads Everyone

[Install](#) [Add to wishlist](#)

You don't have any devices



**Developer contact** ▾

**More by PowerSchool Group LLC** →

- PowerSchool Mobile PowerSchool Group LLC 2.4★
- eSchoolPLUS Family PowerSchool Group LLC 1.7★



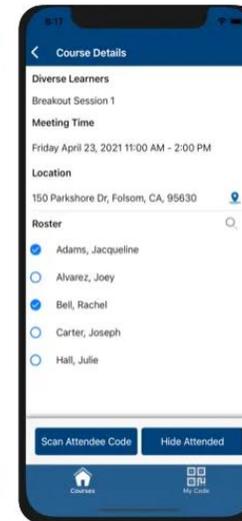
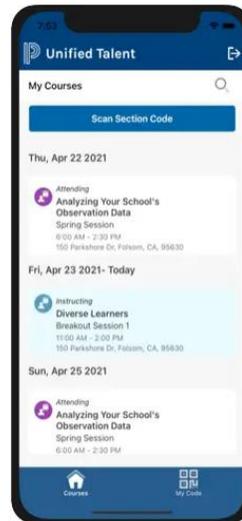
## Unified Talent Mobile

PowerSchool Group LLC

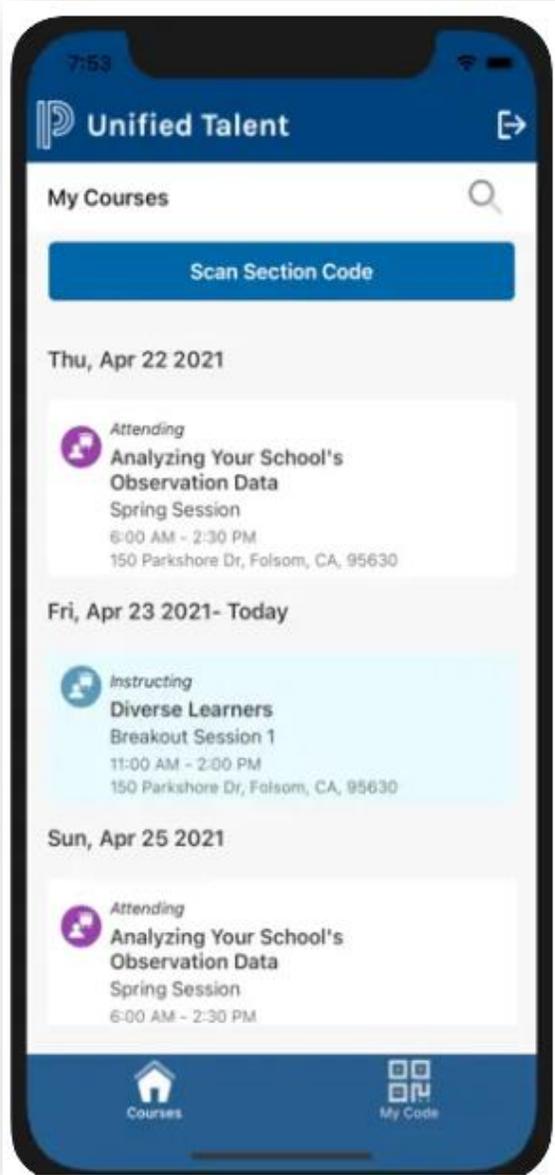
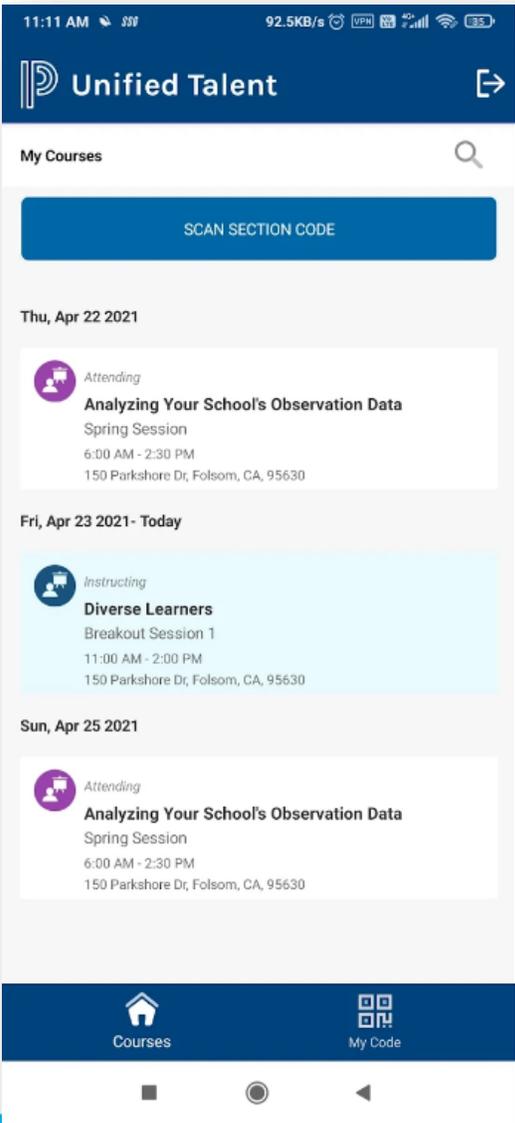
★★★★ 4.4 • 425 Ratings

Free

**Screenshots** iPhone iPad



# Viewing Schedules



# Reporting



-  Remember to create your course tag specific to the conference
-  Remember to tag every course with the conference course tag



# Professional Learning

Updates to the Catalog View and Registration Workflow in PD Admin



# Professional Learning

## Self-Serviceable Registration Workflows

Target Release: Summer 2023

### Highlights:

- Districts can configure and customize registration workflows on their own
- Consolidates all registration workflow configuration settings
- Workflow functionality remains the same

The screenshot displays the 'Professional Learning' configuration interface. The top navigation bar includes 'Home', 'PD Admin', 'Badges', 'Courses', 'Transcript', 'External Credit Request', 'PD Playlists', 'Reporting', 'Administration', and 'Support'. The left sidebar lists various modules: Dashboard, My Professional Learning, Instruct, Build, Approvals, Manage, Configuration (highlighted), Reporting, and PS Admin. The main content area is titled 'Registration Configuration' and contains two tabs: 'Configuration Options' and 'General Disclaimer'. Under 'General Settings', there are three options: 'Allow automatic withdrawals' (checked), 'Allow users to register for conflicting class times' (unchecked), and 'Registration Steps' (which includes 'Course Details and Credit Selection' (checked), 'Absence Request' (unchecked), and 'General Disclaimer' (unchecked)).

Customize the registration workflow to your district's needs

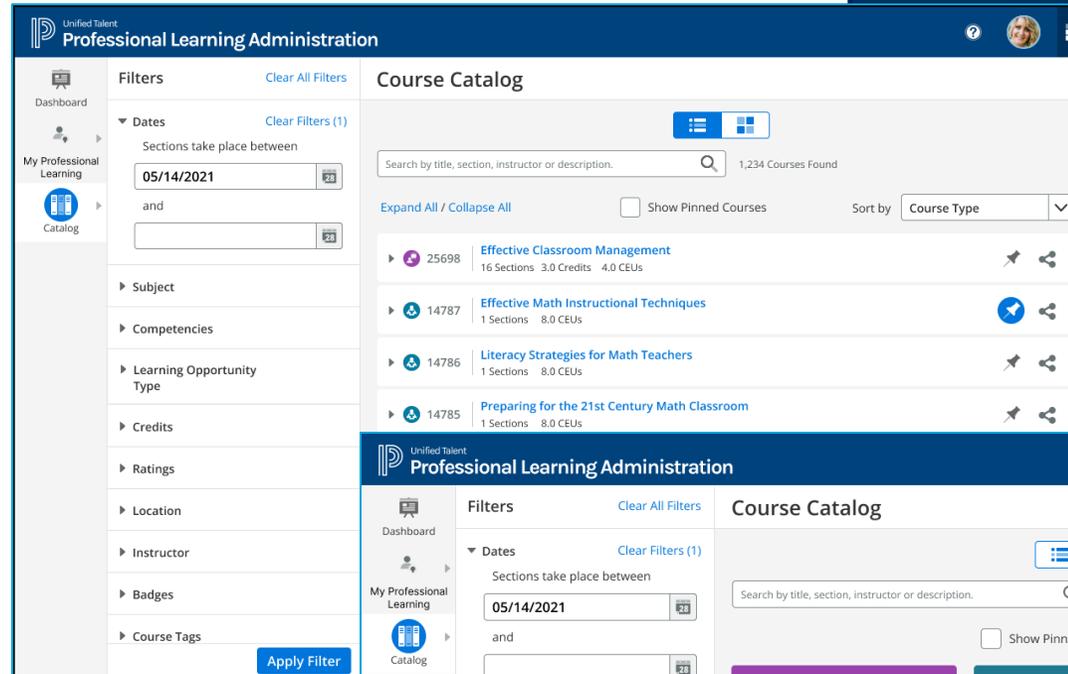
# Professional Learning Catalog View

Introducing a Grid and List view of the Catalog

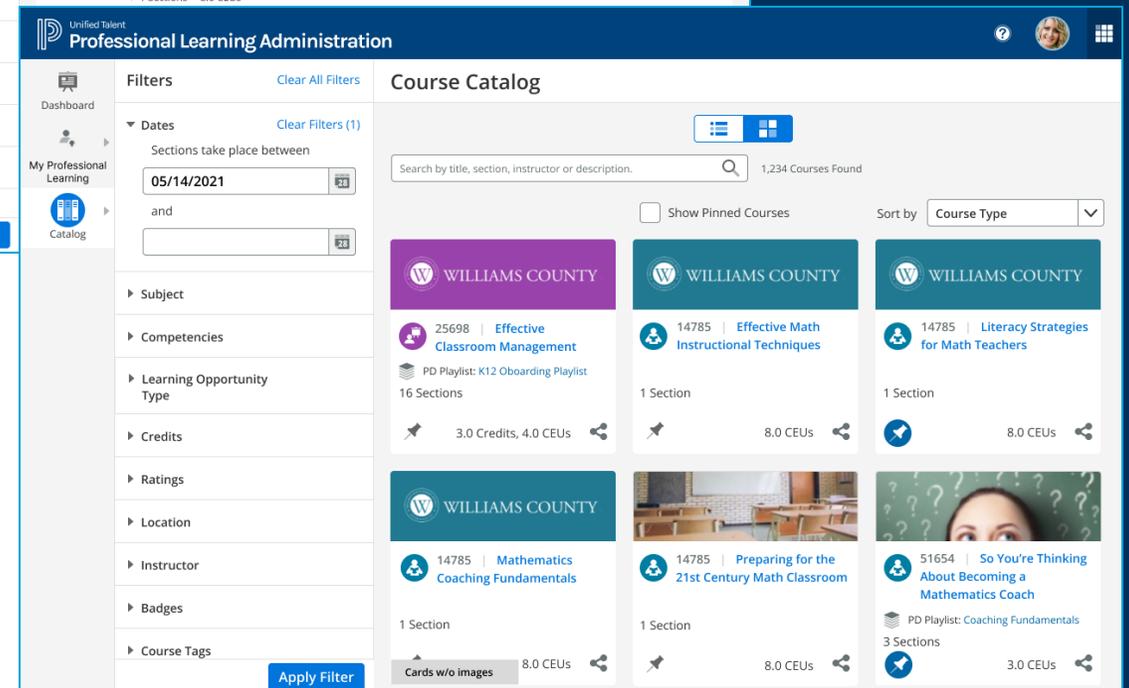
Target Release: Summer 2023

## Highlights:

- Districts have greater control over the look and feel of their catalog
- Learners have greater flexibility when looking for courses



View more results in a single page by expanding course of interest and collapsing the rest



# Professional Learning

## Improve Catalog Filtering

Target Release: Fall 2023

### Highlights:

- Self-serviceable configuration of course filters, usage of course tags
- Easier for learners to find the courses they need

Unified Talent Professional Learning

Home PD Admin Observations Badges Credentials Courses My Evaluations Staff Evaluations

### Course Catalog Configuration

Enable Faceted Navigation

*If enabled, this setting would allow you to select the filters that would be displayed in the course catalog.*

- Dates
- Learning Opportunity Type
- Subjects
- Summer '23 Courses
- Teaching Framework

Upload Course Tile Image

*Must be a .jpg, .jpeg or .png format no larger than 265px x 70px.*

### Filters

Clear All Filters

▼ Dates Clear Filters (1)

Sections take place between

and

- ▶ Subject
- ▶ Competencies
- ▶ Learning Opportunity Type
- ▶ Credits
- ▶ Ratings
- ▶ Location
- ▶ Instructor
- ▶ Badges
- ▶ Course Tags

Easily configure the filters you want available to users in your district when browsing the catalog of courses



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# SmartFind Express

Exciting Updates to the Dashboard and Reporting



# Exciting Updates to the Dashboard and Reporting



# SmartFind Express

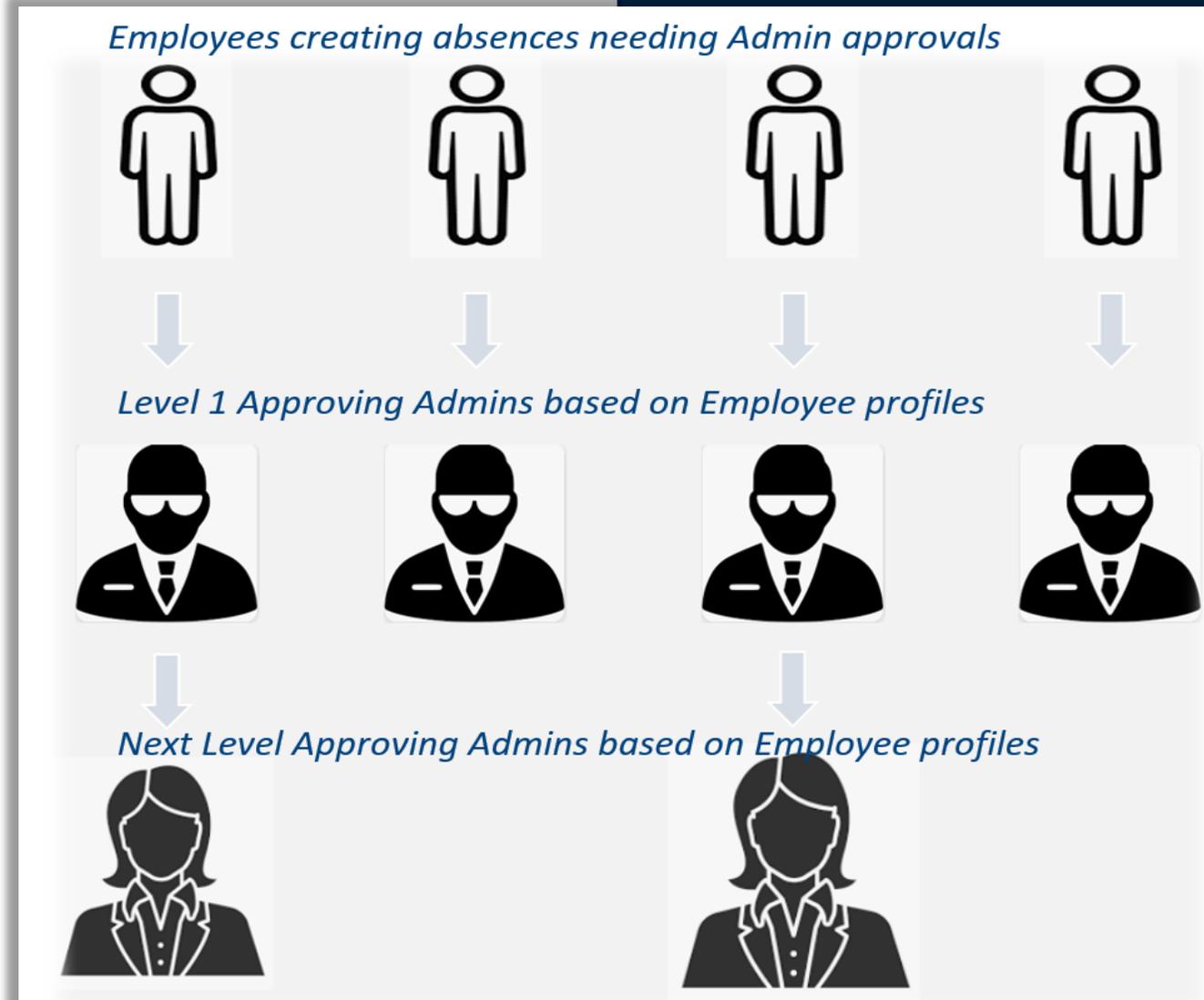
## Simplified Absence approvals

Released - February 2023

### Simplified absence approvals process

#### Highlights:

- Set up from profile (admin or employee) or via imports
- Detail absence approval history on the job, includes absence approval method
- Easy to replicate absence approval routing from one reason to another\*



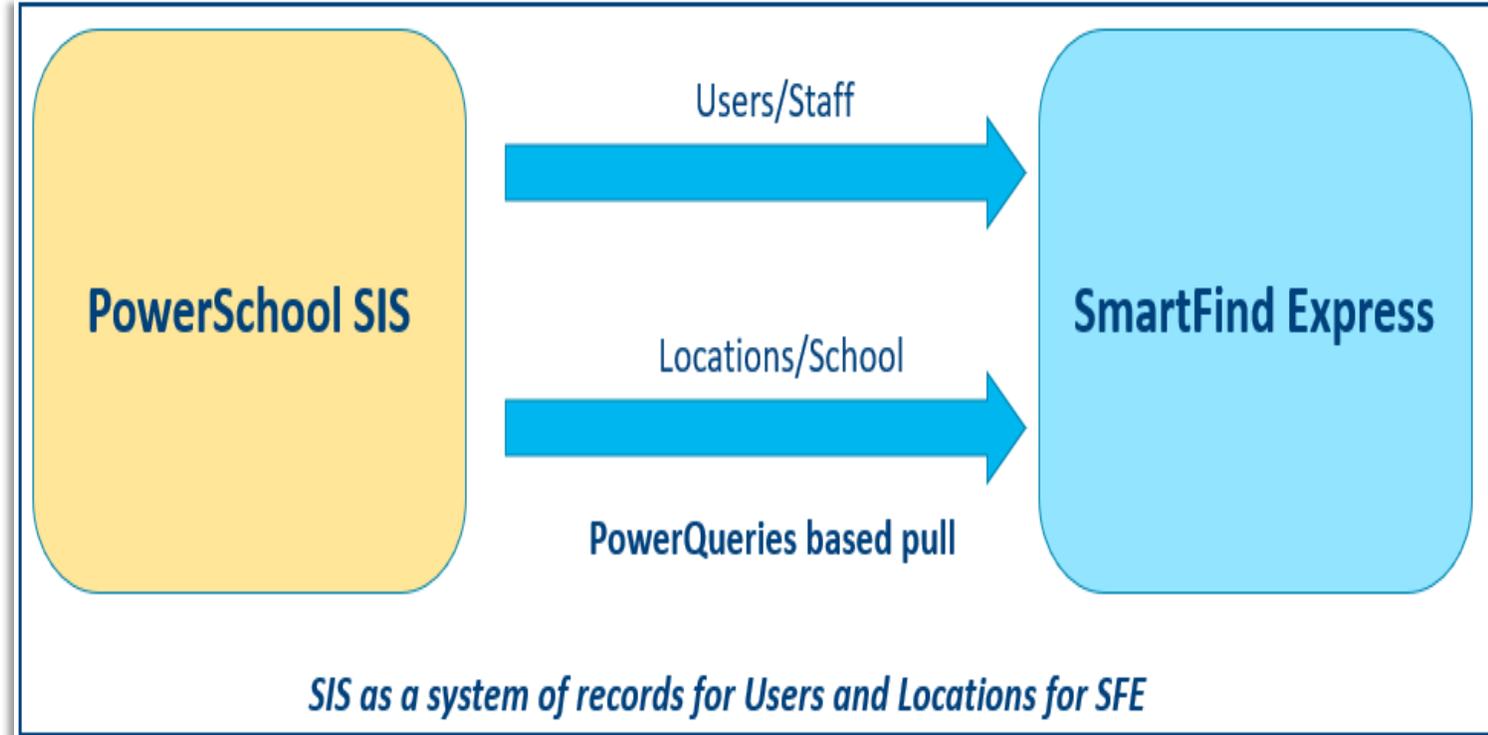
# SmartFind Express SIS Integration

*Target Release - May 2023*

PowerSchool SIS as a system of record for  
SmartFind Express

## Highlights:

- SIS syncs User data (**Staff in SIS**) and Locations data (**Schools in SIS**) Data to SFE
- Initial bulk sync of data from SIS to SFE saves time during implementation
- User/Location creations/updates sent from SIS to SFE – one way.



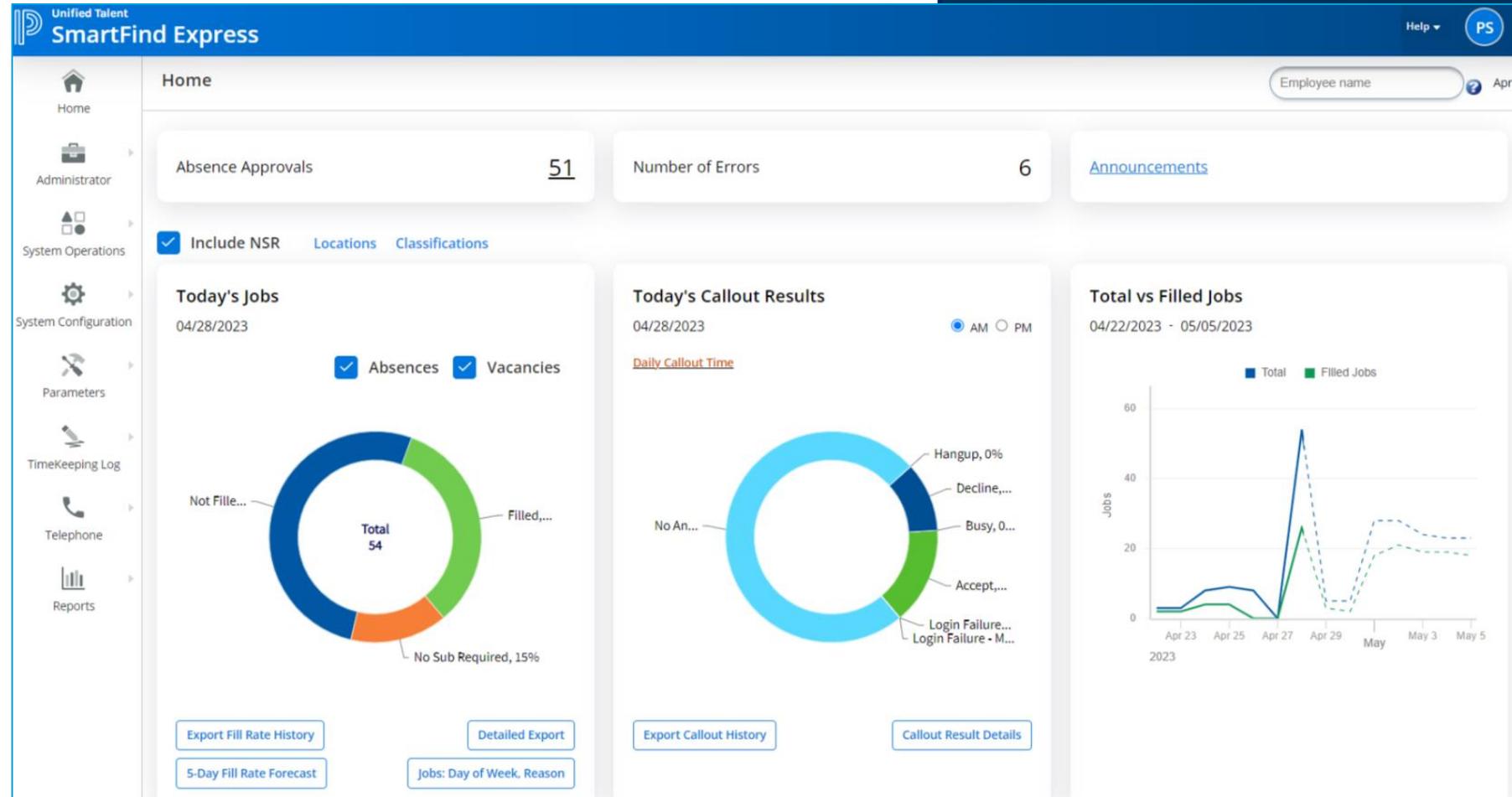
# SmartFind Express

## Actionable Admin Dashboards

Target Release: June 2023

### Highlights:

- Admins can quickly identify actions to take – jobs not filled
- Drill downs to jobs inquiry page for quick access to details
- Employee search saves time getting to staff profiles\*



\* Future release

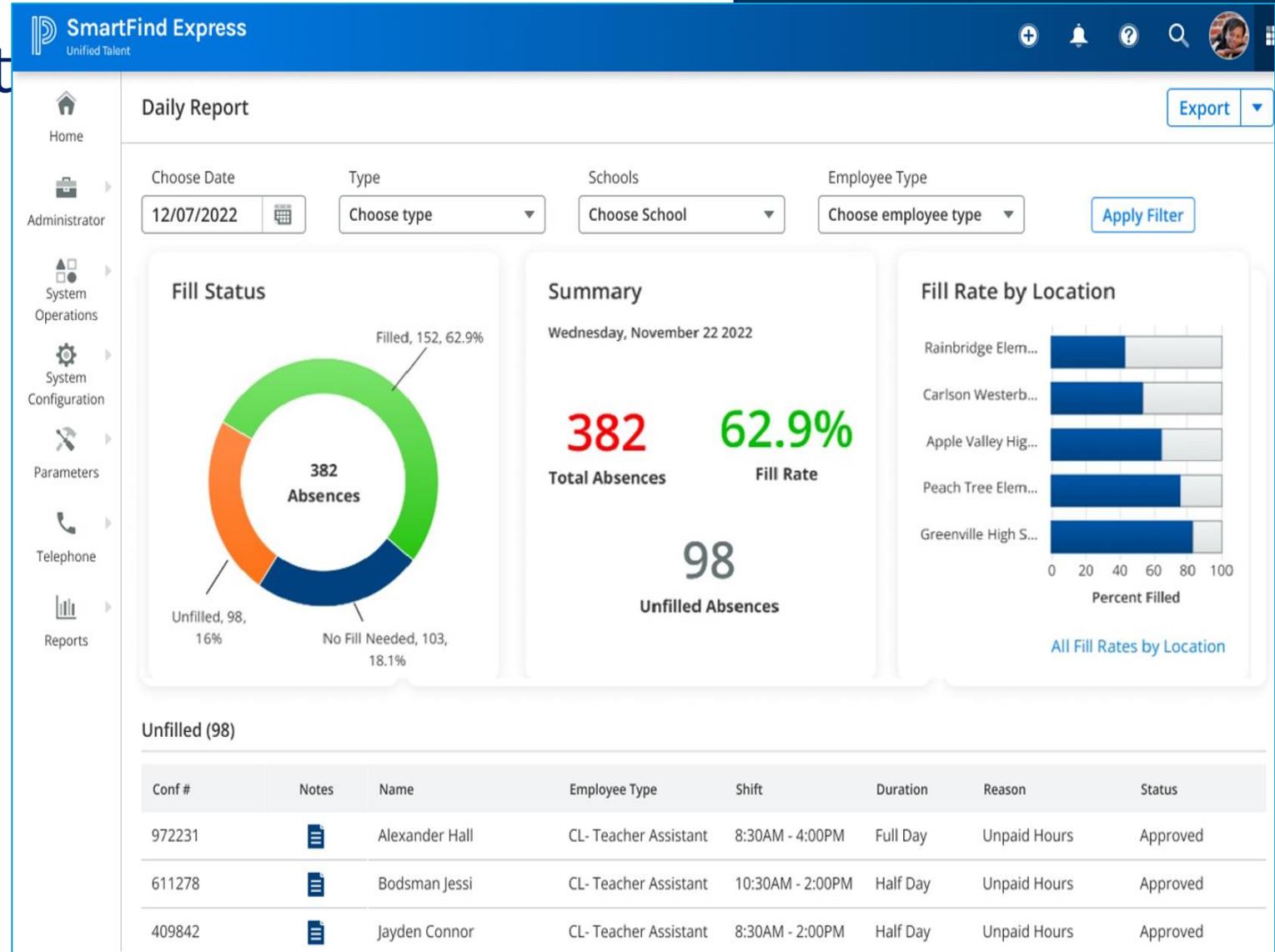
# SmartFind Express

## Reporting enhancement

Target Release - June 2023

### Highlights:

- Visibility into fill rate trends across locations
- Detailed insights into jobs not filled
- Improved reporting
  - Date ranges
  - Filters (locations, employee type)
- Jobs' view for better visibility and quick actions on unfilled job



# SmartFind Express

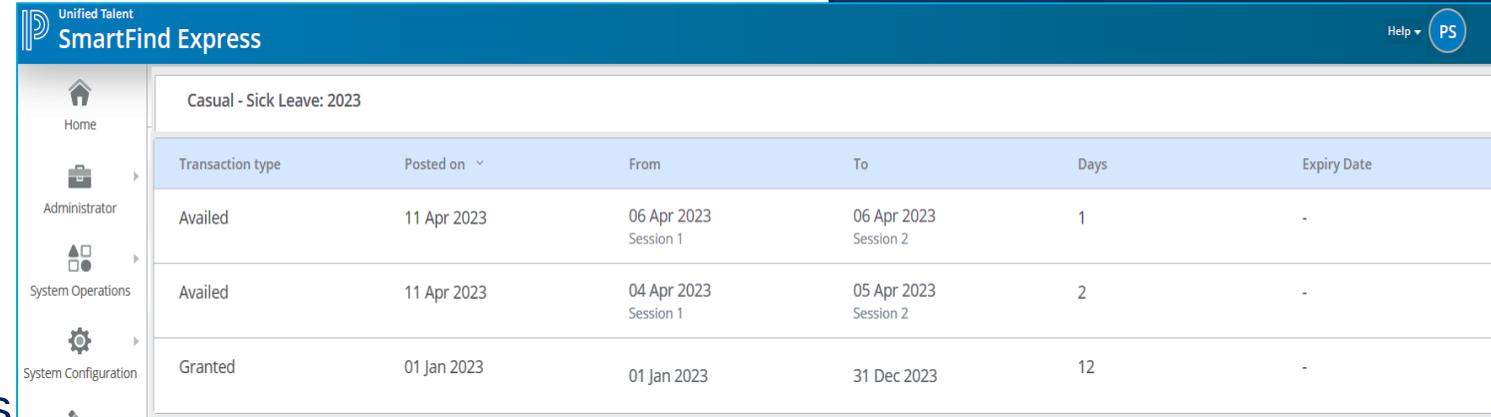
## Enhanced Reason Balance processes

*Target Release - Summer 2023*

### Audits & Accruals

#### Highlights:

- Audit trail on reason balances tracks changes (accruals, absences taken/canceled)
- Set future reason balance accruals
  - Weekly/monthly
  - Specific increments at future dates



The screenshot displays the 'SmartFind Express' interface within the 'Unified Talent' system. The main content area shows a table titled 'Casual - Sick Leave: 2023'. The table has columns for 'Transaction type', 'Posted on', 'From', 'To', 'Days', and 'Expiry Date'. The data rows show three transactions: two 'Avalied' transactions on 11 Apr 2023 and one 'Granted' transaction on 01 Jan 2023.

Transaction type	Posted on	From	To	Days	Expiry Date
Avalied	11 Apr 2023	06 Apr 2023 Session 1	06 Apr 2023 Session 2	1	-
Avalied	11 Apr 2023	04 Apr 2023 Session 1	05 Apr 2023 Session 2	2	-
Granted	01 Jan 2023	01 Jan 2023	31 Dec 2023	12	-

# SmartFind Express

## Substitute communication and feedback

Discovery

### Highlights:

- Substitutes can ask questions to employee to improve preparation
- Web and mobile support
- Push alerts on mobile app when new communications
- Employees can give feedback to substitutes after the job

The screenshot displays the SmartFind Express interface, which is divided into two main sections: Job Search and Job Details. A 'Communications' window is overlaid on the Job Search section, showing a conversation between a substitute and an employee.

**Job Search Section:**

- Available
- Job ID: 12345
- Status: Open
- Week: Tuesday
- Job ID: 12346

**Communications Window:**

**Alexa, Georgia**

I will be substituting for you. Is there any additional instruction that I should be aware of?

I have added additional instructions to the job. You can go through them.

Thanks, the instructions are extremely useful.

Thanks for clarifying all my questions. Lastly, can I know if I bring any additional books with me?

Buttons: Cancel, Submit

**Job Details Section:**

- Job Dates: Oct. 23, 2019 – Nov. 25, 2019 (31 Days)
- Class Information: Algebra II
- Teacher: Alexa, Georgia
- Period 1: 8:00 AM - 8:45 AM
- Instructions: Voice Instructions (PLAY), Text Instructions (VIEW), Attachments (DOWNLOAD), Communication (VIEW)

# SmartFind Express

## Multi-district support for substitutes

Discovery

### Highlights:

- Substitute can view available jobs across multiple districts
- Substitute tasks can be done at district or multi-district level
- Districts have more accurate insights into substitute availability.

The screenshot shows the SmartFind Express interface. The top navigation bar includes the logo, 'Unified Talent SmartFind Express', and user information. The main content area is titled 'Job Search' and shows a list of available jobs. A filter sidebar on the left is currently empty. The job list table has the following columns: Date, Time, Duration, Employee, District, Classification(s), Location(s), Decline, and Accept. The 'District' column is highlighted with a red box. The jobs listed are:

Date	Time	Duration	Employee	District	Classification(s)	Location(s)	Decline	Accept
Fri - Mon 04/28/2023 05/08/2023	09:00 AM 05:00 PM	Full Day	Lee, Brett	District A	Classification A	Remote Location A	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Mon - Fri 05/01/2023 05/05/2023	08:00 AM 07:00 PM	Full Day	Blewet, Greg	Test District	ZZ Test Classification	:Z TEST LOCATION 999999	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Wed - Wed 05/03/2023 05/17/2023	08:00 AM 07:00 PM	Full Day	Cronje, Stephen	District A	Classification A	Location A	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Thursday 05/11/2023	10:00 AM 12:00 PM	Full Day	Matthews, Angelo	District B	Classification B	Location B	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Wednesday 05/17/2023	10:00 AM 12:00 PM	Full Day	Dale, Adam	District B	Classification B	Location B	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Friday 05/26/2023	10:00 AM 12:00 PM	Full Day	Hick, Adam	Test District	ZZ Test Classification	ZZ TEST LOCATION 999999	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Wednesday 06/14/2023	10:00 AM 12:00 PM	Full Day	Michaels, John	Test District	ZZ Test Classification	ZZ TEST LOCATION 999999	<input type="checkbox"/>	<input checked="" type="checkbox"/>



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