

**Welcome to the Unified Talent
PowerSchool PowerUps!**



May 2023

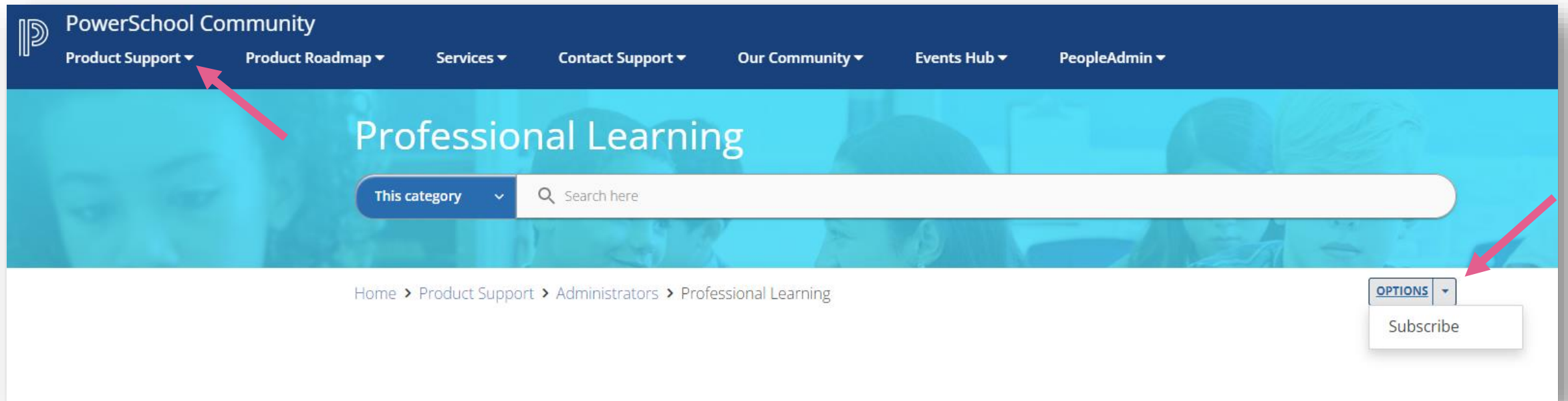
Today's Agenda

- Welcome
- Subscribing to Community Pages
- Breakout Rooms
 - Applicant Tracking
 - Perform
 - Professional Learning
 - SmartFind Express



Subscribing to Community Pages

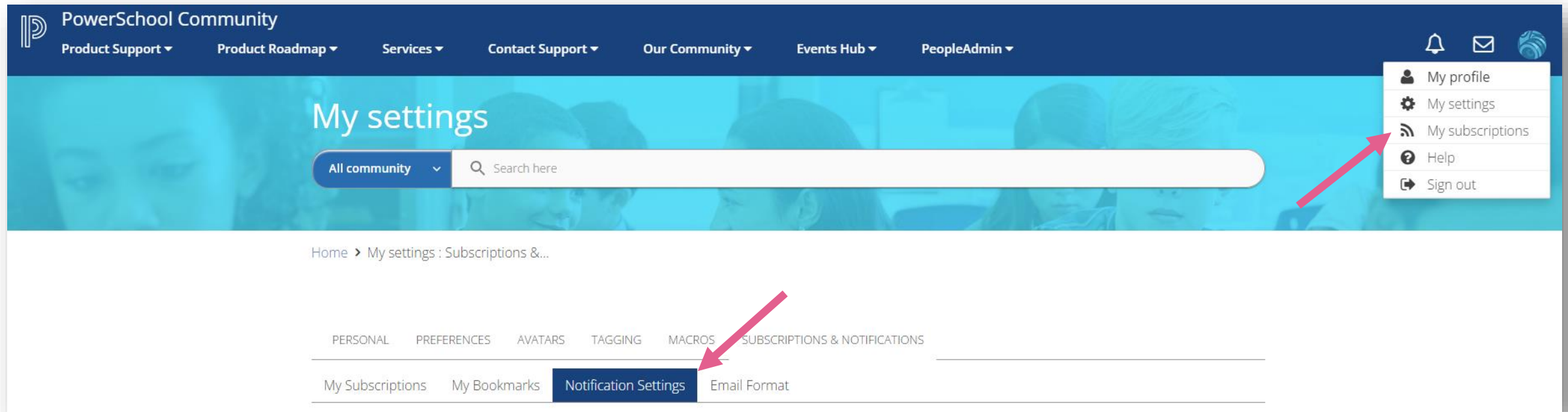
- Subscribing allows you to receive updates for pages that you are interested in



The screenshot shows the PowerSchool Community website interface. At the top, there is a dark blue navigation bar with the PowerSchool logo and several menu items: Product Support, Product Roadmap, Services, Contact Support, Our Community, Events Hub, and PeopleAdmin. A red arrow points to the 'Product Support' menu item. Below the navigation bar is a large blue banner with the text 'Professional Learning'. Underneath the banner is a search bar with a dropdown menu set to 'This category' and a search input field labeled 'Search here'. Below the search bar is a breadcrumb trail: Home > Product Support > Administrators > Professional Learning. In the bottom right corner of the page, there is an 'OPTIONS' dropdown menu with a red arrow pointing to it, which has opened to show a 'Subscribe' button.

Subscription Notification Settings

- Notification Settings allow you to customize the frequency of the updates you receive



The screenshot displays the PowerSchool Community user interface. At the top, a dark blue navigation bar contains the PowerSchool logo and links for Product Support, Product Roadmap, Services, Contact Support, Our Community, Events Hub, and PeopleAdmin. On the right side of this bar are icons for notifications, email, and a user profile. Below the navigation bar is a light blue banner with the text 'My settings' and a search bar. A dropdown menu is open on the right, listing 'My profile', 'My settings', 'My subscriptions', 'Help', and 'Sign out'. A red arrow points from the 'My subscriptions' option in the dropdown to the 'SUBSCRIPTIONS & NOTIFICATIONS' tab in the settings menu below. The settings menu includes tabs for PERSONAL, PREFERENCES, AVATARS, TAGGING, MACROS, and SUBSCRIPTIONS & NOTIFICATIONS. Under the 'SUBSCRIPTIONS & NOTIFICATIONS' tab, there are four sub-options: My Subscriptions, My Bookmarks, Notification Settings (which is highlighted with a dark blue background), and Email Format. A second red arrow points from the 'Notification Settings' sub-option to the 'Notification Settings' link in the sub-menu.

Your Talent Education Impact Consultant Team



Sean Vair

Experience:

Classroom Teacher / Dept Coord
11 Years

Educational Technology
8 Years

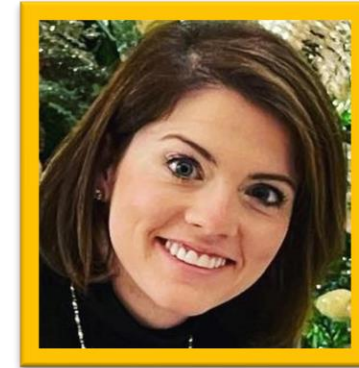


Stuart Aron

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

Applicant Tracking

- Customizing Employment History Verification

Professional Learning

- New PD Administration

Perform

- Best Practices for Closing Out the Evaluation Cycle

SmartFind Express

- Looking Under the Hood for Next Year: Reviewing System Parameters

Applicant Tracking

Customizing Employment History Verification

Agenda

- 1 Welcome
- 2 Overview
- 3 Setup Process
- 4 Sending & Reviewing Verifications
- 5 Demo

Overview

Purpose

- Send Employment History Verification to prior employers
- Can be done automatically or be prompted
- 1 or More Custom Forms

Uses

- Compliance
- Salary Verification
- Improve Efficiency with current processes

Overview

Current Processes

- Do you currently verify Employment History?
- Is your process manual, or automatic?
- Do you use a form, phone call, or other method to verify?
- Do you have to meet specific employment verification requirements?

Setup Process

Support Case

Custom Forms

- Required: Employment History Forms
- Optional: Custom Application Forms

Application

Job Posting

Support Case

- Submit a **Support Case** requesting **Employee History Verification** to be enabled in your district site
- Once set up, an **Overnight Process** is needed for the change to apply to your site

Custom Forms

- At least one form is required in **“Employment History Forms”**
- Additional forms can optionally be added in **“Custom Application Forms”**

EMPLOYMENT HISTORY FORMS

Employment History Form

Description	Last Published	Last Published by	Enabled	Exchange	
<input type="checkbox"/> Employment History Verification	04/26/2023 09:22 AM	TalentEd Support	Yes	No	PREVIEW CLONE EDIT

[Delete](#) [NEW EHV FORM](#)

CUSTOM APPLICATION FORMS

These forms will appear as new application types if they are enabled.

Description	Last Published	Last Published by	Enabled	Exchange	
<input type="checkbox"/> Applicant Employee History Verification	04/26/2023 10:48 AM	TalentEd Support	Yes	No	PREVIEW CLONE EDIT
<input type="checkbox"/> Certification Request	Not Published		No	No	PREVIEW CLONE EDIT
<input type="checkbox"/> Custom Application Page Example	02/17/2010 6:39 PM		Yes	No	PREVIEW CLONE EDIT

[Delete](#) [NEW CUSTOM APPLICATION FORM](#)

Employment History Forms

Verification of years of experience

Compliance checks, misconduct

Tenure transfer

Sick day transfer



Custom Application Forms

You may want to have a more detailed acknowledgement

Opportunity to explain to applicants that uploading a resume is not a sufficient replacement for filling out the Employment History form

Explain your process for sending verifications



Application Setup

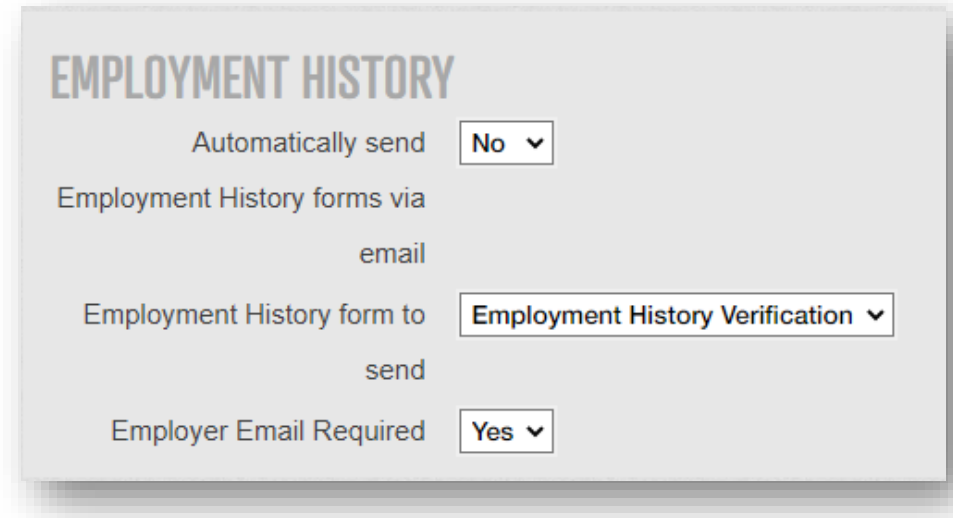
- **Edit** each **Application** that you want to add this new process to
- There may be an existing **Employment History** form. You will want to **Disable** the old one and **Enable** the new one
- Customize the new Employment History **Title & Disclosure** as needed
- **Publish** changes when ready to make this change

The screenshot shows the 'EDIT APPLICATION' interface for an application titled 'Certified'. It features a table of application pages with columns for Page Title, Last Modified, Modified By, and Enabled. The 'Employment History' page (row 7) is highlighted with a red box, and its 'EDIT' button is also highlighted. The 'PUBLISH ALL CHANGES' button at the bottom right is also highlighted with a red box.

	Page Title	Last Modified	Modified By	Enabled	
<input type="checkbox"/>	1 ▼ Personal Information	03/07/2017 2:54 PM	TalentEd Support	Yes	PREVIEW DISABLE EDIT
<input type="checkbox"/>	2 ▼ ▲ Background Information	09/23/2015 4:35 PM	TalentEd Support	Yes	PREVIEW DISABLE EDIT
<input type="checkbox"/>	3 ▼ ▲ Education	09/23/2015 4:41 PM	TalentEd Support	Yes	PREVIEW DISABLE EDIT
<input type="checkbox"/>	5 ▼ ▲ Job Skills	09/23/2015 4:56 PM	TalentEd Support	Yes	PREVIEW DISABLE EDIT
<input type="checkbox"/>	6 ▼ ▲ References	09/23/2015 4:56 PM	TalentEd Support	Yes	PREVIEW DISABLE EDIT
<input type="checkbox"/>	7 ▼ ▲ Employment History	04/26/2023 08:55 AM	TalentEd Support	No	PREVIEW ENABLE EDIT
<input type="checkbox"/>	8 ▼ ▲ Employment History	05/08/2023 8:28 PM	TalentEd Support	Yes	PREVIEW DISABLE EDIT
<input type="checkbox"/>	9 ▼ ▲ Cover Letter	05/08/2023 8:28 PM	TalentEd Support	Yes	PREVIEW DISABLE EDIT
<input type="checkbox"/>	10 ▼ ▲ Attachments	05/08/2023 8:28 PM	TalentEd Support	Yes	PREVIEW DISABLE EDIT

Job Posting Options

- Employment History Verification
 - Option to **Send Automatically**
 - Depends on your district processes
 - **Choose which Form** will go out if sending automatically
 - Can customize per job posting
 - **Employer Email Required**
 - Best practice is to require even if you are not planning to send automatically



The screenshot shows a settings panel titled "EMPLOYMENT HISTORY" with three configuration options:

- Automatically send**: A dropdown menu currently set to "No".
- Employment History forms via email**: A dropdown menu currently set to "Employment History Verification".
- Employment History form to send**: A dropdown menu currently set to "Employment History Verification".
- Employer Email Required**: A dropdown menu currently set to "Yes".

Sending & Reviewing EHV Forms

- Employment History Verification can be reviewed in the VERIF tab of the applicant's blue folder
- Here you can:
 - Add & edit employers
 - Manually send forms
 - View completed forms
 - Send reminders

PROFILE UPDATED: 05/05/23 CID# 17 PID# 1020

Jen Franklin
Middle School Math Teacher

EMAIL RED FLAG INTERNAL BEGIN HIRE PROFILE

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

EMPLOYMENT HISTORY FORMS

<input type="checkbox"/>	Employer ▼	Form	Form Complete	Date Requested	
<input type="checkbox"/>	Mountain River Unified School District	Certified Verification	05/08/2023	05/08/2023	REVIEW
<input type="checkbox"/>	Mountain River Unified School District	Employment History Verification	05/03/2023	05/03/2023	REVIEW
<input type="checkbox"/>	Apple Grove School District	Employment History Verification	No - Remind	05/03/2023	REVIEW

REMOVE SELECTED

PAST EMPLOYERS

<input type="checkbox"/>	Employer ▼	Consent to Contact	Requested	Start Date	End Date		
<input type="checkbox"/>	Sandy Beach ISD		No	01/2023	02/2023	⊗	REQUEST EDIT
<input type="checkbox"/>	Mountain River Unified School District		Yes (2)	01/2023	02/2023	⊗	REQUEST EDIT
<input type="checkbox"/>	Apple Grove School District	Yes	Yes (1)	01/2023	02/2023	⊗	REQUEST EDIT

REQUEST SELECTED NEW EMPLOYER

Demo



PowerSchool

Perform

Best Practices for Closing Out the Evaluation Cycle

Agenda

- 1 Reporting
- 2 Marking Processes Complete
- 3 Making Process Changes
- 4 Export
- 5 Q&A

Reporting



HELPS TRACK EVALUATION
AND TASK COMPLETION



CAN IDENTIFY
SIGNATURES NEEDED



SHOW INCOMPLETE
FORMS BY BUILDING

Marking Processes Complete



Does not physically complete tasks, therefore they remain editable



Turns off any reminders for overdue tasks



Locks the process and the form so any updates that are propagated do not change currently – assigned processes

Making Process Changes

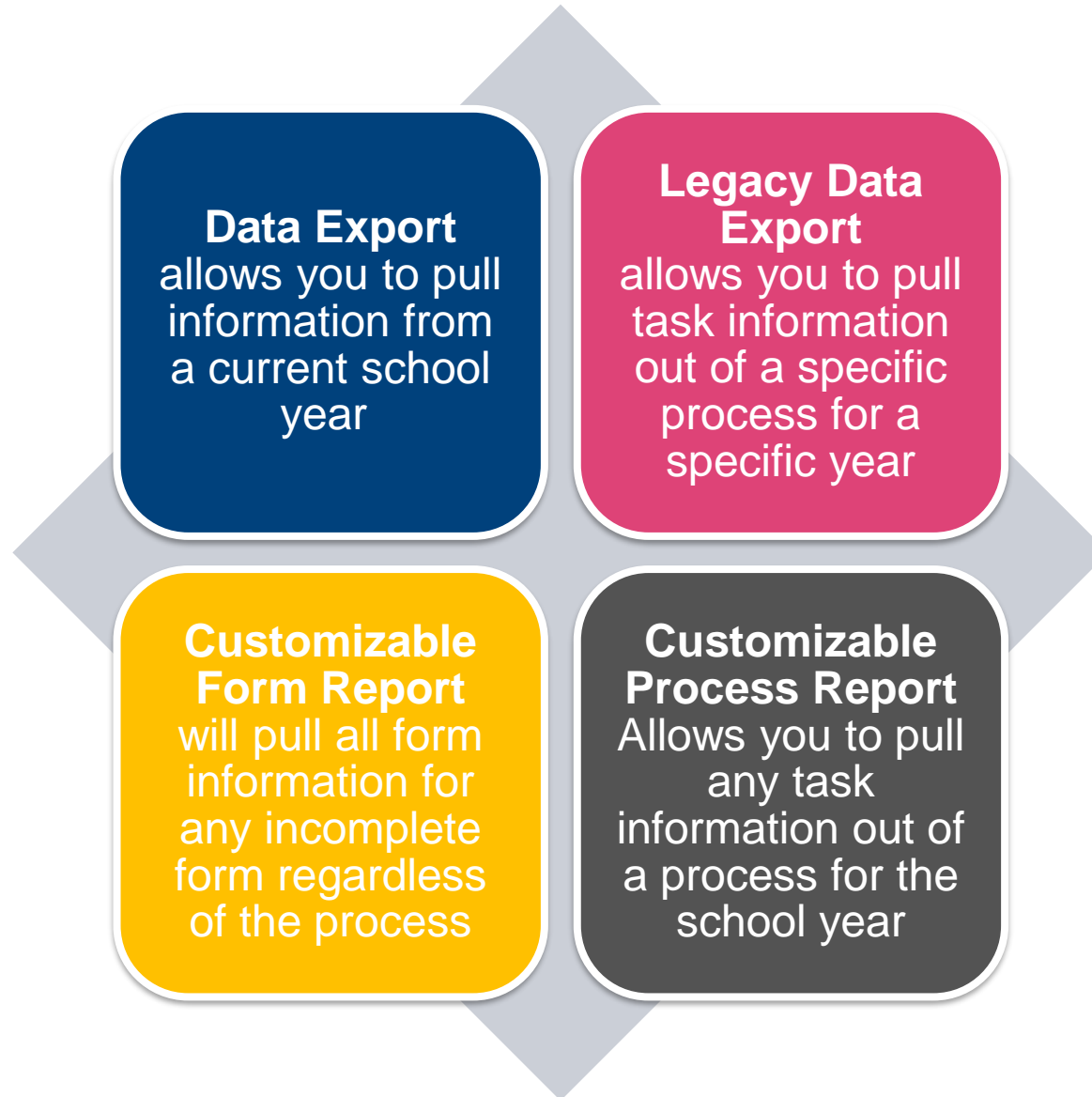
You can

- Change forms
- Add tasks
- Make changes to tasks

Try to avoid

- Deleting Tasks
 - Forms been unopened by anyone you should be good to delete
 - Once there is a database entry (someone opens and saves progress) it will remain in process

Export



Why use Exports?



Legacy Data Export – Can export total values for Teacher Incentive Allotment or other district allotment programs.



Customizable Form Report - You can monitor overall performance if teachers are receiving multiple observations in the same year



Customizable Process Report - Can use for compliance reporting for the state if there are several tasks in a process that have data that need to be reported on

Let's Explore!





PowerSchool

Professional Learning

New PD Administration

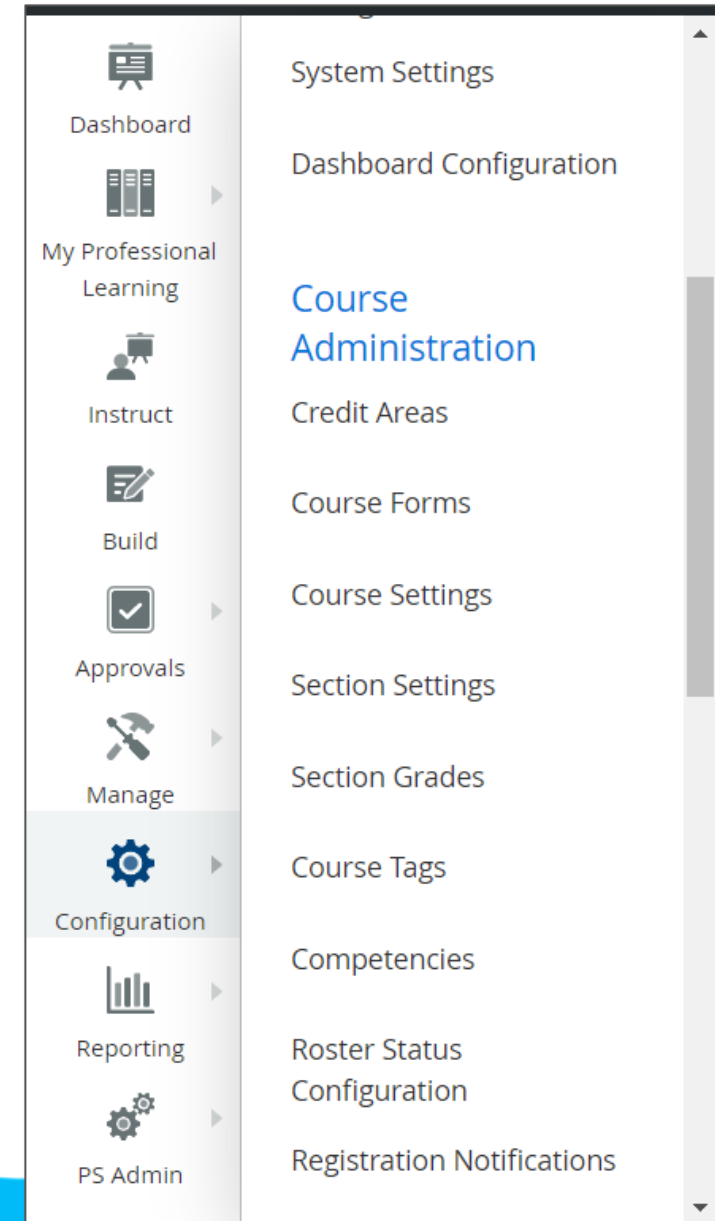
Upgrading to the *New* Professional Learning Administration

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.

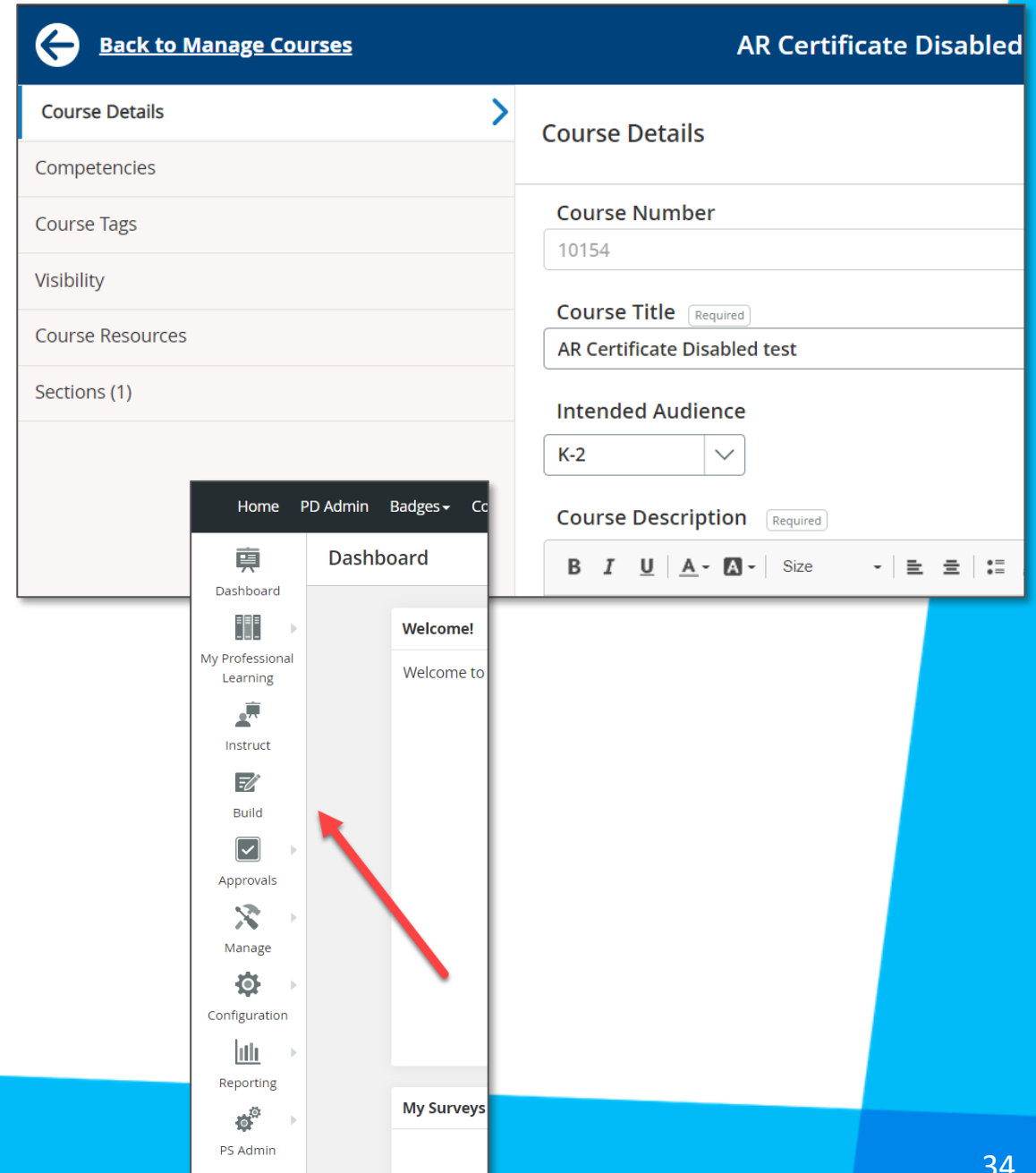


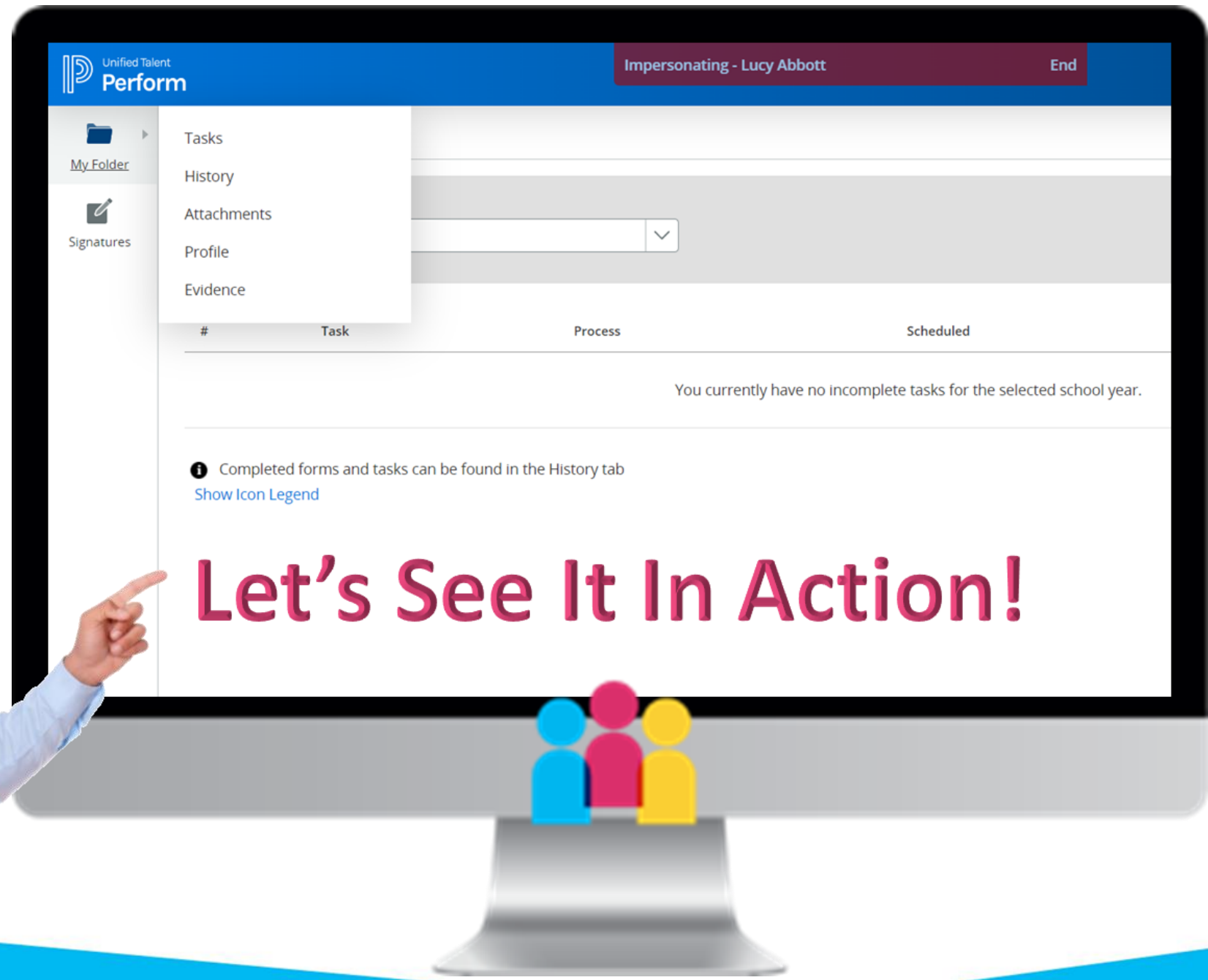
The *New* Professional Learning

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.





Demo Areas

- Course Creation
- Course Approval
- Roster
- General Configuration
- Reporting

Process of Migration

How & When Will I Get the New PL?

1. Customer attends Migration Kickoff meeting
2. Customer completes Pre-Migration Checklist
3. PowerSchool provides a Pre-Migration training
4. PowerSchool turns on the new interface and runs scripts to migrate previous settings
5. Customer completes Post-Migration Checklist
6. PowerSchool provides a Post-Migration training
7. PowerSchool provides robust, detailed, and accessible documentation to use with affected users throughout



Optional Migration Packages

- If desired, customers can purchase additional support through our **Migration Packages:**
 - Basic
 - Guided
 - Comprehensive
- Interested? Contact ServicesSolutions@powerschool.com



The flyer features the PowerSchool Professional Services logo at the top left. The main title is 'Unified Talent™ Professional Learning Migration Packages'. Below the title is a paragraph explaining that districts can benefit from the Strategic Solutions Consulting (SSC) team's services during migration. A 'USER ROLES' section lists five roles with corresponding icons: Office Super Users (OU), Super Users (SU), District/Site Administrators (DA), Office Administrators (OA), and Current Course Creators/Approvers (CC). At the bottom, a navigation bar shows three levels: BASIC, GUIDED, and COMPREHENSIVE, with arrows indicating a progression from left to right. An icon of two computer monitors with arrows between them is located in the top right corner of the flyer.

PowerSchool | Professional Services

Unified Talent™ Professional Learning Migration Packages

With the migration from Legacy Professional Learning to the new user interface, districts may benefit from the consultative services of the Strategic Solutions Consulting (SSC) team. Our SSCs can assist with cross-walking the platforms, guiding new leadership teams, and advising on potential ways to improve current practice within the new system. **Three levels of services will be offered; please choose the package that best meets your needs:**

USER ROLES

- OU Office Super Users
- SU Super Users
- DA District/Site Administrators
- OA Office Administrators
- CC Current Course Creators/Approvers

BASIC → GUIDED → COMPREHENSIVE

Migration Packages Flyer

What is Migrated?

Areas of Migration

- Credit Areas
- Course and Section Forms
- User Roles and Permissions
- Offices
- Notification On/Off Status
- Course Approval Workflow
- Survey Settings
- Sign in Sheet Settings



Value: Office Super Users can now add/edit most areas.

Not Currently Supported

Features Not Currently Supported

- Many of these features are on the Product Roadmap for future releases
- Any district requiring one or more of these items would not be able to migrate at this time
- Payment Processor
- Room Management
- Components
- Office Credit Types
- Dynamic-based Approval Workflow



Are you currently using any of these features in your site?

Preparing for Migration

Migration Process

- Submit your desire to upgrade using this form:
<https://app.smartsheet.com/b/form/1983cc80847b43d7ae32a000e8b42f17>
- Cohorts will be built based on first submitted, needs, size of groups, etc.
- You must attend/commit to the following:
 - Kickoff meeting
 - Pre-Migration Training
 - Friday morning migration
 - Post-Migration Training



PowerSchool

SmartFind Express

Looking Under the Hood for Next Year:
Reviewing System Parameters

Agenda

- 1 What are Parameters
- 2 Parameter Audit Log
- 3 Parameter Tour
- 4 Q & A

What are Parameters/ Parameter Audit Log

- Parameters= Business Processes
- Business Process Review during implementation
- Good time to review
- How can you tell when changes were made?

Unified Talent SmartFind Express

Select Role: Administrator Employee Substitute November 29, 2022

System Parameter Audit Log

Search Criteria:

* Start Date: 09/01/2021 (MM/DD/YYYY)

* End Date: 11/29/2022 (MM/DD/YYYY)

Parameter ID:

Parameter Keyword:

Parameter Location:

Access ID:

Records Per Page: 50

Search Export to Excel

113 items found, displaying 1 to 50.
[FIRST / PREVIOUS] 1, 2, 3 [NEXT / LAST]

Parameter ID	Parameter Name	Parameter Location	Old Value	New Value	Modified By (Access ID)	First Name, Last Name	Modified Date
321	Show Location address details	General	0	1	1111	Operator 1111, PowerSchool Level 10	2022/11/18 05:49:22
229	Mobile Application Access	Mobile	1	0	1111	Operator 1111, PowerSchool Level 10	2022/10/12 12:45:04
29	Length of Budget code	General	33	1	1111	Operator 1111, PowerSchool Level 10	2022/10/10 02:51:10
109	All Jobs require a Budget code on Verification	General	0	1	1111	Operator 1111, PowerSchool Level 10	2022/10/10 02:49:28
285	Email-Assignment notice - Employee	Communications	0	1	1111	Operator 1111, PowerSchool Level 10	2022/10/10 10:17:32
171	Email-Assignment notice - Substitute	Communications	0	1	1111	Operator 1111, PowerSchool Level 10	2022/10/10 10:17:31
298	Email-Assignment notice - Administrator	Communications	0	1	1111	Operator 1111, PowerSchool Level 10	2022/10/10 10:17:31
569	Restrict modifications to allowed classifications list	Substitute	0	1	1111	Operator 1111, PowerSchool Level 10	2022/10/05 09:46:23
29	Length of Budget code	General	34	33	1111	Operator 1111, PowerSchool Level 10	2022/10/03 01:55:17
30	Maximum	General	34	33	1111	Operator 1111, PowerSchool Level 10	2022/10/03 01:55:17
29	Length of Budget code	General	36	34	1111	Operator 1111, PowerSchool Level 10	2022/10/03 01:54:07
30	Maximum	General	36	34	1111	Operator 1111, PowerSchool Level 10	2022/10/03 01:54:07
29	Length of Budget code	General	1	36	1111	Operator 1111, PowerSchool Level 10	2022/10/03 01:51:48
30	Maximum	General	45	36	1111	Operator 1111, PowerSchool Level 10	2022/10/03 01:51:48
445	Enable employee create absence form with allowed durations	Jobs	1	0	1111	Operator 1111, PowerSchool Level 10	2022/09/27 09:42:02
446	Full Day	Jobs	1	0	1111	Operator 1111, PowerSchool Level 10	2022/09/27 09:42:02
447	Morning Half Day	Jobs	1	0	1111	Operator 1111, PowerSchool Level 10	2022/09/27 09:42:02
448	Afternoon Half Day	Jobs	1	0	1111	Operator 1111, PowerSchool Level 10	2022/09/27 09:42:02
449	Custom	Jobs	1	0	1111	Operator 1111, PowerSchool Level 10	2022/09/27 09:42:02
462	Selected Report	Jobs	Rapport d'autorisation d'absence	Absence Authorization Report	1111	Operator 1111, PowerSchool Level 10	2022/09/27 09:42:02
633	Enable text message job offers for all substitutes	Substitute	0	1	1111	Operator 1111, PowerSchool Level 10	2022/08/22 03:00:13
633	Enable text message job offers for all substitutes	Substitute	1	0	1111	Operator 1111, PowerSchool Level 10	2022/08/15 01:05:57
633	Enable text message job offers for all substitutes	Substitute	0	1	1111	Operator 1111, PowerSchool Level 10	2022/08/09 12:31:39
13	Open Specified Jobs	General	30	1	1111	Operator 1111, PowerSchool Level 10	2022/08/04 01:13:01
445	Enable employee create absence form with allowed durations	Jobs	1	0	1111	Operator 1111, PowerSchool Level 10	2022/08/04 12:43:44

Parameter Tour

The screenshot shows the Unified Talent SmartFind Express interface. The left sidebar contains navigation icons for Home, Administrator, System Operations, System Configuration, Parameters, Telephone, Reports, and Startup. The Parameters menu is expanded, showing options: General, Jobs, Mobile, Telephone, Administrator, Employee, Substitute, Communications, and Timekeeping. A red arrow points to the Parameters icon in the sidebar.

Home

Welcome PowerSchool Internal Support Account

Number of Errors Reported on the System Activity Log today is 0.

Today's Jobs: 05/01/2023

Absences Vacancies **Locations** **Classifications**

Include NSR

Total Jobs	0
No Sub Required	0
Filled	0
Not Filled	0
Fill Rate	0.0 %

[Export Fill Rate History](#) [Detailed Export](#)

[5-Day Fill Rate Forecast](#)

Today's Callout Results: 05/01/2023

Daily Callout Time AM PM

Accept	0
Busy	0
Decline	0
Hangup	0
No Answer	0
Login Failure - Substitute Hang up	0
Login Failure - Max Attempts Reached	0

[Export Callout History](#) [Callout Result Details](#)

[Jobs: Day of Week, Reason](#) [Refresh Charts](#)

Total vs Filled Jobs
05/01/2023 - 05/01/2023

Number of Jobs

1.0
0.9
0.8
0.7
0.6
0.5
0.4
0.3
0.2

23.4.0.0 Release

Product Updates

Product Area	Type	Summary	Release Note
Reports	Improvement	New parameter to print employee reason balance totals in the report output	A new parameter has been added within Parameters → General → “Display reason balance totals on employee reason balance report (Recommended only when district employees have their reason balances only either in days or hours)”, defaulted as unchecked. When this parameter is checked, it will print the reason balance totals also on the report output of the employee reason balance report. As the parameter disclaimer suggests, it can only total when the district employees have their entire reason in one of the two units, either hours or days. It should not be used to total employee reason balances when it can possibly be hybrid scenario of certain reason balances in days and few in hours for the same employee.
Reports	Improvement	New parameter to show specific substitute date on today's available substitute report output	New parameter has been added to Parameters → General → “Display following date as additional column in today's available substitute report”, with a blank text field. When the specific substitute date field is entered and the parameter is checked, it would print the specific substitute date (from the individual substitute profiles) in a new column in today's available substitute report.

23.4.0.0 Release (Continued)

Profiles	Issue	Issue of substitutes ability to modify classification for their auto accept setting	Issue has been fixed where substitutes having auto-accept setting could not modify their existing classifications when the district setting for 'allow classifications modification' was off. The issue has been resolved that even when the mentioned district setting is off, the substitute can modify classifications for their auto accept setting from existing list of classifications on their profile.
Profiles	Issue	Sorting issue on start date on substitute unavailable dates list	Issue has been fixed to resolve the sorting issue on start date column for the substitute unavailable date list view , when the Admin/Operator view it from the substitute profile.

23.4.0.0 Release (Continued)

Reports	Improvement	External reason codes printed on job inquiry report	Enhancement has been done for the feature of external reason codes. When the parameter "Enable Reason Assignment to External Codes" is enabled, then the job inquiry report will also print the external reason name along with the reason name.
---------	-------------	---	--



PowerSchool