Welcome to the Unified Talent PowerSchool PowerUp!

Unified Talent

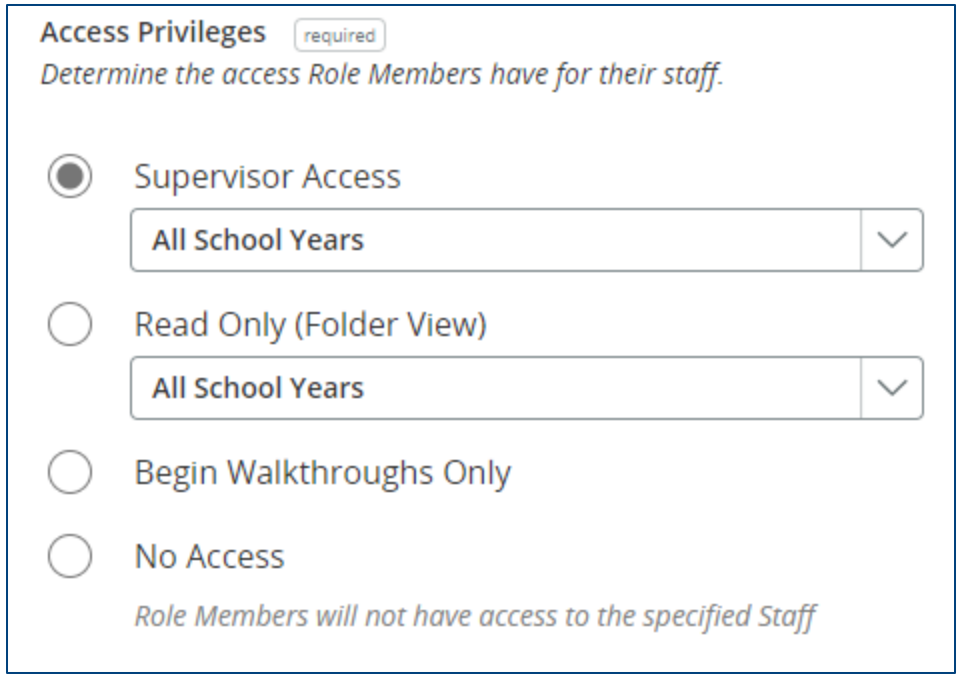
January 2024

Today's Agenda

- Welcome
- Finding Resources
  - Knowledge Base
  - Previous PowerUps
- Product Updates
  - Enhanced Roles Security in Perform
- Breakout Rooms
  - Applicant Tracking
  - Employee Records
  - Perform
  - Professional Learning

Enhanced Roles Security in Perform

- New option to grant access to **Current Year** or **All School Years** for Supervisor and Read Only access
- New option to allow **Begin Walkthrough Only** access for a specific group of individuals
- More information in the [PowerSchool Community]



Upcoming PowerUp on this topic in March

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
1.5 Years

Your Talent Education Impact Consultant Team

Edie Smith

Experience:

Administrative & Onboarding
2 Years

K-12 HR Software Administrator
4.5 Years

Education Technology
1 Year

Marissa Gonzalez

Experience:

Teacher and Specialist
9 Years

District Level
8 Years

Education Technology
2 Years

Breakout Room Topics

Applicant Tracking	• Configuring Application Types and Global Security Settings
Employee Records & Onboarding	• District Ticketing for Educator Support
Perform	• Utilizing Peer Processes for Coaching & Mentoring
Professional Learning	• New Features in Upgraded Administration

PowerSchool PowerUPs

Applicant Tracking

Configuring Application Types & Global Security Settings to Collect and Control Visibility of Data

Agenda

1. Application Types
2. Standard & Custom Pages
3. Global Security Settings
4. Previewing & Assigning
5. Q&A

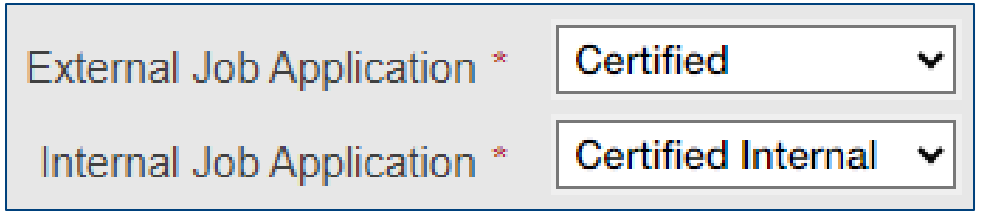
Application Types

- Target applications for the position
- Collect everything you need, and just what you need

Examples

- Certified
- Classified
- Internal – Certified
- Internal – Classified
- Contractual
- Substitute

- External Vs. Internal Job Applications



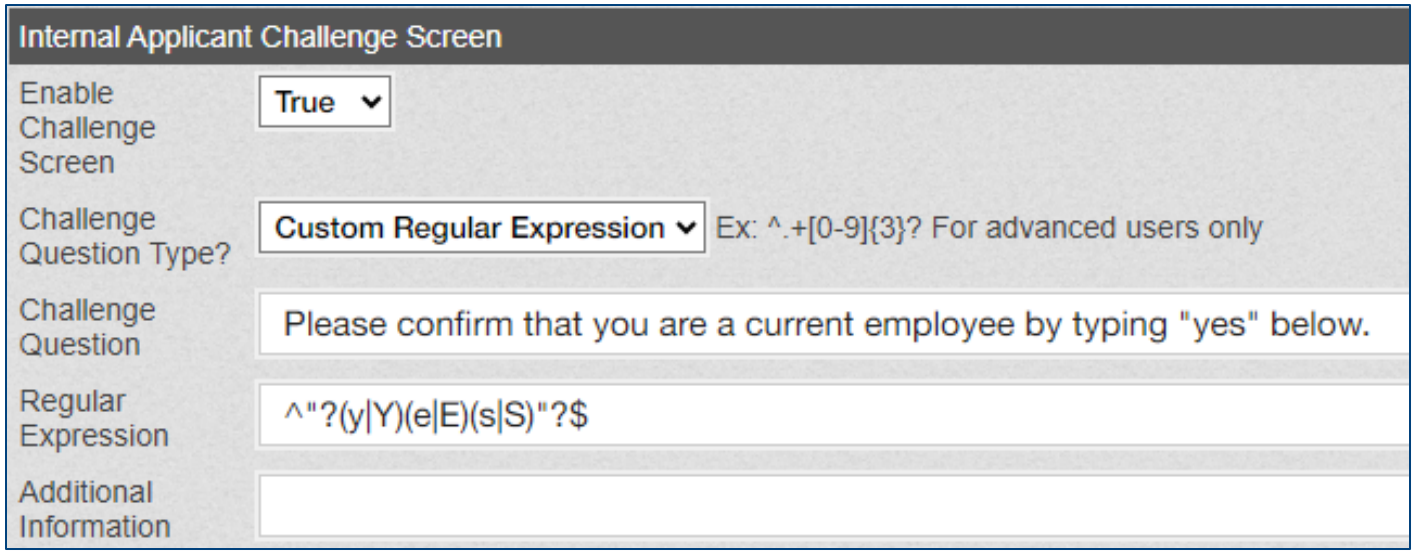
Application Types

- Controlling and Managing Internal Candidates
- Determines which Application Type a candidate completes

Manually

Automatically during Begin Hire

Self-Identification



Recent idea in the Ideas Portal – Scheduled for Future Release!

Standard & Custom Pages

Standard Pages

- Can be enabled or disabled in an application type
- Can edit some information such as title and order of sections on some forms
- Can enable or require questions on some forms
- Cannot edit questions
- Customizable features can be different per application type

Custom Pages

- Can be added, deleted, enabled, or disabled from an application type
- Can add, remove, require, and entirely customize questions and language on page
- Changes to a custom form will affect all applications that have that custom form

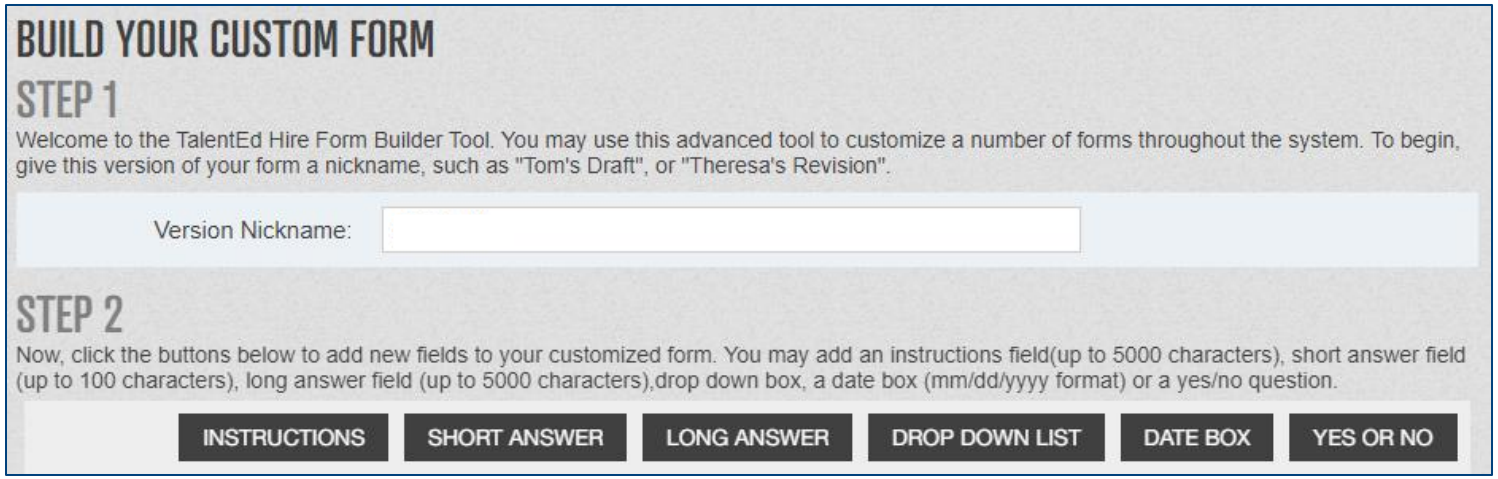
Customizing Standard Pages

- Edit Title(s)
- Customize dropdown lists
  - Building & Locations
  - Other
- Customize Page Layout
- Edit Section Title, order
- Enable, Disable, and/or Require Questions

Dropdown Lists

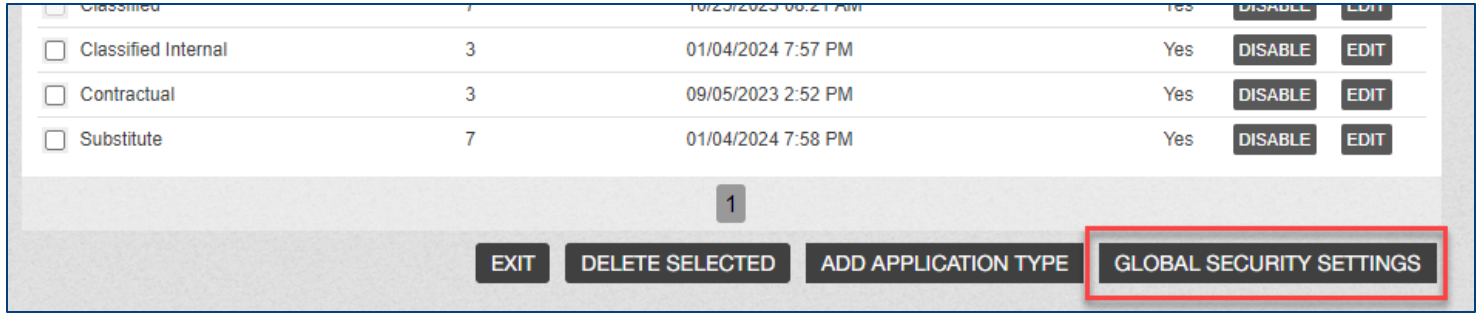
Creating & Adding Custom Pages

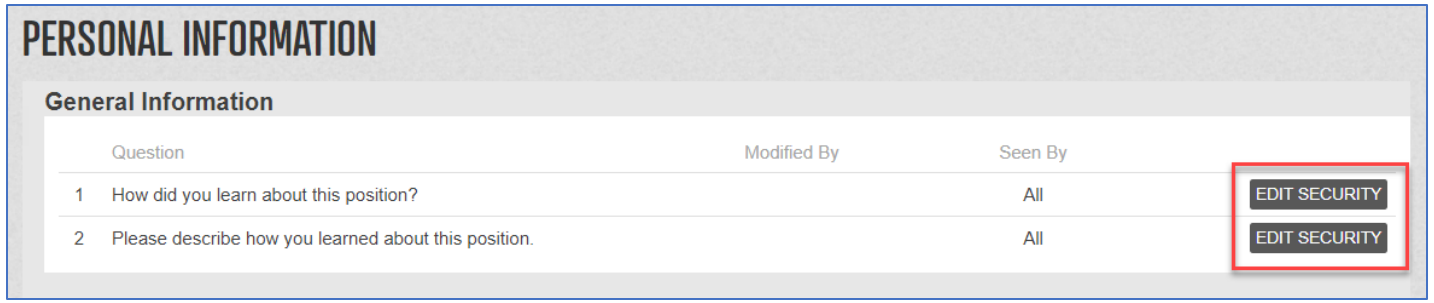
- Question Types:
  - Instructions
  - Short Answer
  - Long Answer
  - Dropdown List
    - Unique to this page
  - Date Box
  - Yes or No



Global Security Settings

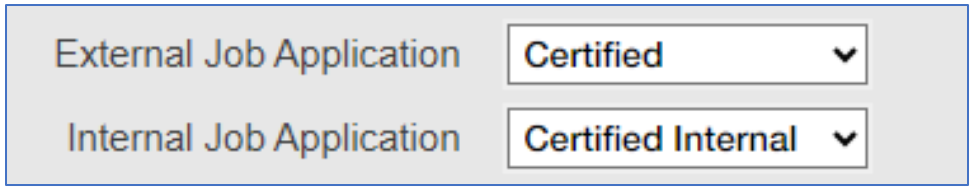
- Global Security Settings allow you to prevent items on applications from being seen by users in your system





Previewing & Assigning

- Make sure the application looks the way you expect
  - Preview – How the application will appear to the applicant
  - Print Preview – How the application will appear when printed
- Designating in a job template or in a job post



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Employee Records

District Ticketing for Educator Support

Things to Consider…

When might a ticketing form be useful?

- Supporting employee requests
- Direct request to the appropriate person
- Employee satisfaction and autonomy

Which form type should be used?

- Basic
- PowerSchool
- Mixed

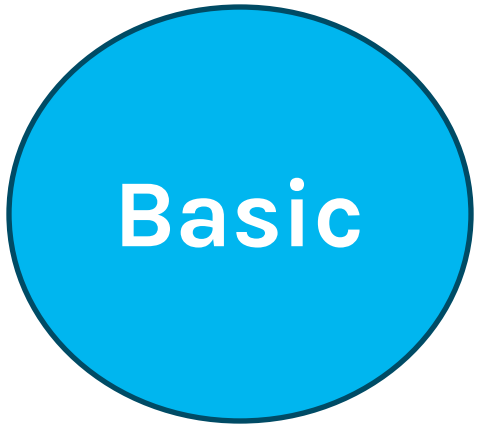
How should the form be structured?

- Section Headers
- Paragraphs
- Library Resources
- Other Question Types

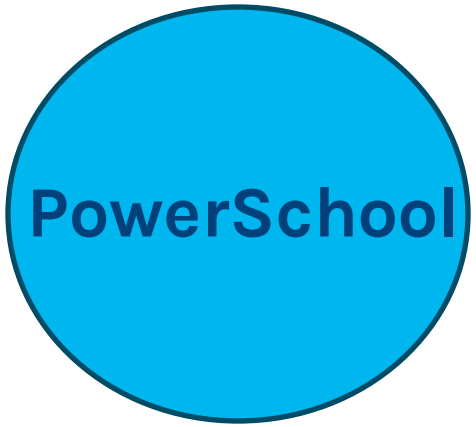
What should the workflow look like?

- Who should the ticket go to?
- Does the ticket need to be reviewed or approved?

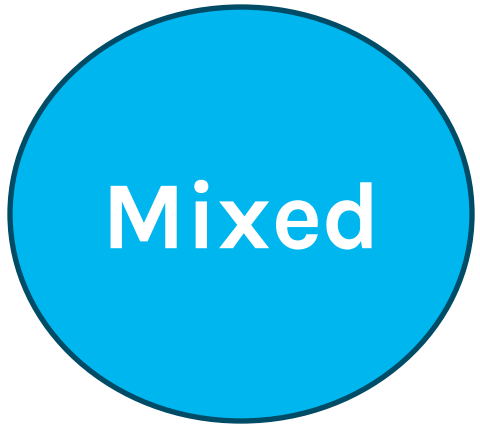
Types of Forms in Records



- Original forms supported by Records
- Consist of a single line of questions listed on the page



- A limited set of forms that PowerSchool maintains
- They cannot be altered by customers



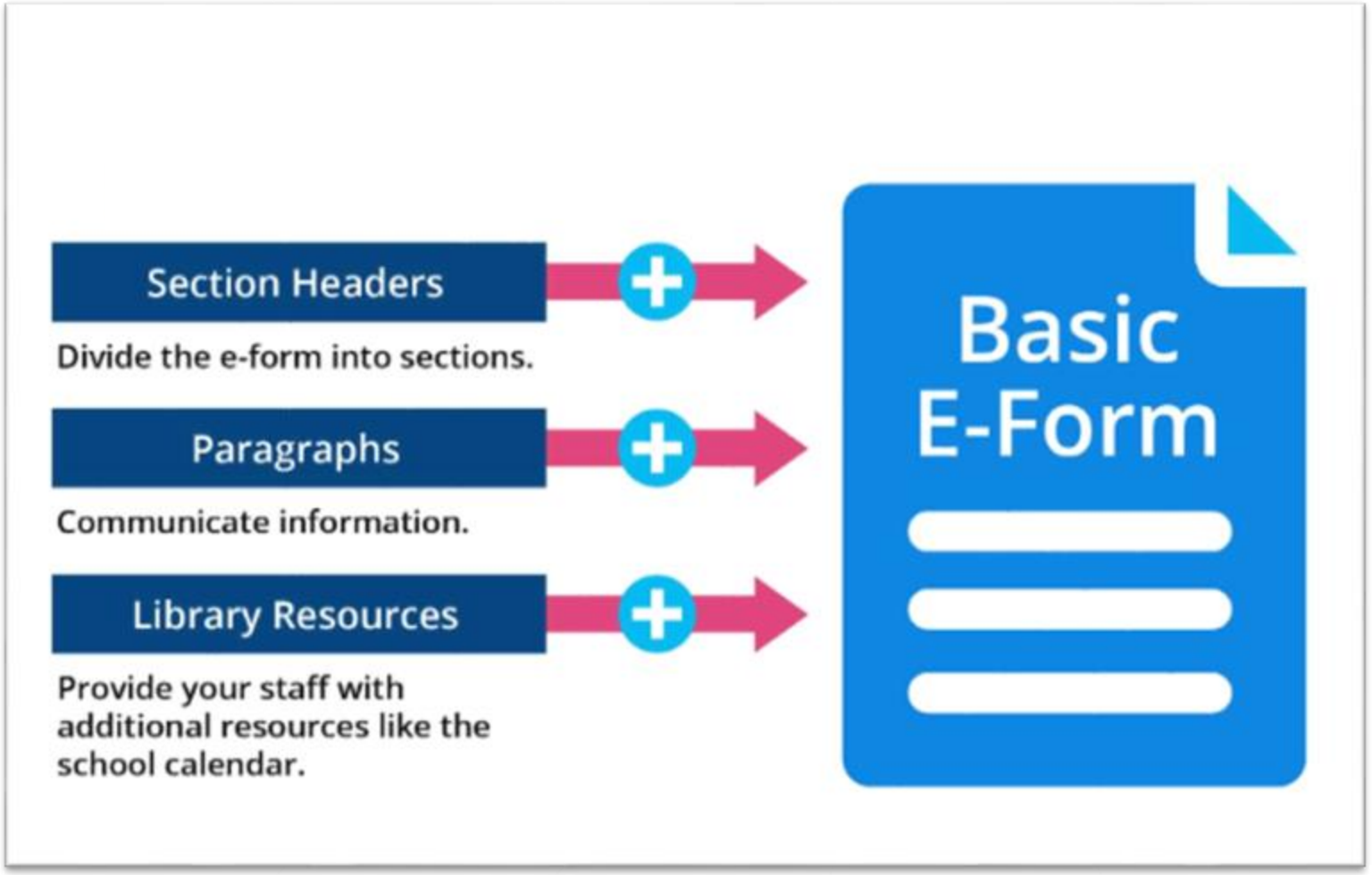
- Forms created by the Form Builder
- They generally consist of a PDF canvas with overlayed form fields

When to Use Each Form Type

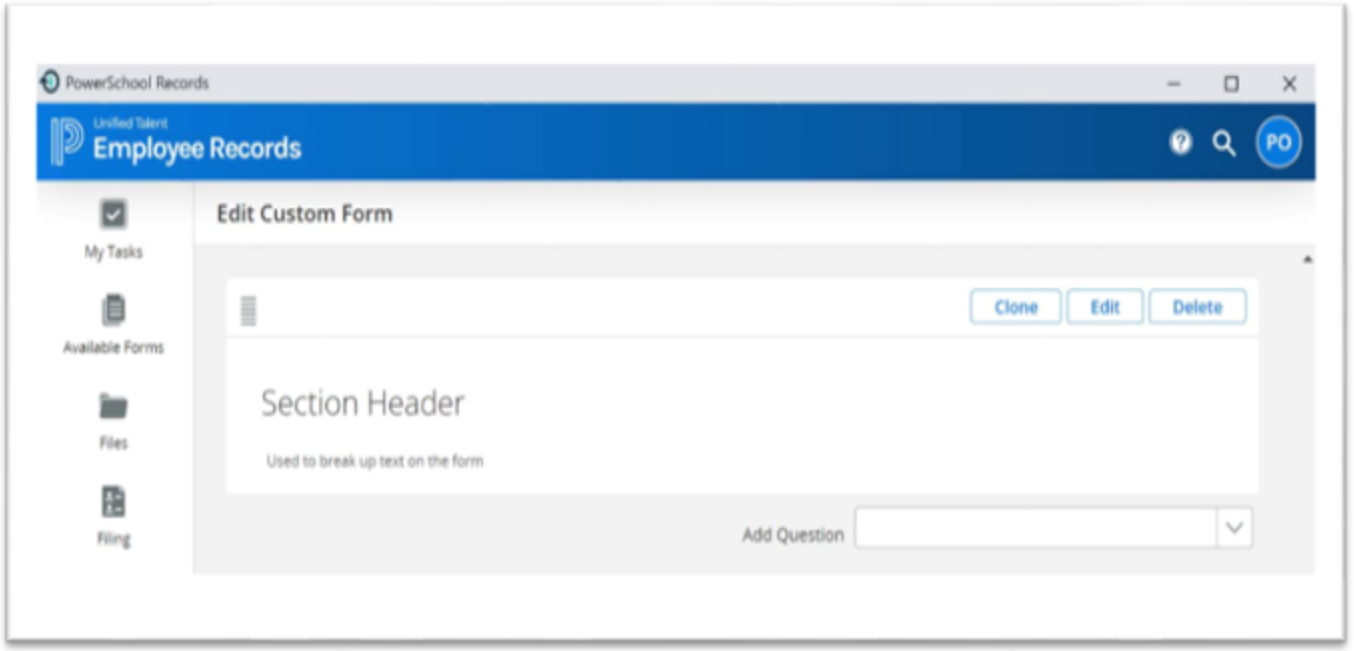
Best Practices - Basic vs. Mixed Forms

Use Basic Forms...	Use Mixed Forms...
When there is a need to embed video	For complex, formatted forms
For simple forms without a lot of form fields	For State Tax forms

Structuring a Basic Form

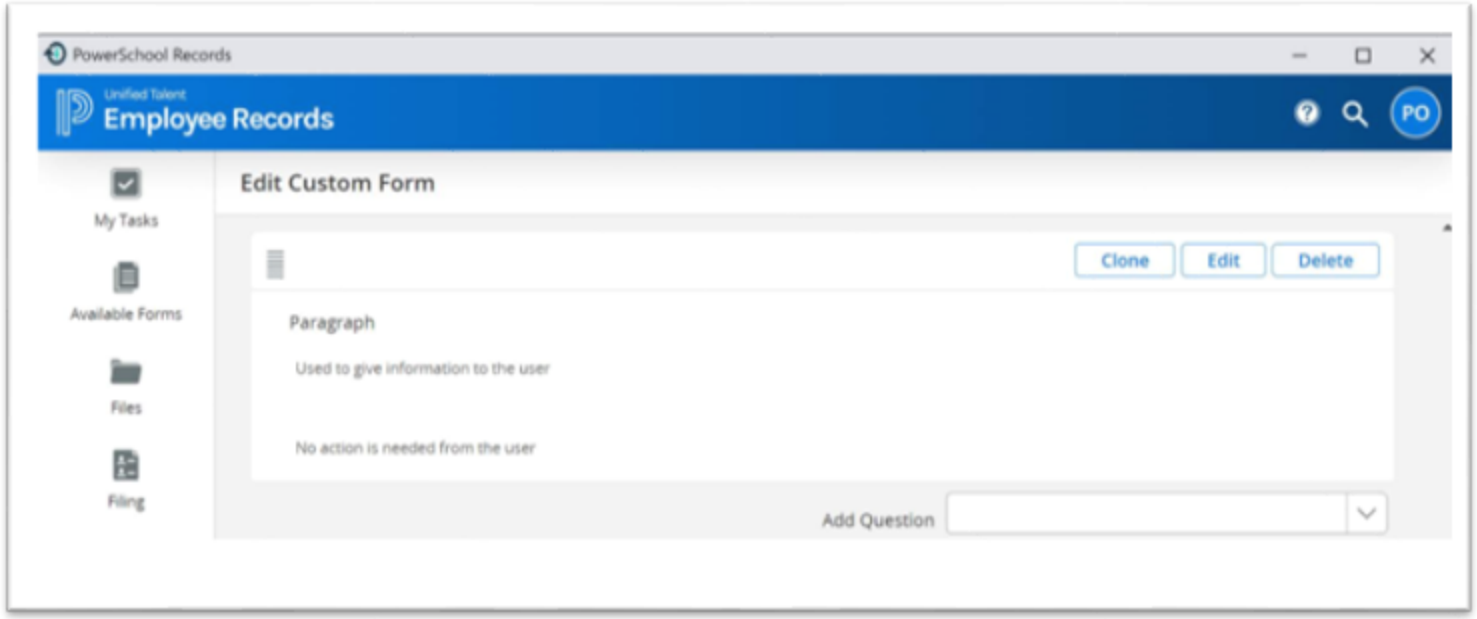


Structuring a Basic Form: Section Headers



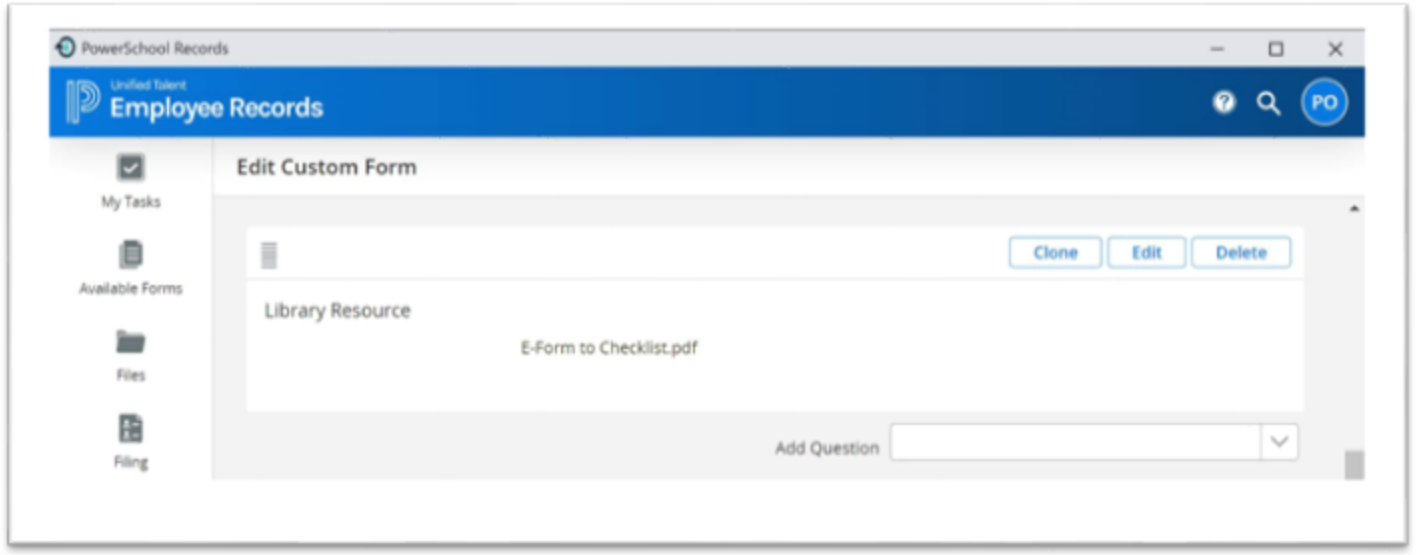
Use Section Header question types to create sections between questions, texts, or resources in basic e-forms

Structuring a Basic Form: Paragraphs



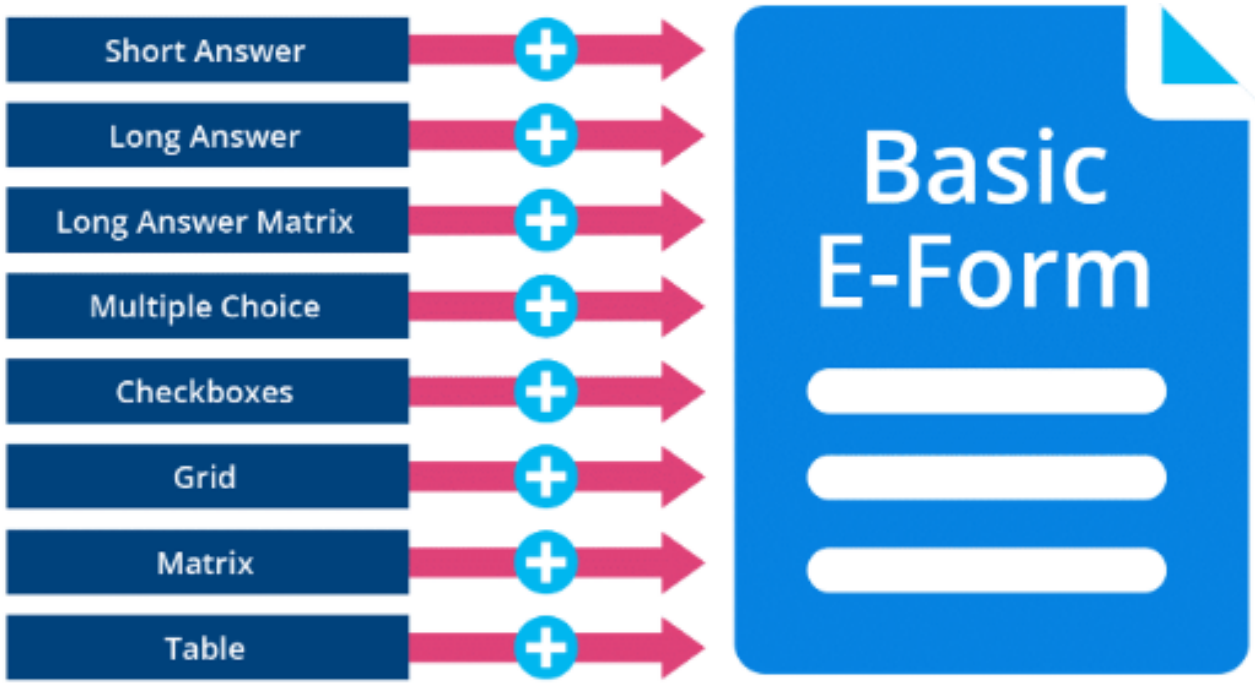
Use Paragraph question types to provide information for the employee when no other interaction is required

Structuring a Basic Form: Library Resources



- Use the Library Resources question types to post resources that employees need to access or use
- This can include PDF's handbooks, or any e-form you identify as resources

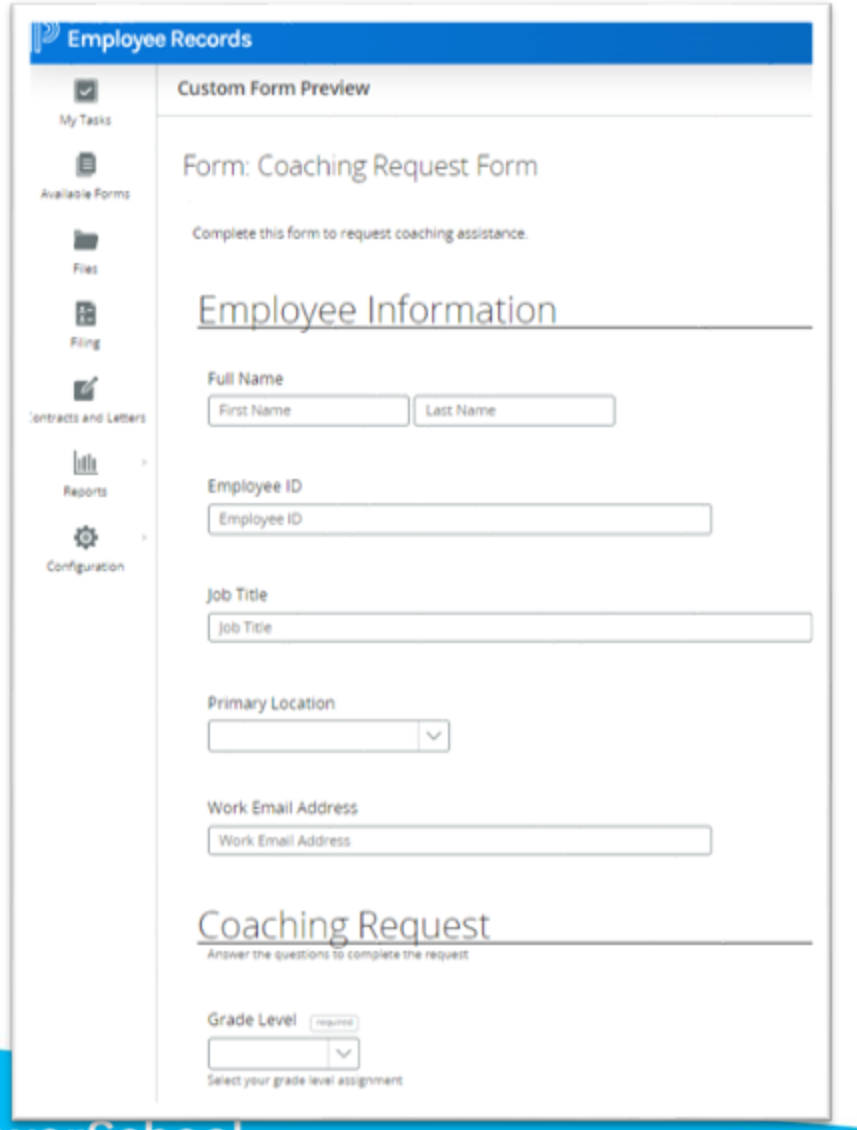
Structuring a Basic Form: Other Question Types



Workflow Considerations

- Does the answer to a question(s) determine who reviews or approves the ticket request?
  - If yes, you will need to create a conditional workflow
- Who will review or approve the request?
  - Best practice is to assign a group not a single person (even if the group is a single person)
- Custom workflows should be specific to the document it is assigned to
  - Give it the same name as the document it is created for
  - Create the workflow within the document

Let’s Take a Look



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Perform

Utilizing Peer Processes for Coaching & Mentoring

Agenda

1. What are peer processes?
2. Why would we use them?
3. How do we implement?
4. Sample process
5. Q&A

Peer Processes

- Peer processes are anything we want to utilize in the system that does not include a supervisor of official evaluator
  - Coaching
  - Mentoring
  - Peer Observation
  - Instructional Rounds

Why provide coaching and mentoring?

- State requirement
- District initiative
- Increases educator effectiveness
- Reduces turnover

Why track it in Perform?

- Employee documentation - tracking
- Effective filing
- Streamlines process
- Can be confidential from different employee groups

How Do We Implement?

Peer Tasks

- Tasks can be preset and assigned to a peer
- Collaboration can be used so that both parties can view or work in the form
- Peers can share form with direct report for comments
- Peer cannot 'sign the form' in workflow

Coaching & Mentoring Processes

- Coach or mentor can own multiple tasks and have control over the process
- Assigning as an evaluator does not give access to any other evaluation processes assigned
- Forms can go through workflow with both parties being able to sign
- Walkthroughs can be added to the process folder
- Form history can be hidden from supervisors if needed

Ad-Hoc Walkthrough Forms

- Visible or hidden from the supervisor or evaluator upon completion
- New security feature would allow peer access to previously filled out walkthroughs for reference
- Can be done at adhoc and quickly accessed
- Allows feedback forms to be completed and continually added

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Professional Learning

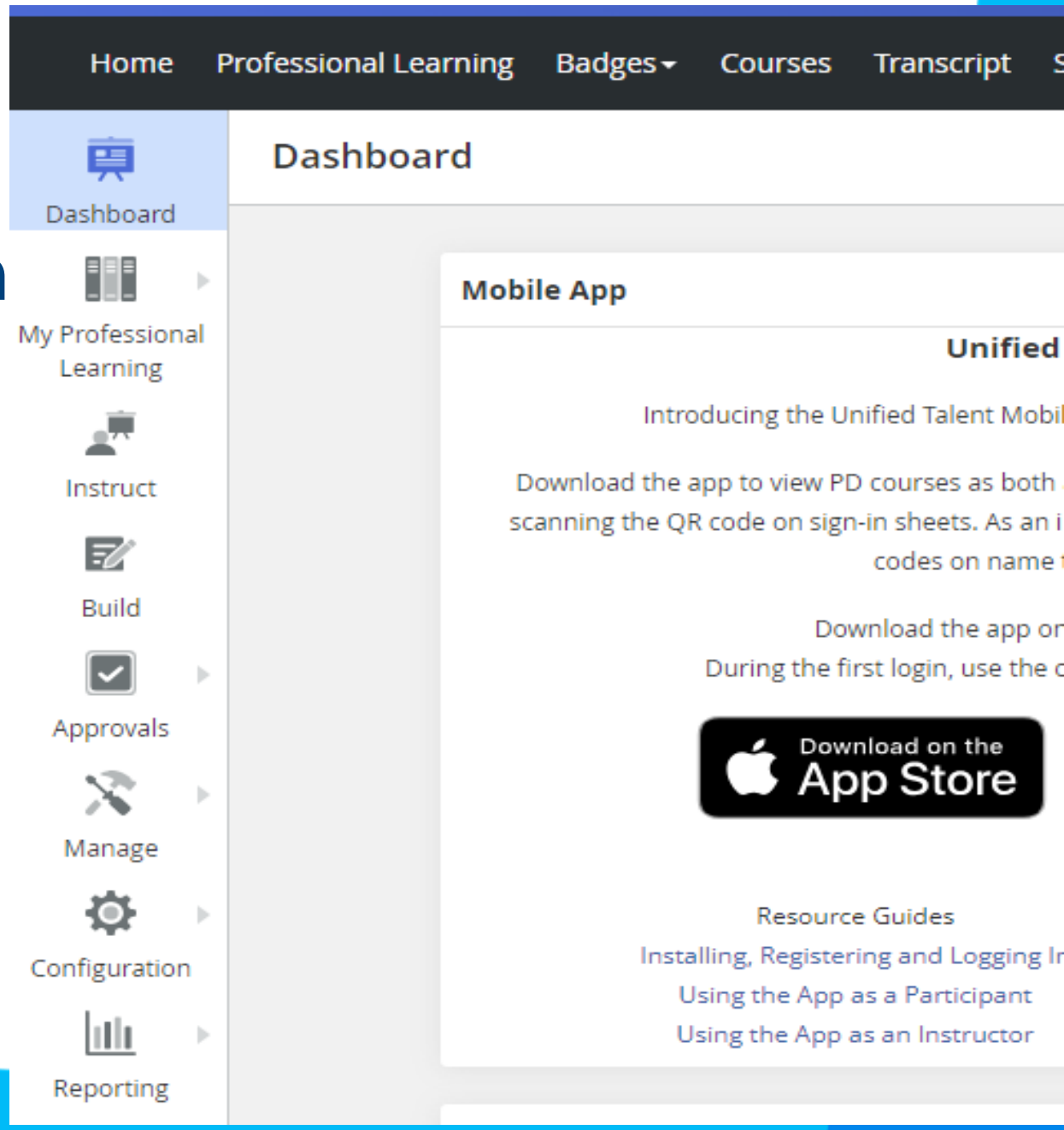
New Features in Upgraded Administration

Agenda

1. **“What?!?!?**
   I didn’t know the upgraded administration could…”
2. **Migration Settings**
3. **New Updates in Upgraded Administration**
4. **Next Steps**

“What?!?!? I didn’t know the upgraded administration could…”

- What is the upgraded administration in Professional Learning?
  - Link for More Information
- Districts who upgraded from the legacy administration to the upgraded administration
- Districts who implemented in the upgraded administration

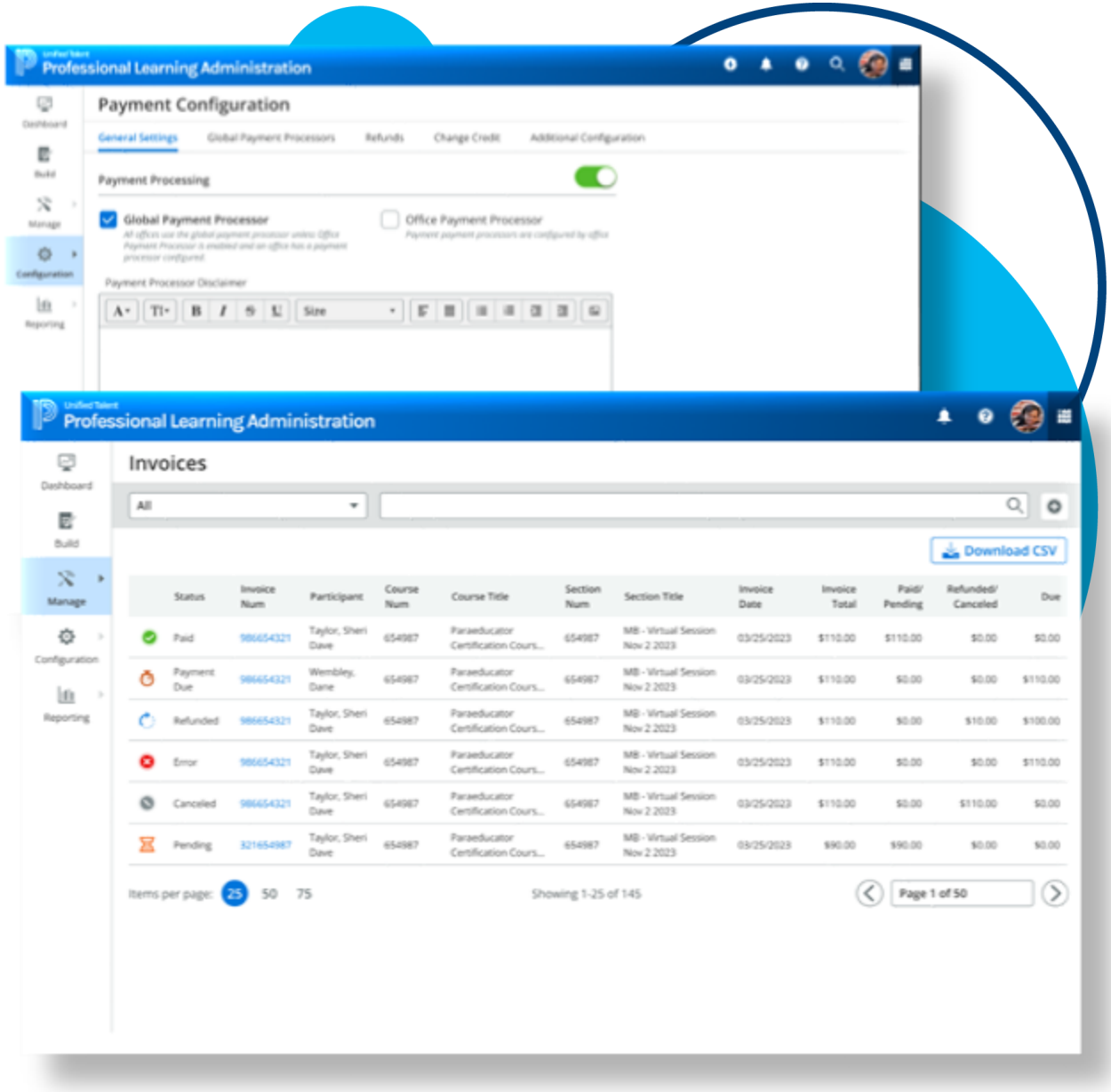


Migration Settings

- Professional Learning platform elements able to ‘fold’ into ‘Professional Learning’
    - PD Playlist
    - Transfer Credit Manager
    - Transcript
    - New Catalog
    - Rubrics Alignment
    - Surveys
    - Payment*
    - Schoology Template Creation*

- District decides which elements to migrate during upgrade. Services can activate additional elements later if district decides to turn on after upgrade. * Indicates services involvement and additional charge to activate.

Professional Learning
Payment Management



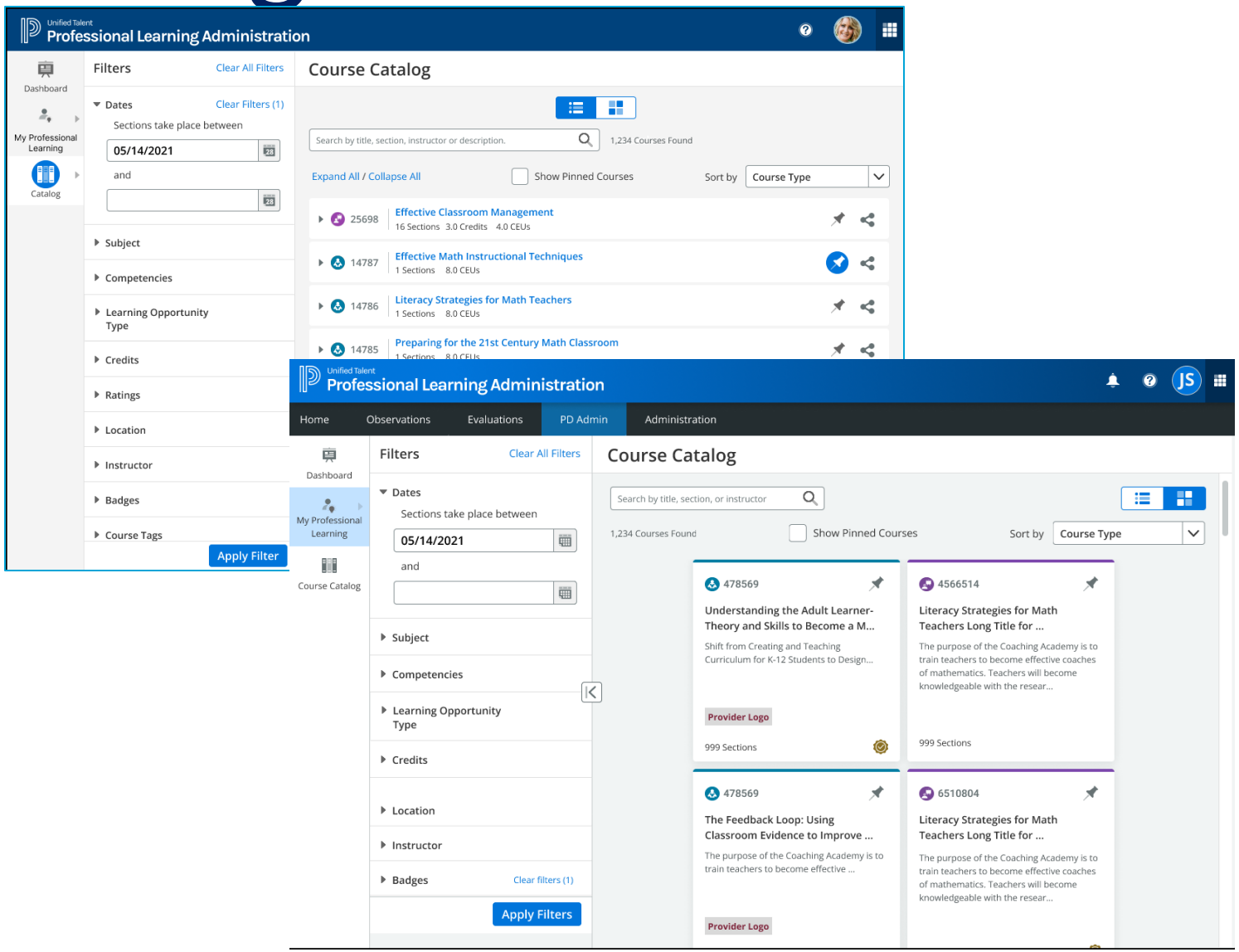
Highlights:

- Self-serviceable:
  - Configuration
  - Global or office payment processors
  - Payment refunds
- Payment status reporting

Professional Learning

Catalog View

- Learners have greater flexibility when looking for courses



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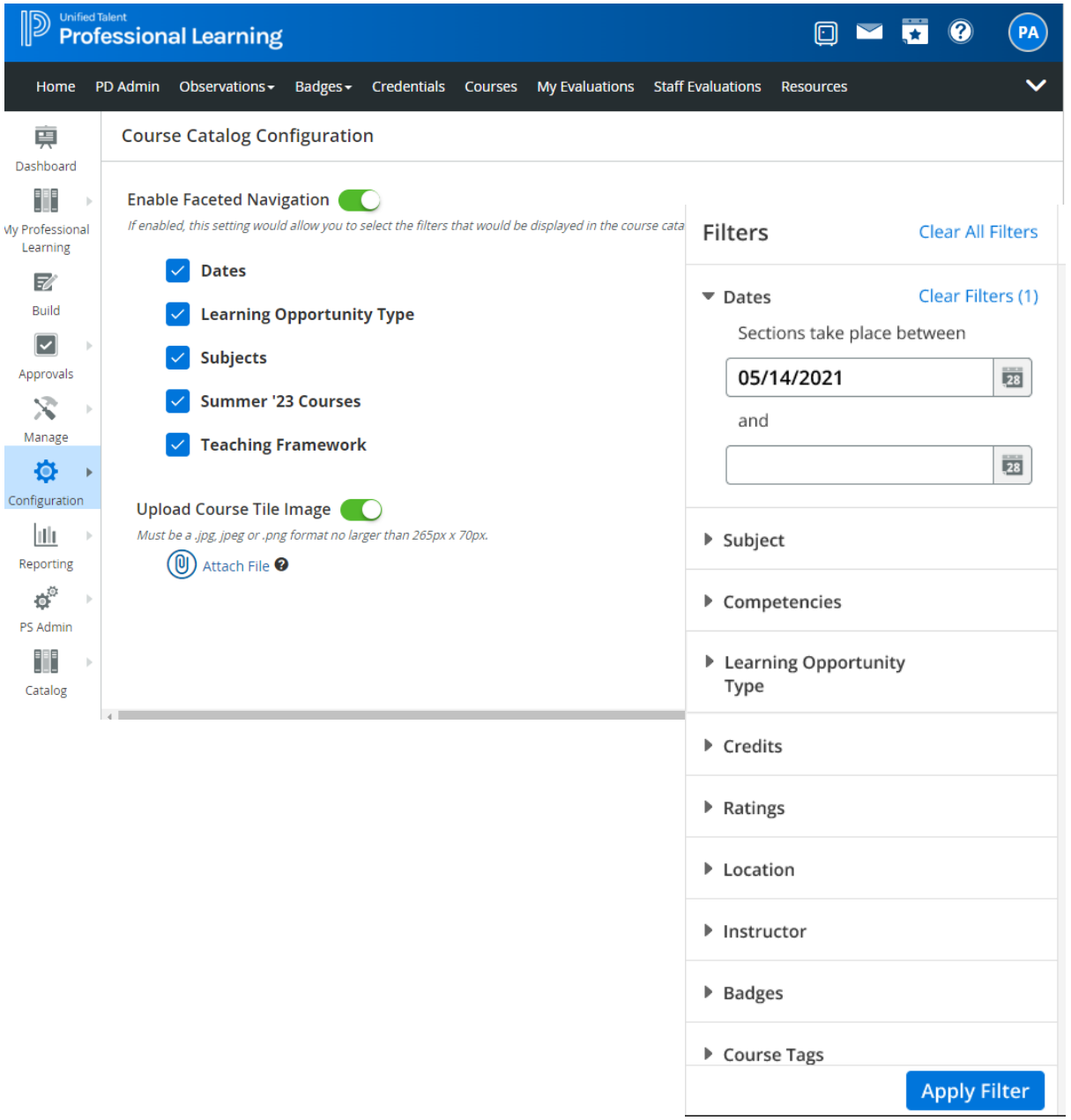
Professional Learning
Improve Catalog Filtering

- Self-serviceable configuration:
  - Enable/disable advanced filters
  - Configure whether custom course tags required/not required during course creation
- Easier for learners to find the courses they need



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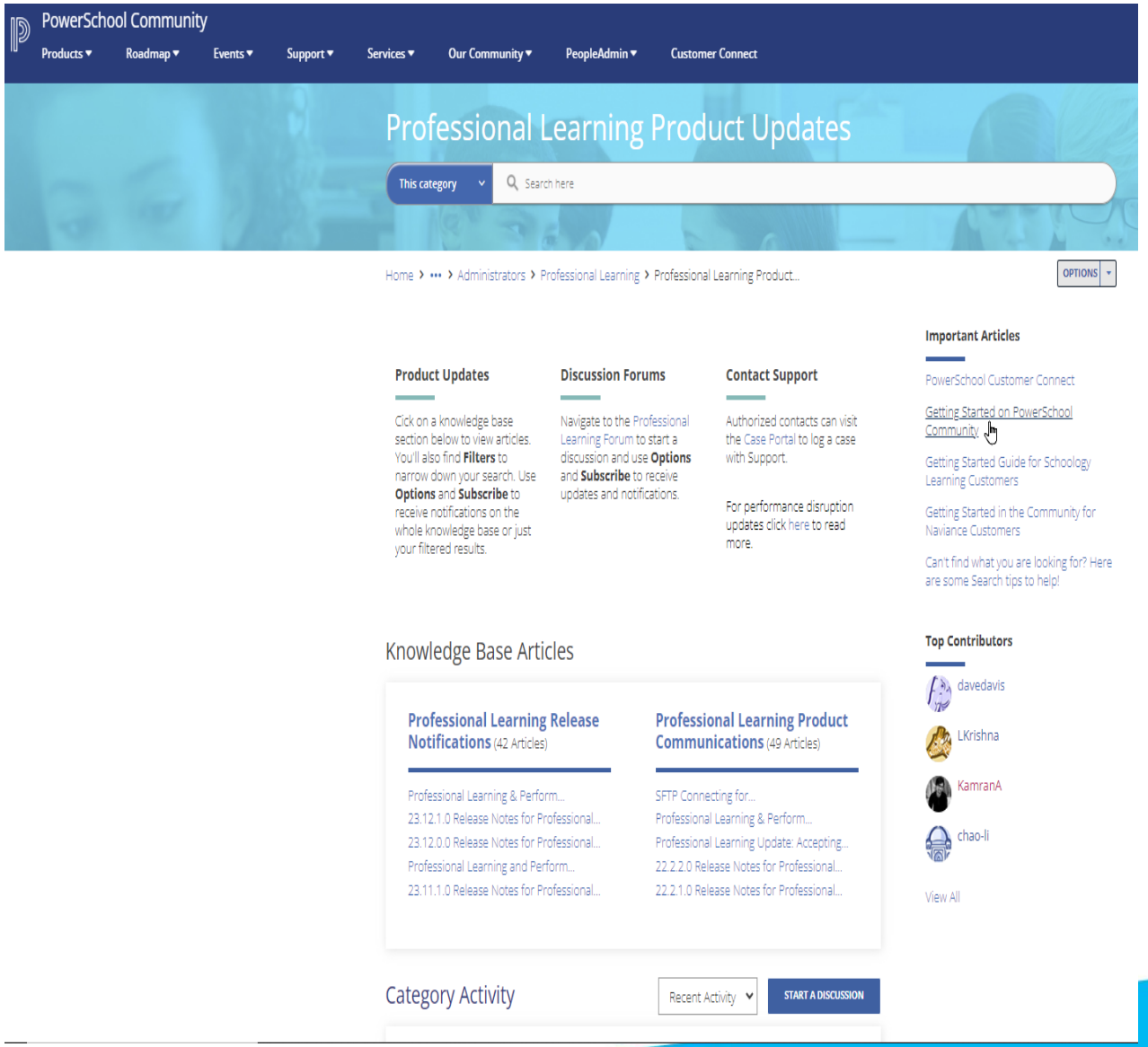
New Updates in Upgraded Administration

- Professional Learning product enhancements, updates and bug fixes
  - Stay informed and subscribe in the PowerSchool Community
  - These updates are applied to your platform by PowerSchool
  - Product Enhancement
  - Updates
  - Bug Fixes



Examples of Recent Updates in Upgraded Administration

- Bulk Course Management
- End Registration Date Update
- Section Grade Column Added
- Roster File Attachment
- Lock/Unlock info in Ad-Hoc
- Components
- Office Credit Types
- Due Date Reminder in PD Playlist
- Updated Adding Participants to PD Playlist
- Can Hide Section Grade Column on Roster
- Credit Areas Configuration Page
- Waitlist History
- Added Course Completion Notification
- Location Smart Search
- Override Maximum Participants Rule
- Google Classroom Integration
- Transcript Summary

Next Steps

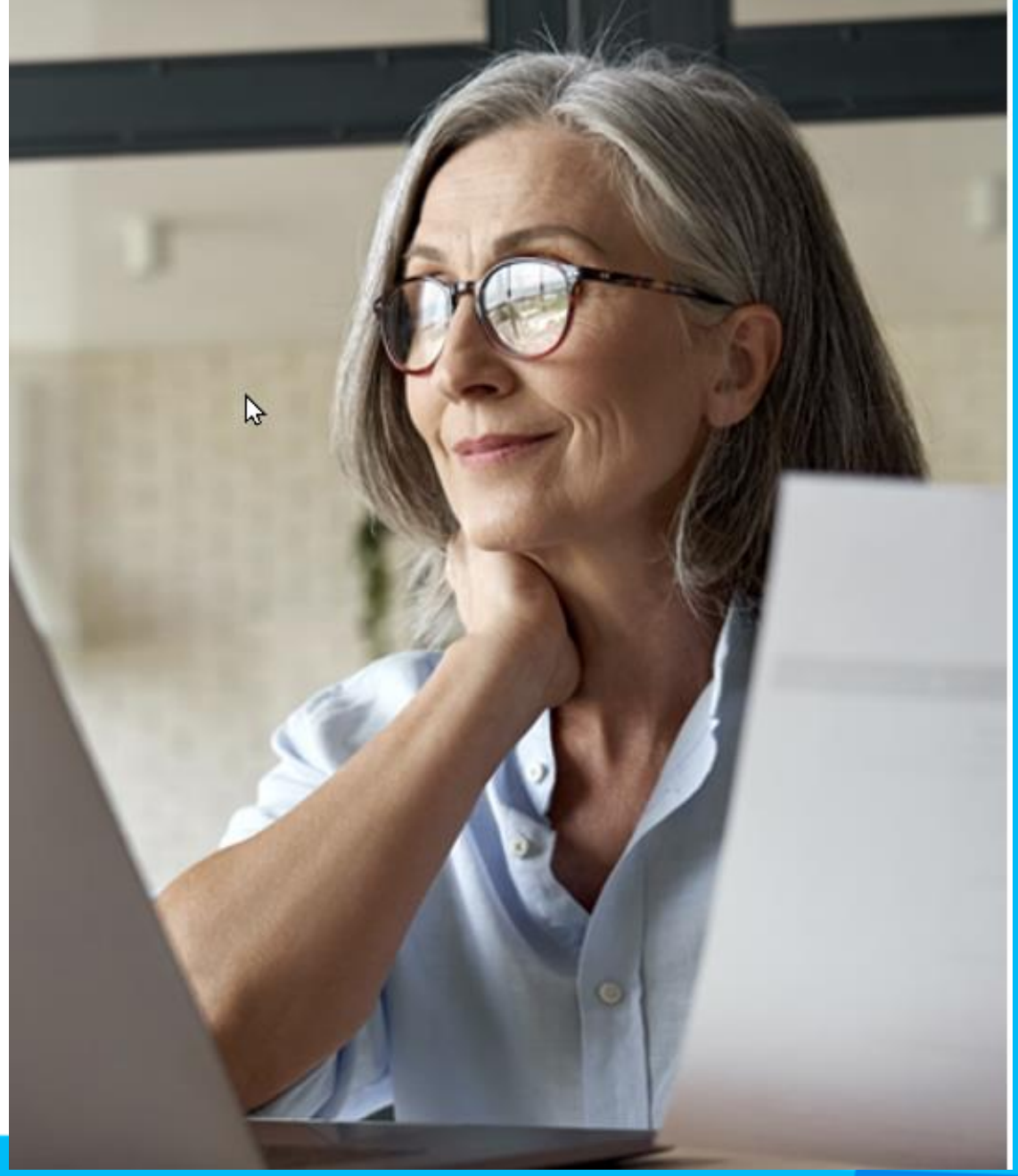
Connect with colleagues in PowerSchool Community Page

Updates will be shared by EICs via in the PowerSchool Community Page

Monthly email reminder to join our next PowerUp Meeting

Register for Upcoming Talent PowerUps Today!

- Feb 13, 2024 09:00 AM PDT
- Feb 14, 2024 07:00 AM PDT
- Feb 15, 2024 12:00 PM PDT



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