

# Welcome to the Special Programs PowerSchool PowerUp!



# PowerUPs

November 8, 2022

# Today's Agenda

- **Welcome and Overview**
- **Platform Release**
- **Utilities**
  - Students
    - Mass Updating Student Fields (Replace Fields)
    - Deactivating and Reactivating Student Profiles
    - Merging and Deleting Student Profiles
  - Student Transfer Utilities
    - Sending and Receiving Transfer Envelopes
- **Next Steps and Additional Resources**



# Meet the Team

## Robyn Skidmore

*Education Impact Consultant II*

- Retired educator - 26 years
  - Special Educator
  - Reading Specialist
- PowerSchool - 3 years
- Special Programs - 2 years



## Special Programs Support



- Our Support Team is on the call to assist with technical questions.
- Please submit your questions into the Q&A during presentation.
- There will be time for additional Q&A at end of the meeting.

# PowerUps in PowerSchool Community

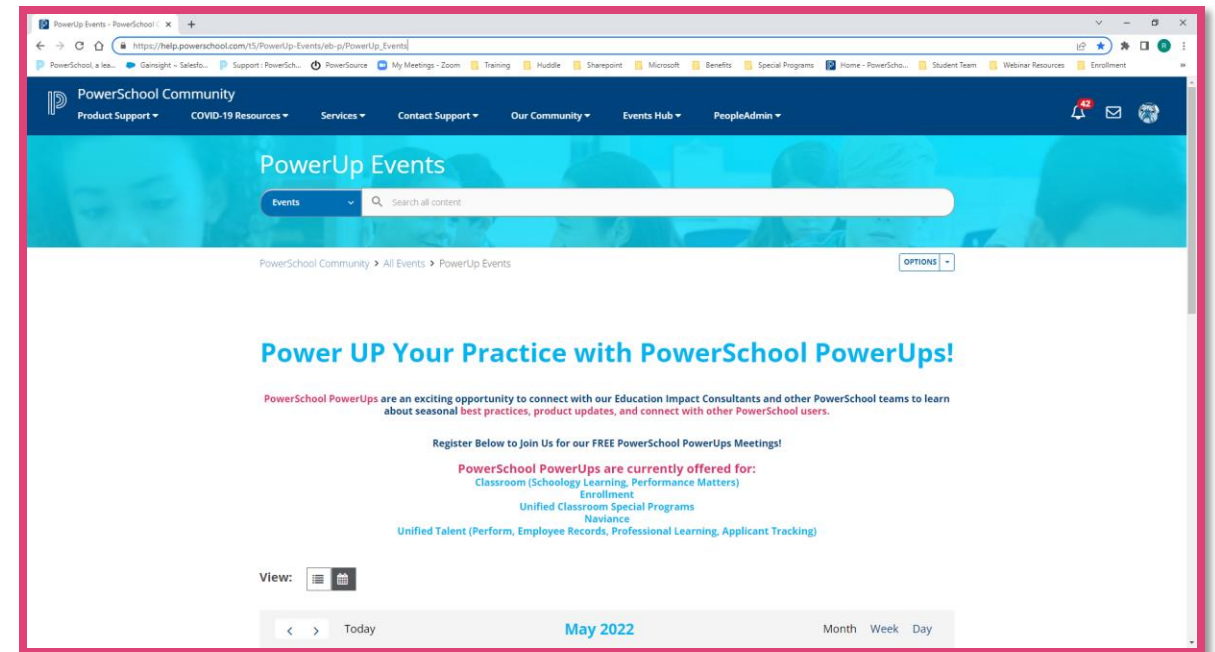
## PowerSchool Special Programs Community Page

- Find resources shared by EICs
- View updates
- Access Recordings
- Register for other PowerSchool PowerUp events



# PowerSchool PowerUp Events Page

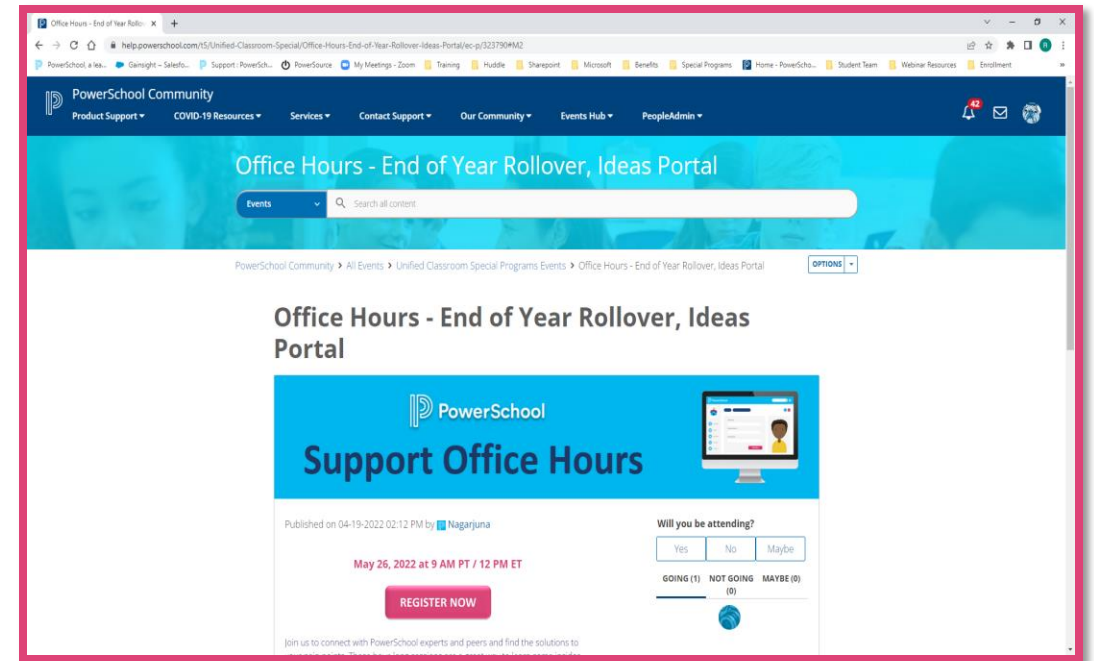
- Register for any upcoming PowerSchool PowerUp Events!
  - *Events Hub > All Events > PowerUp Events*
- PowerUps are currently offered for:
  - Classroom (Schoology & Performance Matters)
  - Unified Classroom Special Programs
  - Naviance
  - Enrollment
  - Talent (Professional Learning, Applicant Tracking, Records and Onboarding, Perform)
  - Unified Insights



# Unified Classroom Special Programs Office Hours

## Register for upcoming Office Hours Events!

- *Events Hub > All Events > Unified Classroom Special Programs Events*
- The last Office Hours session for 2022 is scheduled for **December 1<sup>st</sup>**!
- Join us to:
  - Connect with PowerSchool experts and peers
  - Find the solutions to your pain points
  - Learn some insider tips for using Special Programs
  - Receive answers to your questions in real-time through our live Q&A forum



# Your Feedback is Important!

I appreciated the handout for suggested System Administration Related Security Groups!

It would be helpful if there was a more detailed explanation of user properties and privileges.

I would like to see another call like this one. Very informative!

How can I access the In-Platform Help and Community Resources slides you share during PowerUps at a later time?

# Platform Release Highlights

Version SPPL 22.6.4.0

Release Date: November 3-4, 2022



## Special Programs 22.6.3.1 Hotfix

### Digital Signature

- Available as of October 14, 2022
- Resolved an issue affecting some customers where the completed and signed PDF file did not display the completed consent option or the parent's signature
- Previously signed PDF files affected by this issue updated to display signatures within three business days of this hotfix

## Special Programs 22.6.3.2 Hotfix

### Digital Signature

- Available as of October 20, 2022
- Resolved an issue where some staff members would receive an error message stating that they did not have enough privileges to sign documents using the “Sign Now” or “Sign Document” options after signing into Special Programs; documents could be successfully signed via email by staff members

# Resolved Issues

## Digital Signature

- Resolved an issue where after voiding a Digital Signature request, the Signature Request Options and Delete Digital Signature requests were not available
- Resolved an issue where Digital Signature Details displayed an error status for signed documents

## Digital Signature - Enable Error

- Resolved an issue that occasionally prevented customers from saving changes after trying to enable Digital Signature in Special Programs and resulted in an error report

## Digital Signature - Sign Now

- Resolved an issue where staff signers could not access the Sign Document button in Sign Now mode

## Documents

- Resolved an issue where document watermarks were not displayed correctly in print or download to PDF modes

## System Admin

- Resolved an issue where the ADMIN user received an error when attempting to add or edit keywords; this issue was present only in Special Programs 22.6.3.0

# New Features and Enhancements

## Digital Signature

- District administrators can choose multiple PDFs or a single PDF with merged response; access the PDF creation options from the Digital Signature settings
- PDF Creation Options field added to Digital Signature Settings under Configuration
- Ability select to different PDFs for different signers

## Digital Signature Configuration: Ready Document Template List

- The document templates list on the Digital Signature Settings page displays only active documents in alphabetical order

## Digital Signature: Select Primary Signer

- The Digital Signature Details dialog has a new feature that allows the staff member to choose which signer's response to use as the document's official data

# New Features and Enhancements

## Parent Portal

- The student's name appears on the home page when a parent or guardian signs into Parent Portal

## Standard Reports

- Administrators have an option for Immediate Sync Report under Configuration Management to sync security settings for reports
- When setting up report parameters for a standard report, it is now possible to specify default values for non-optional report parameters. The default values are specified in the form of a Globals profile expression. This is useful when you need to set default values for date parameters based on key dates stored in the Globals profile or the current date

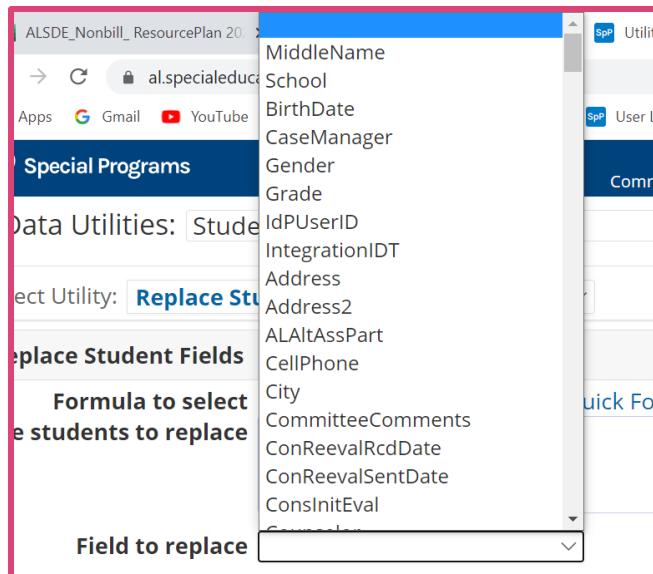
## Student Documents

- Added the ability for ADMINS to edit a final document's Comment/Label without having to unfinalize the document

# Data Utilities in Special Programs

# Student Utilities > Replace Student Fields

- Select **Administration > Utilities**
- Select **Data Utilities > Students**
- Select **Utility > Replace Student Fields**



A screenshot of the 'Replace Student Fields' utility interface. The 'Data Utilities' dropdown is set to 'Students' and the 'Select Utility' dropdown is set to 'Replace Student Fields'. The main section is titled 'Replace Student Fields' and contains a 'Formula to select the students to replace' field with a 'Quick Formula' button. Below this is a 'Field to replace' dropdown menu. The 'Replace With' section has two radio buttons: 'Specific Value' (selected) and 'Calculated Values'. A note at the bottom right says 'Note: You will next have a chance to see the students and confirm...' and a 'Continue' button is visible.



**Knowledge is Power!**

**Use with caution! This cannot be undone.**

# Example: Mass Assign Case Manager



**Knowledge is Power!**  
You can use Replace Student Fields to assign or replace Case Managers.

Data Utilities:  1

Select Utility:  2

**Replace Student Fields**

Formula to select the students to replace:  3

Field to replace:  4

Replace With:  Specific Value  Calculated Values

*Note: You will next have a chance to see the students and confirm...*

5

**Replace Field in Student Profiles**

Enter the replacement value below:

Case Manager  6 (ID) lookup

Mark the student profiles that you want to replace field in below...

<input checked="" type="checkbox"/>	ID	Last Name	First Name	Case Manager	Birth Date	Grade	Gender	School	City
<input checked="" type="checkbox"/> 7		Bennett	Heidi		07/08/2010	First grade	Female	New School	Apple Grove
<input checked="" type="checkbox"/>	112233	Ramakrishna	Sandhya		07/20/1992	First grade	Female		

8

# Deactivate Students

Data Utilities:  1

Select Utility:  2

**Deactivate Student Profiles**

Formula to select the students to deactivate  Student Selection Formula Quick Formula 3

*Note: You will next have a chance to see the students and confirm...*

4



**Knowledge is Power!**

Students can be deactivated and reactivated individually on the Student Demographics Profile page



# Merge Student Profiles

- Sometimes school districts may find that there are two student profiles for the same student
- During the merge, only one profile, referred to as **the "target" profile**, will be retained

Data Utilities:  1

Select Utility:  2

**Merge Student Profiles**

ID of Target Student To Merge Into  lookup 3

*Note: This should be the profile with the most current data*

4



**Knowledge is Power!**

**First Name and Last Name must match on the Target and Source Profile!**

**Merge Student Profiles**

**Target Profile:**

ID	Last Name	First Name	Birth Date	Grade	Gender	Case Manager	School	City
1415	Ackerman	Bob	07/08/2000	Third grade	Male	ss,ss		Apple Grove

**Select source profile to merge into the target:**

	ID	Last Name	First Name	Birth Date	Grade	Gender	Case Manager	School	City
<input type="radio"/>	6014	Ackerman	Bob	07/08/2003	79	1	1937	2	testCity

# Merge Student Profiles

- The documents and events from the other "source" profile will be moved to the target
- The source profile will be deleted

**Merge Student Profiles** Standard Reports  
Advanced Reports

**Target Profile:**

ID	Last Name	First Name	Birth Date	Grade	Gender	Case Manager	School	City
1415	Ackerman	Bob	07/08/2000	Third grade	Male	ss,ss		Apple Grove

**The following changes will be made upon completion of this operation:**

From Source Student **Bob Ackerman (6014)**

- 2 Behavioral Intervention Plan document(s) will be merged
- 1 Early Intervention to Preschool Transition Plan document(s) will be merged
- 1 EL Home Language Survey document(s) will be merged
- 2 EL Title III Waiver document(s) will be merged
- 1 Gifted Education Plan document(s) will be merged
- 1 Gifted Eligibility/Screening Determination Form document(s) will be merged
- 1 Hearing Screening Form document(s) will be merged
- 1 Individualized Education Program document(s) will be merged
- 1 Vision Screening Form document(s) will be merged
- 1 Written Agreement to Amend IEP document(s) will be merged
- 30 event(s) will be merged

**The source profile will be deleted**

24 field difference(s) found. [Click here to merge differences.](#)

**Merge Profile(s)** < Back Cancel

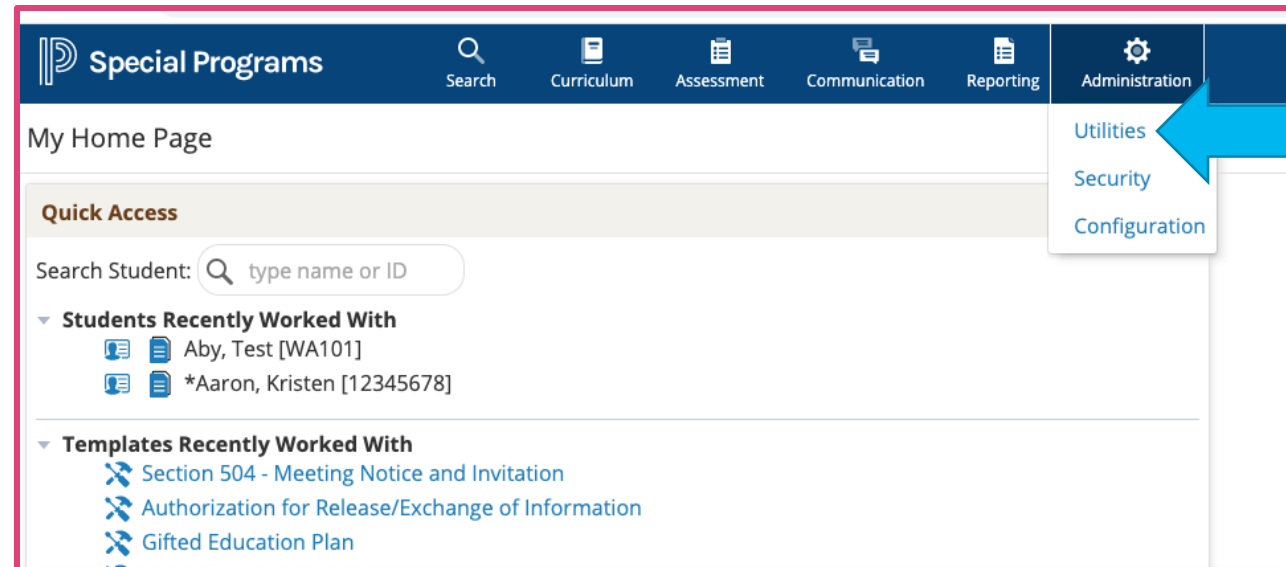
# Configure Transfer Notifications

- The **Transfer Notification Security Group** is used to identify users who will can request and receive transfer envelopes from other districts within your state

Transfer Notification (Security Group Default) >	
Privilege Set	(+) Granted (-) Denied
<b>System Administration</b>	(+) Send Announcements (System-Wide) (+) Send Red Alert Announcements
<b>Students Profiles &amp; Documents</b>	(+) View Students (System-Wide) (+) Access Documents (System-Wide) (+) Maintain Own File Based Documents (System-Wide) (+) Send Transfer Envelopes Students (+) Receive Transfer Envelopes Students
<b>GeneralEdStudents Profiles</b>	(+) View General Ed Students (System-Wide)

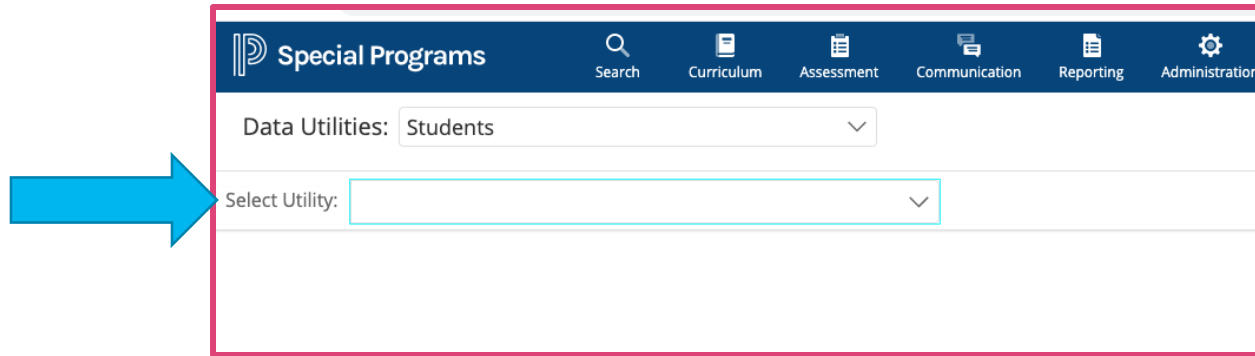
# Send a Student Envelope

- Log in and select **Administration > Utilities**

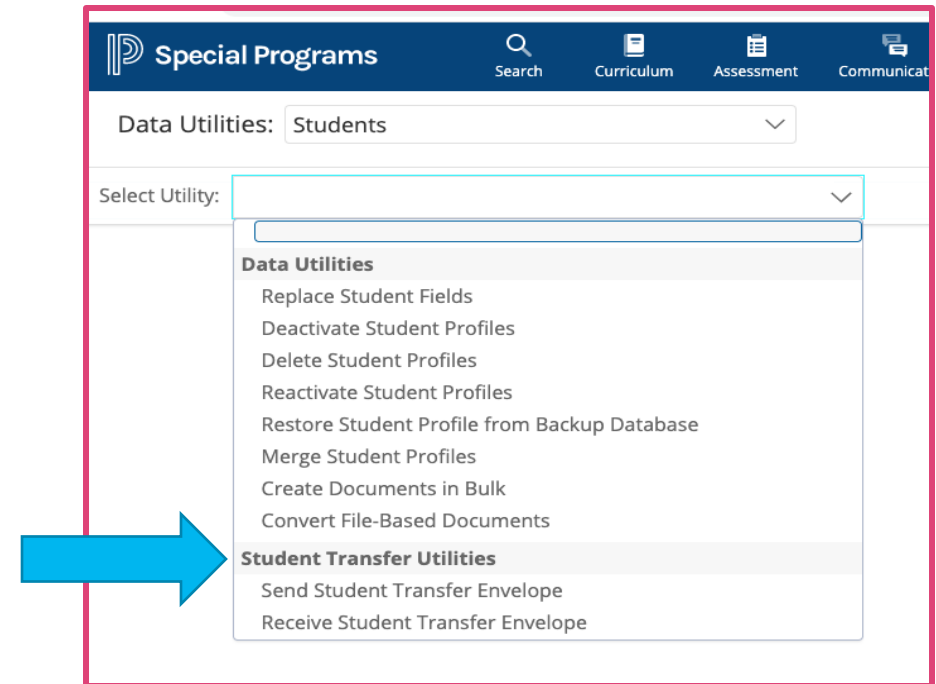


# Send a Student Envelope

- **Select Utility** field drop-down menu



- **Select Send Student Transfer Envelope**



# Send a Student Envelope

- Select the student(s) to be included in the envelope; search can be done via **lookup**

Special Programs

Data Utilities: Students

Select Utility: Send Student Transfer Envelope

Send Student Transfer Envelope

Include Student IDs  lookup

Create Student Transfer Envelope Use Formula To Select Students

Existing Outbound Student Transfer Envelopes

Creation Date	Created By	Students	Envelope Status
03/19/2021 Fri, 11:15 AM	CONSULTANT (PowerSchool - Kim Kaltenbrun)	Dahl,Adam S	Not Sent Yet
03/19/2021 Fri, 11:12 AM	CONSULTANT (PowerSchool - Kim Kaltenbrun)	Aby,Ann	Sent on 3/19/2021 to 'ALSDETrainingSite', Exp

Data Utilities: Students

Select Utility: Send Student Transfer Envelope

Send Student Transfer Envelope

Include Student IDs 

Create Student Transfer Envelope Use Formula To Select Students

Existing Outbound Student Transfer Envelopes

Creation Date	Created By	Students	Envelope Status
03/19/2021 Fri, 02:02 PM	ADMIN (Security Administrator)	*Aikinson,Andy	Not Sent Yet
03/19/2021 Fri, 11:15 AM	CONSULTANT (PowerSchool - Kim Kaltenbrun)	Dahl,Adam S	Not Sent Yet
03/19/2021 Fri, 11:12 AM	CONSULTANT (PowerSchool - Kim Kaltenbrun)	Aby,Ann	Sent on 3/19/2021 to 'ALS

# Send a Student Envelope

**Send Student Transfer Envelope**

Mark the student profiles that you want to transfer below...

Page size: 10
 10 Students in 1 Pages

<input type="checkbox"/>	ID	Last Name	First Name	Birth Date	Grade	Primary Disability	Sex	Case Manager	Location	Student ID	Gender	Id PUser ID
<input type="checkbox"/>	201800381	Adams	Frank	11/01/2003	Eleventh grade	Specific Learning Disability	Male		Apple Grove High School 3			
<input type="checkbox"/>	201800382	Adams	Jenna	06/24/2011	Fourth grade	Speech or Language Impairment	Female		Washington Elementary School	8675309		
<input type="checkbox"/>	77051	Adams	Kenyon	01/28/2015	Kindergarten Full Day (K5F)	Specific Learning Disability	Male		Washington Elementary School			
<input type="checkbox"/>	817370	Adams	Molly	02/19/1992	Ninth grade		Female		Apple Grove High School 3			
<input type="checkbox"/>	77076	Anderson	Lucas	05/05/2006	Tenth grade	Specific Learning Disability	Male		Apple Grove High School 3			
<input type="checkbox"/>	201210190	Baker	Lamont	04/13/2010	Fifth grade	Hearing Impairment including Deafness	Male		Washington Elementary School			
<input type="checkbox"/>	201200163	Danger	Eric	04/03/2011	Fourth grade	Autistic/Autism	Male		Washington Elementary School	123		
<input type="checkbox"/>	591025	Danger	Gary	12/12/2012	Third grade	Emotional Disturbance	Male		Washington Elementary School			
<input type="checkbox"/>	1121	Larson	Benjamin	07/09/2013	Second grade	Autistic/Autism	Male		Washington Elementary School			
<input type="checkbox"/>	86482	Simpson	Brian	12/26/2009	Fifth grade		Male		Washington Elementary School			

Page size: 10
 10 Students in 1 Pages

# Send a Student Envelope

- Click **Create Student Transfer Envelope**

Special Programs

Data Utilities: Students

Select Utility: Send Student Transfer Envelope

Send Student Transfer Envelope

Include Student IDs: 12345678 (Kristen \*Aaron); 6 (Andy \*Aikinson) lookup

Create Student Transfer Envelope Use Formula To Select Students

Existing Outbound Student Transfer Envelopes

Creation Date	Created By	Students	Envelope Status
03/19/2021 Fri, 03:07 PM	ADMIN (Security Administrator)	2x (*Aaron,Kristen + 1)	Not Sent Yet

Special Programs

Utilities > Send Student Transfer Envelope

Generate Student Packages Setup...

Student Packages (Envelope Not Sent Yet)

ID	Student Name	Package Status	
12345678	*Aaron,Kristen	Package Not Generated	✗
6	*Aikinson,Andy	Package Not Generated	✗

- Click **Generate Student Packages**



# Send a Student Envelope

- Select the **Profile Sections** and **Document Types** that you want to send to the receiver

**Special Programs** Search Curriculum Assessment Communication Reporting Administration

Utilities > Send Student Transfer Envelope

**Generate Student Packages**

**Select Profile Sections**

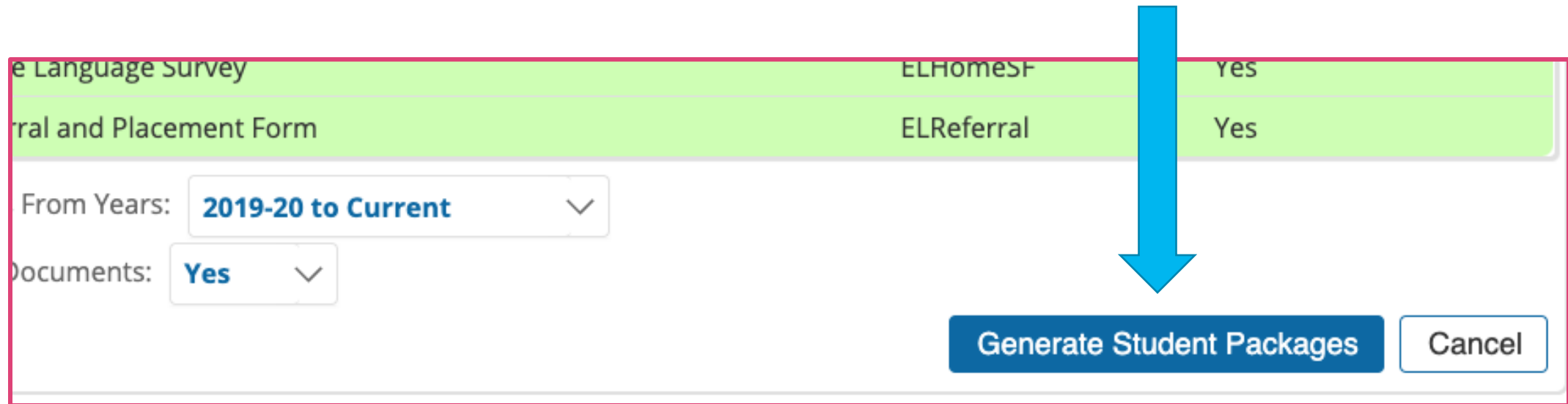
	Section Name
<input checked="" type="checkbox"/>	Student Demographics
<input checked="" type="checkbox"/>	Special Education

**Select Document Templates**

	Name	Template Code	Live Documents?
▼ Referral Process			
<input checked="" type="checkbox"/>	Early Intervention to Preschool Transition Plan	EI_PS_TRAN	Yes
<input checked="" type="checkbox"/>	Referral for Evaluation	Referral	Yes
<input checked="" type="checkbox"/>	Notice and Consent for Initial Evaluation	InitEvCons	Yes
▼ IEP Process			
<input checked="" type="checkbox"/>	Individualized Education Program	IEP	Yes
<input checked="" type="checkbox"/>	Persons Responsible for IEP Implementation	PersResp	Yes
<input checked="" type="checkbox"/>	Behavioral Intervention Plan	FBABIP	Yes
<input checked="" type="checkbox"/>	Manifestation Determination Review	MDR	Yes

# Send a Student Envelope

- When you are finished selecting the options to send to the receiver, click **Generate Student Packages** (scroll to bottom of page)



The screenshot shows a web form with a table of data and several input fields. A large blue arrow points from the table down to the 'Generate Student Packages' button.

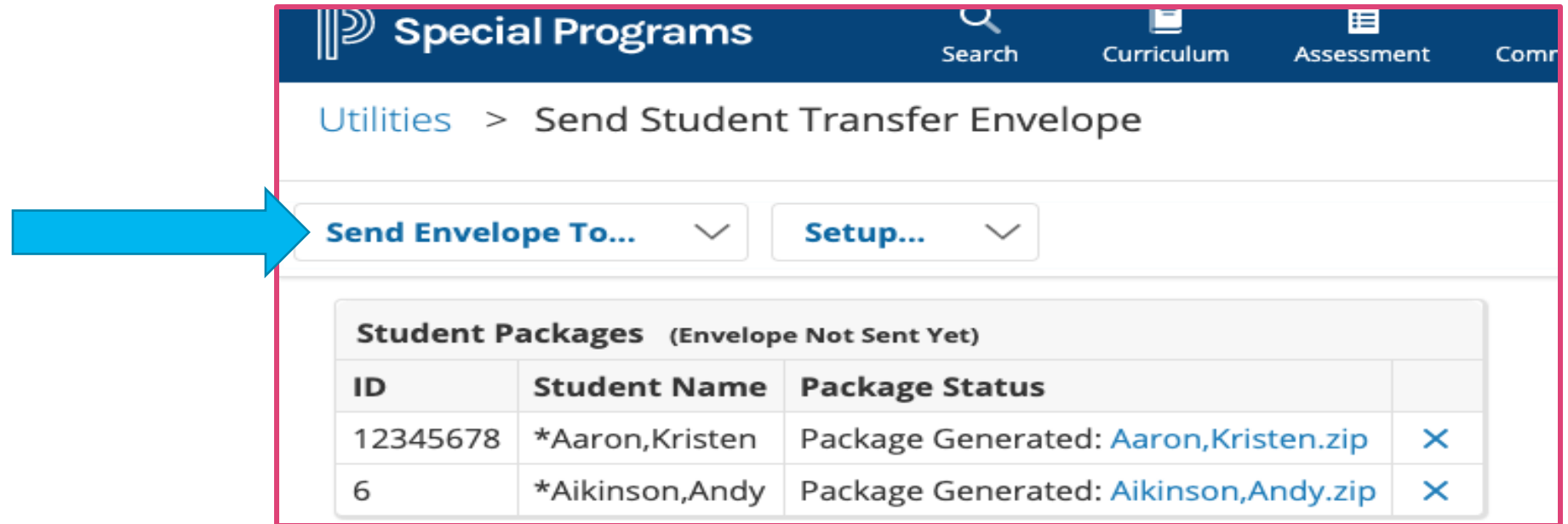
Language Survey	ELHomeSF	Yes
Initial and Placement Form	ELReferral	Yes

From Years:

Documents:

# Send a Student Envelope

- Click **Send Envelope To...** to decide how you'll send the envelope



The screenshot shows the 'Special Programs' interface. The breadcrumb trail is 'Utilities > Send Student Transfer Envelope'. Below the breadcrumb, there are two dropdown menus: 'Send Envelope To...' and 'Setup...'. A blue arrow points to the 'Send Envelope To...' dropdown. Below the dropdowns is a table titled 'Student Packages (Envelope Not Sent Yet)'. The table has four columns: ID, Student Name, Package Status, and an action column with an 'X' icon.

ID	Student Name	Package Status	
12345678	*Aaron,Kristen	Package Generated: Aaron,Kristen.zip	X
6	*Aikinson,Andy	Package Generated: Aikinson,Andy.zip	X

# Send a Student Envelope

- If you choose **email**:

The screenshot shows the 'Special Programs' interface with the 'Send Student Transfer Envelope' utility selected. The 'Send Envelope To Email Address' section has an empty 'Email Address' input field. Below it, the 'Email Preview' shows the following details: 'To: Administrator at Above Email Address', 'Subject: Student Transfer Envelope Received From 'Alabama Model'', and 'Body: 'Alabama Model' has sent you a student transfer envelope containing 1 student. Click here to access it. For security purposes, you will need to obtain a separate security code directly from the sender before you can successfully access the envelope's contents. Your access to the envelope will expire after 3/26/2021.' At the bottom right, there are 'Send Envelope' and 'Cancel' buttons.

- If you choose **school district**:

The screenshot shows the 'Special Programs' interface with the 'Send Student Transfer Envelope' utility selected. The 'Send Transfer Envelope To School/District Hosted at "specialeducation.powerschool.com"' section has a 'State/Area' dropdown set to 'AL' and an empty 'School/District:\*' dropdown. A note below states: '\* If a school/district is not listed, it may not be hosted on "specialeducation.powerschool.com". As an alternative, you can click here to send the transfer envelope to an email address.' The 'Message Preview' shows: 'To: Receiving School/District Administrator', 'Subject: Student Transfer Envelope Received From 'Alabama Model'', and 'Body: 'Alabama Model' has sent you a student transfer envelope containing 1 student. To access it, go to Administration > Utilities > Receive Student Transfer Envelope. Your access to the envelope will expire after 3/26/2021.' At the bottom right, there are 'Send Envelope' and 'Cancel' buttons.

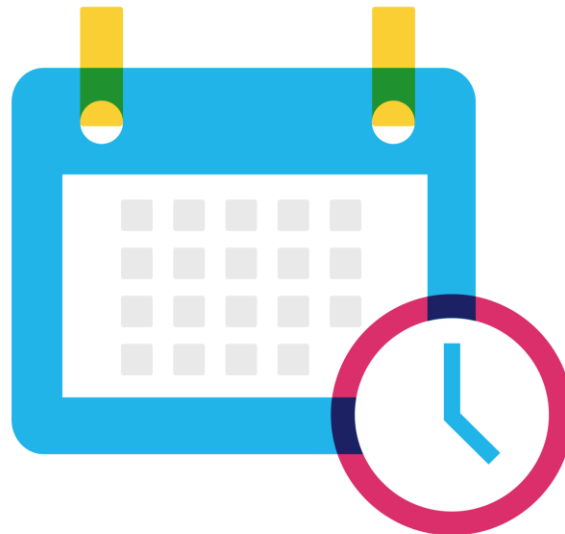
- When finished, click **Send Envelope**

# Next Steps and Additional Resources

# Special Programs PowerUp Events and Office Hours

**December 1:** Office Hours – **Topic:** *Utilities/Transfer Envelopes*

**NEW for 2023:** Special Programs PowerUp Webinars – **Offered MONTHLY!**



# Please Share Your Feedback!

- You will be asked to take a **short survey** when leaving the Zoom Meeting
- Help us help you – We value **your feedback** and use it to create future sessions





# In-Platform Help

## In-App Help for Unified Classroom Special Programs:

- **End of Year Rollover**
  - Configure Calendar
  - Configure Marking Periods
- **Translations**
- **Security**
  - Security Groups
  - Configure Document Template Security
- **Digital Signature**
  - Configure Digital Signature
  - Send Signed PDF



# In-Platform Help

## In-App Help for Unified Classroom Special Programs:

- **Digital Signature**
  - [Configure Digital Signature](#)
  - [Add and Send Signature Requests with Digital Signature](#)
  - [Sign a Document Using Digital Signature](#)
  - [Send Signed PDF](#)
- Manage Signature Requests
  - [Digital Signature Details](#)
  - [Digital Signature Documents Utility](#)

# In-Platform Help

## In-App Help for Unified Classroom Special Programs:

- **Data Utilities (Student)**
  - [Replace Data in Multiple Fields](#)
  - [Deactivate or Reactivate a Student Profile](#)
  - [Merge Duplicate Profiles](#)
  - [Delete Multiple Profiles](#)
  - [Transfer Students](#)
  - [Transfer or Receive Students from a Sending School or District](#)

# Community Resources

## PowerSchool Community Links for Unified Classroom Special Programs:

- [Special Programs Product Updates](#)
- [PowerSchool Ideas Portal](#)
- [PowerUp Events](#)
  - Registration and information for all PowerUps
- [Special Programs PowerUps](#)
  - Access to previous webinar recordings and slide decks
- [Special Programs Office Hours](#)
  - Access 2022 and 2021 Special Programs Office Hours
- [Unified Classroom Special Programs](#)
  - Link to Special Programs homepage in Community

# Need more training? Get involved with Customer Education!



**PowerSchool University** | [www.powerschooluniversity.com](http://www.powerschooluniversity.com)

Attend onsite and online training events for hands-on professional development covering multiple PowerSchool solutions led by certified PowerSchool Trainers



**Exclusive Training Events** | [training@powerschool.com](mailto:training@powerschool.com)

Exclusive events can be scheduled at your location and offered only to staff in your District



**Professional Development Plus** | [pdplus@powerschool.com](mailto:pdplus@powerschool.com)

On-demand training library featuring engaging formats, personalized learning, and progress monitoring



**Certifications** | [training@powerschool.com](mailto:training@powerschool.com)

We offer a variety of train-the-trainer, end user, and role-based certifications so you can become a certified PowerSchool expert



**Proven Practices** | [provenpractices@powerschool.com](mailto:provenpractices@powerschool.com)

PowerSchool experts guide your staff development to prepare your teachers and administrators to achieve success and drive improvement



# Become a PowerSchool Champion!

PowerSchool Champions connect, share and learn with others in solution-specific communities. We share our expertise as teachers, administrators, technology directors, or talent leaders. We engage in interesting activities to accumulate points, collect badges, and earn fantastic rewards. Joining the Champions community provides:

- **Community** • Join an exclusive group of school and district leaders
- **Engagement** • Share your expertise and give product feedback
- **Opportunity** • Earn rewards like swag, cool opportunities, event attendance, and more
- **Growth** • Advance professionally, build your PLN and increase your Ambassador Program eligibility

Visit [powerschool.com/champions](https://powerschool.com/champions) and SIGN UP or email [champions@powerschool.com](mailto:champions@powerschool.com) if you have questions!



 PowerSchool

**CHAMPIONS**



PowerSchool

Thank you for your Partnership!

