

# Welcome to the Special Programs PowerSchool PowerUp!



September 13, 2022

# Today's Agenda

- **Welcome and Overview**
- **Platform Release 22.6.2.0 Highlights**
- **Security Configurations**
  - Administration > Security
    - Staff Security Groups
      - Properties/Privileges
      - Document Templates
      - Members
    - Default Security Groups
    - PS SIS Role Integration
- **Closing and Next Steps**



# 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

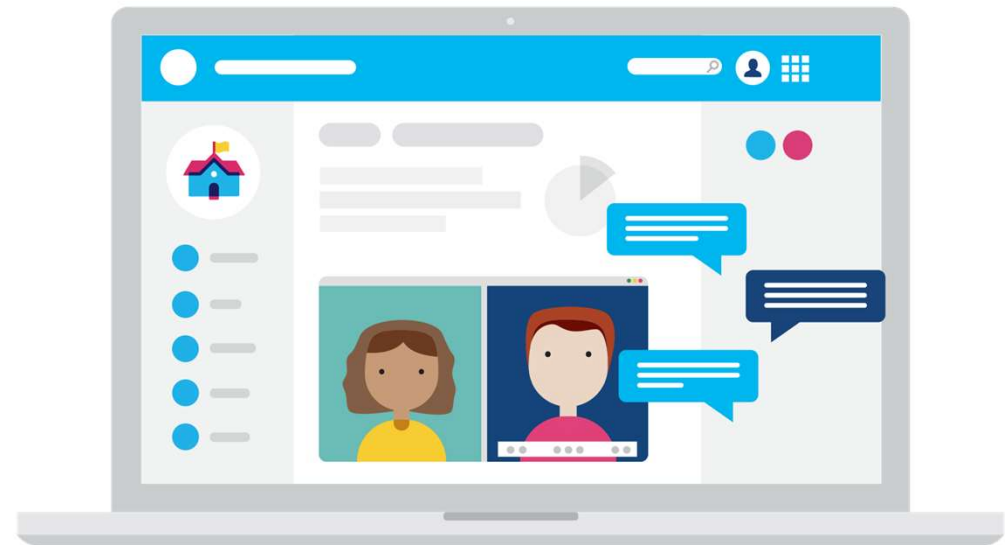


- Our Support Team is on the call to assist with technical questions.
- Please submit your questions into the Q&A during presentation.
- There will be time for additional Q&A at end of the meeting.

# PowerUps Info via PowerSchool Community

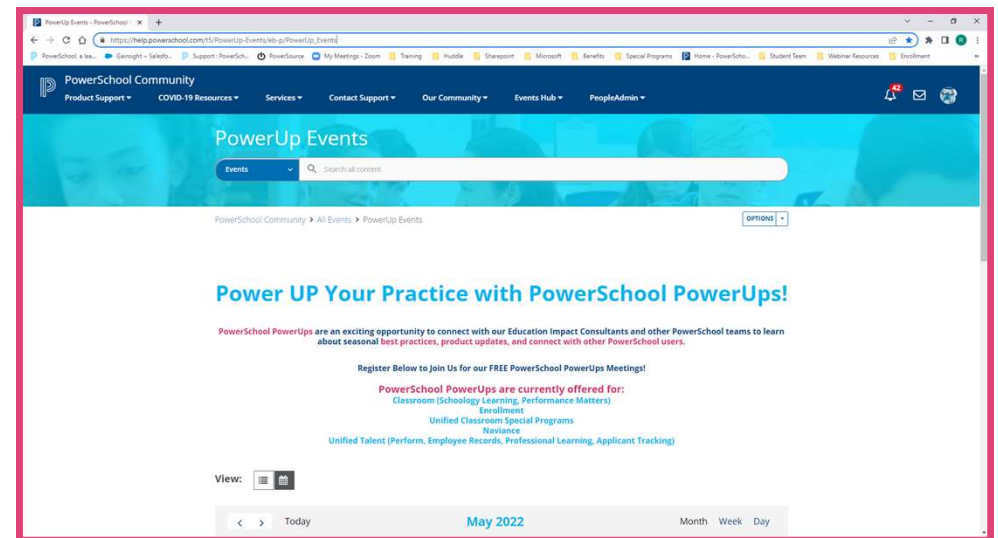
## PowerSchool Special Programs Community Page

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



# PowerSchool PowerUp Events Page

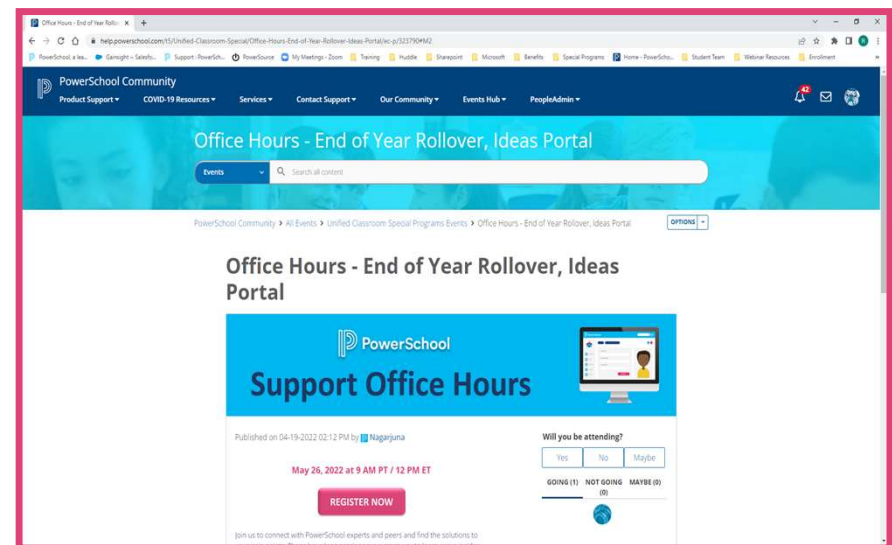
- **Register for any upcoming PowerSchool PowerUp Events!**
  - *Events Hub > All Events > PowerUp Events*
- **PowerUps are currently offered for:**
  - Classroom (Schoolology & Performance Matters)
  - Unified Classroom Special Programs
  - Naviance
  - Enrollment
  - Talent (Professional Learning,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



# Unified Classroom Special Programs Office Hours

## Register for any upcoming Special Programs Office Hours Events!

- *Events Hub > All Events > Unified Classroom Special Programs Events*
- Next Office Hours scheduled for **Sept. 29th**
- 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



# Platform Release Highlights

Version SPPL 22.6.1.0

Release Date: September 2, 2022

# New Features and Enhancements

## Digital Signature

- You will now receive a message directing you to contact your District Administrator if a Digital Signature request document has been deleted or a student profile has been archived or deleted.
- There is now a selection to notify staff when a signed document is updated on the Digital Signature Settings page. With this new setting, you can choose whether to display the message that the document was modified after it was signed at the document level.

[Learn More: Configure Digital Signature](#)

- The initial signer's responses are now shown in the document's view, edit, and print modes when the signing process is finished, even if many signers provide responses for a shared region. The responses from each signer remain in the PDFs.

[Learn More: Send Signed PDF](#)

## Student Transfer

- Student transfer envelopes now expire after ten days. Previously, they expired after seven days.



# Resolved Issues

## DocuSign OAuth 2.0 Upgrade

- Resolved an issue where staff accounts were receiving an error when updating DocuSign access; Updating admin user access is working as expected.

## Resolved Issues – DocuSign

- Resolved an issue caused by a third-party document management partner that prevented DocuSign users from checking boxes or seeing the signature icon on the document

## Student Caseload

- Resolved an issue caused by staff having excessive students in their caseload; Staff members can now create multiple caseload groups to help manage their caseloads. (400 initial students are listed on the homepage.)

[Learn More: Manage Caseloads](#)

## Student Profile Archive

- Resolved an error that prevented restoring archived student profiles

## Student Transfer

- To generate a student transfer envelope, a staff member must have the privilege to view the child profiles. These child profiles should be added to the Transfer Notification security group. When creating a transfer envelope, staff members cannot access or select child profiles that they do not have the privilege to view.

# Security Configurations

# Security Groups

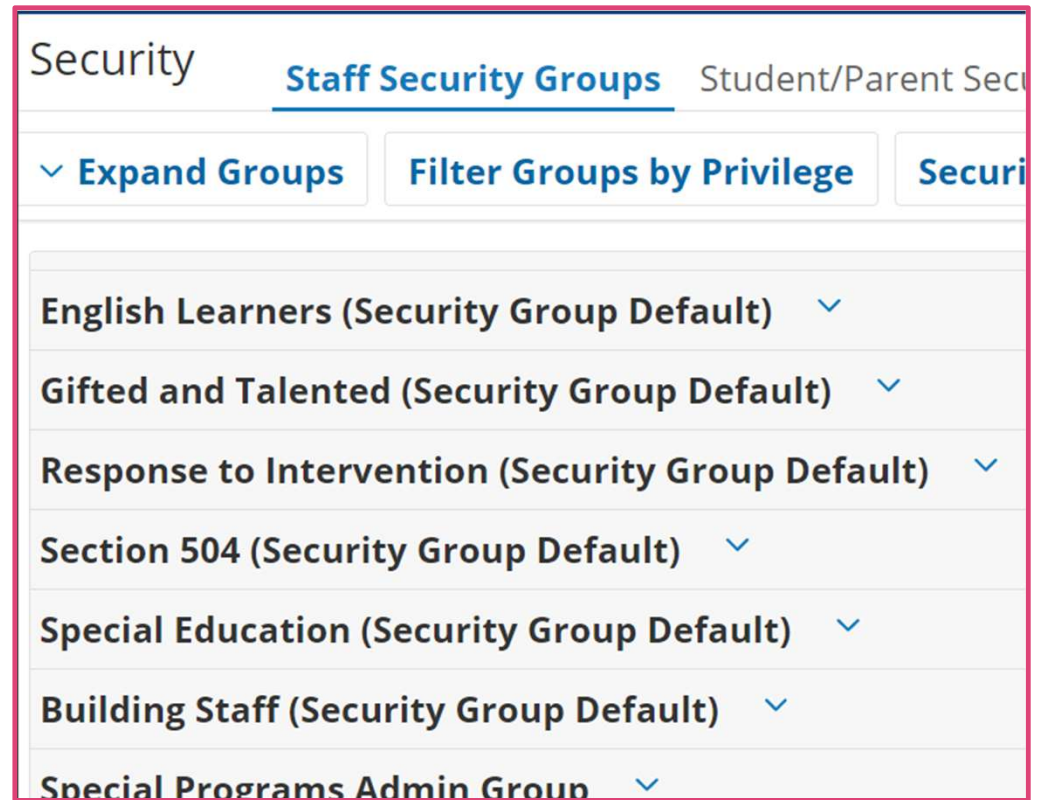


- PowerSchool Special Programs comes with a **pre-defined set of security groups**
- Each user type is assigned to a security group that **defines the function or role that users of that user type can perform** such as: curriculum administration, student assessment, teachers, child study team members, and so forth
- The members of a security group have **access privileges associated with that group**

# Security – Staff Security Groups

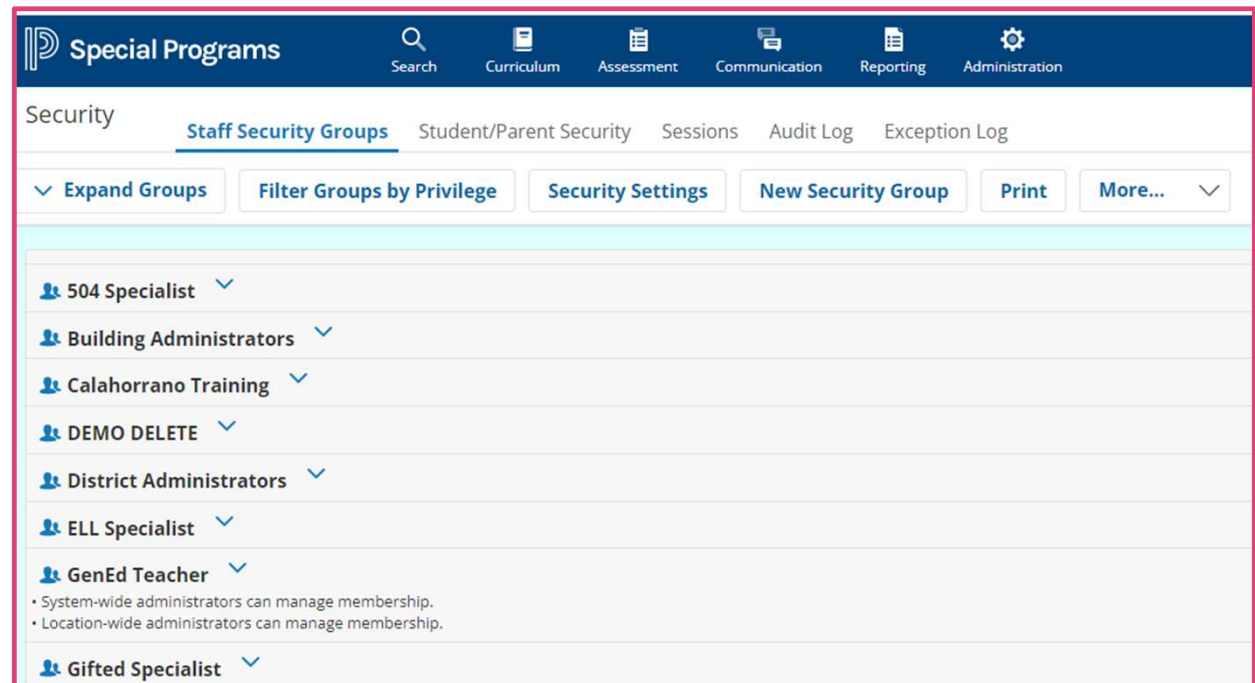
## Default Security Groups:

- Special Programs Admin
- Special Education
- Gifted and Talented
- Section 504
- Response to Intervention
- English Learners
- Building Staff



# Security – Staff Security Groups

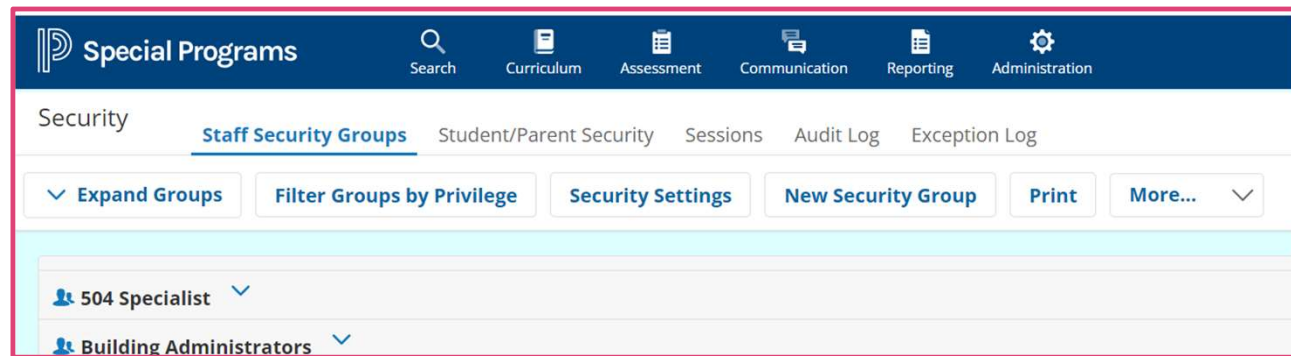
- Pre-defined set of Security Groups
- Groups designed for Instructional and Special Programs Management



*Administration > Security*

# Security - Staff

- Ensure users have access to information and functionality
- Prevent access to information that is inappropriate for the user's role or designation



*Administration > Security*

# Security - Staff

Security configuration includes setting up:

- Properties/Privileges
- Members
- Document Templates

Staff Security Groups > Special Education Administrators

Properties/Privileges Members Document Templates

Edit Properties/Privileges More...

### Special Education Administrators - Properties/Privileges

Privilege Set	
Communications / Calendar	(+) Send Messages (+) Send Announcements (System-Wide)
Reports	(+) Create Private Standard Reports (+) View Public Standard Reports (+) Create Edit Public Standard Reports (+) View Advanced Reports

Staff Security Groups > Special Education Administrators

Properties/Privileges Members Document Templates

Filter by: (None)

Add Members Remove Members More...

### Special Education Administrators - Members

K < 1 2 3 4 > X Page size: 20

	ID	Last Name	First Name	Works At
🔒	TRAIN97	Account97	Training	Warren Area HS
🔒	TRAIN79	Adams	MelissaM	Upper Adams MS
🔒	TRAIN83	Alba	Anna	Silver Spring El Sch

Staff Security Groups > Special Education Administrators

Properties/Privileges Members Document Templates

Select Template/Category: (Summary)

### Special Education Administrators - Template/Category Rights Summary

Document Templates/Categories	View/Edit Rights					
	View	View Final Only	View If Owner	Create	Edit Draft	Edit Review
Section 504	●		-	●	●	●
Section 504 - Plan	●		-	●	●	●
Section 504 - Meeting Notice and Invitation	●		-	●	●	●
Section 504 - Eligibility	●		-	●	●	●
Section 504 - Manifestation Determination Review	●		-	●	●	●
Parents Rights	●		-	●	●	●
Authorization for Release/Exchange of Information	●		-	●	●	●
Written Notice/Consent	●		-	●	●	●

# Modifying Security Privileges

1. Start on the Properties/Privileges tab
2. Navigate to the feature panel and modify the privileges as needed
3. If you are changing Student Profiles from System-wide to Location-wide, all privileges must match
4. Click Accept

Student Profiles & Documents Privileges	
View Students	Grant (+) System-Wide
Add Students	Grant (+) System-Wide
Edit Students	n/a
Delete Students	Deny (-) System-Wide
	Deny (-) Location-wide
Deactivate	n/a



## Please Note:

- System-wide indicates access to all data district-wide
- Location-wide indicates access to only building data based upon the user's active locations in SIS



# Modifying Document Template Security

1. Select Document Templates tab
2. Click the magnifying glass icon to select the document template
3. Modify the View/Edit Rights

Staff Security Groups > Mv LEA Gifted Building Coordinator

Properties/Privileges Members Document Templates

Staff Security Groups > 1 Gifted and Talented Administrator (Security C Utilities

Properties/Privileges Members Document Templates Security Configuration

Select Profile Type: **Students** Select Template/Category: **Gifted Education Plan**

**Gifted and Talented Administrator (Security Group Default) - Template Rights for 'Gifted Education Plan'**

2 (Edit)

	Document-Wide View/Edit Rights								Status Change Rights			Print	Review Acknowledge	Attach Files	Edit Files by Others	Attach to Final Documents	Edit Public Statement Banks	For Final	
	View	View Final Only	Create	Edit Draft	Edit Review	Edit Final	Translate	Delete	Set Draft	Set Review	Set Final								
Document-Wide Rights	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
These rights can alternatively be assigned for individual sections																			
User must also have editing right for current document status																			
(Edit)																			
Section Name	Section-Wide View/Edit Rights																		
	View	Edit Draft	Edit Review	Edit Final	Translate														
Gifted Education Plan	X	X	X																

## Document Templates/Category

### Gifted

- Notice of Proposed Meeting for Gift
- Referral for Gifted Services
- Notification and Consent for Gifted
- Rights in Gifted Education
- Notification of Gifted Referral Screen
- Gifted Eligibility/Screening Determin
- Notification of Eligibility Determinat
- Notification of Eligibility Determinat
- Gifted Education Plan

# Document-Wide vs. Section-Wide View/Edit Rights

Related Service Provider (Customer Configured) - Template Rights for 'Individualized Education Program'

1 (Edit)

**Document-Wide View/Edit Rights**

	View	View Final Only	Create	Edit Draft	Edit Review	Edit Final	Translate	Delete
Document-Wide Rights	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

These rights can alternatively be assigned for individual sections

**Status Change Rights**

Set Draft	Set Review	Set Final
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

User must also have editing right for current document status

2 (Edit)

**Section-Wide View/Edit Rights**

Section Name	View	Edit Draft	Edit Review	Edit Final	Translate
Student Profile (Cover Page)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student Profile (Continued)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transition Goal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Annual Goal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Signature Page	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: Document Delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: Progress Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3 (Edit)

Other: Document Delivery

Other: Progress Report

Print

Review Acknowledge

Submit to DocuSign

Attach Files

Edit Files Attached by Others

Attach Files to Final Documents

Edit Public Statement Banks

Force Finalize



## Add/Edit Final section rights where documents have:

- Signatures
- Document Delivery – “Office Use Only”
- Progress Reports

# Manually Managing Membership

1. **Administration > Security > Staff Security Groups**
2. **Click to select Security Group**
3. **Click Members**
4. **Select Add Members, search for and select as appropriate**

Special Programs

Search Curriculum Assessment Communication Reporting Administration

Staff Security Groups 2 Mv LEA Gifted Building Coordinator

Properties/Privilege 3 Members Document Templates

Edit Properties/Privileges More... ▾

Add Members 4 Remove Members

Transfer Notification (Security Group)

	ID	Last Name	First Name	V
🔒	TRAIN1	Transfer	District	A



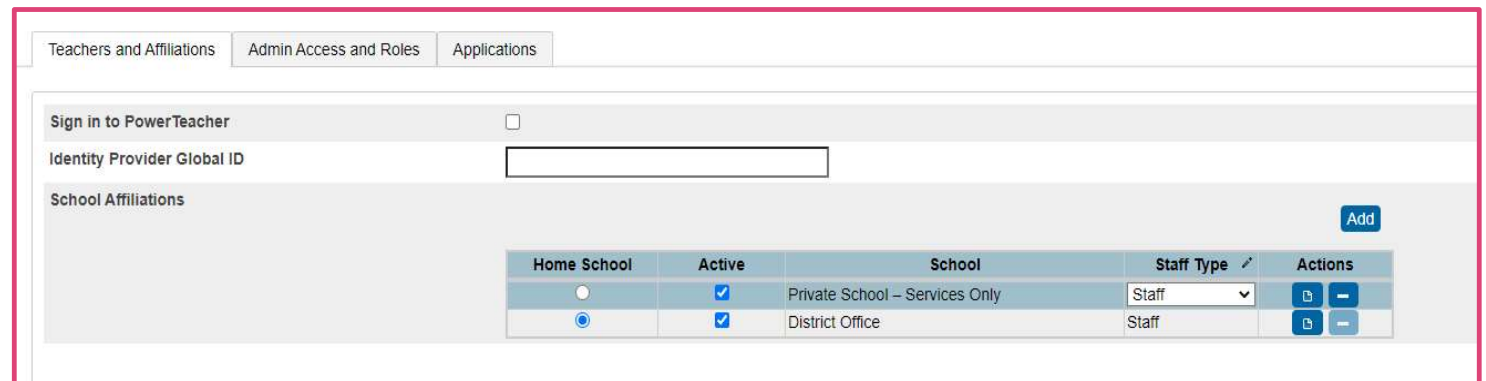
**Please Note:** Membership is assigned based upon the PS SIS User Role assignments the first time a user accesses Special Programs using SSO

- If you remove a user from the Security Group manually, the user will be re-assigned the next time the user signs in
- You can supplement the PS SIS User Roles by manually updating *additional* security groups
- You can manually assign if the user is not assigned to any PS SIS User Roles

# PS SIS Role Integration

# PS SIS Security Setup

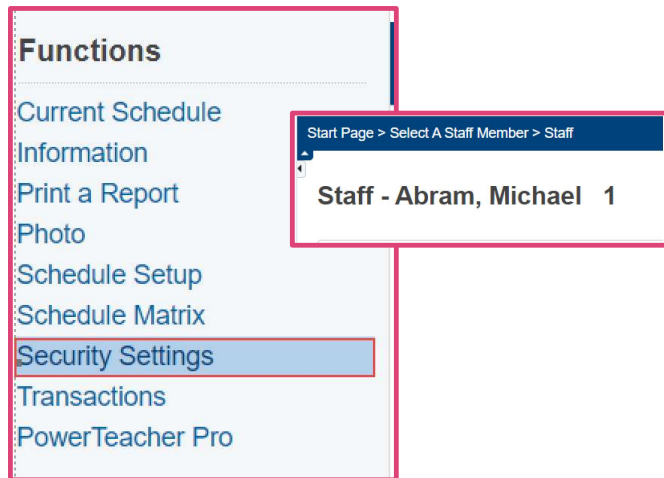
- For staff to integrate with Special Programs, add all active School Affiliations in the Teachers and Affiliations tab
- Designate Staff type (*not required*)
- Make sure Active is enabled as appropriate
- If user is set up in Admin Access Roles, the user must have School Affiliations in Teacher tab



The screenshot shows the 'Teachers and Affiliations' tab in the PowerSchool interface. It includes a 'Sign in to PowerTeacher' checkbox, an 'Identity Provider Global ID' input field, and a 'School Affiliations' table. The table has columns for 'Home School', 'Active', 'School', 'Staff Type', and 'Actions'. Two rows are visible: 'Private School – Services Only' and 'District Office', both with 'Active' checked and 'Staff' type. An 'Add' button is located to the right of the table.

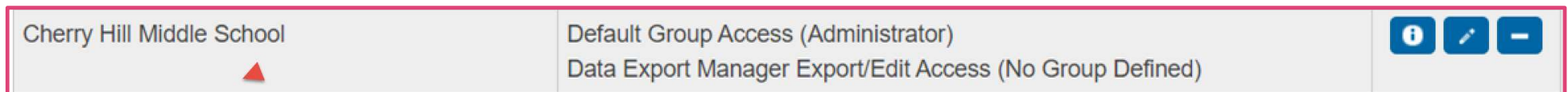
Home School	Active	School	Staff Type	Actions
<input type="radio"/>	<input checked="" type="checkbox"/>	Private School – Services Only	Staff	
<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	District Office	Staff	

# Adding Staff to a Security Role in PS SIS

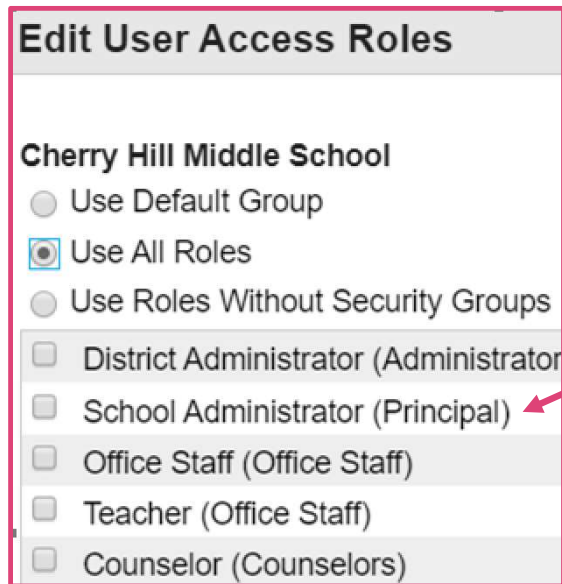


**Allow 24 hours for changes to take affect via nightly sync**

- In PS SIS, search for and select the staff and navigate to the Security settings
- Click Edit to assign the Role as appropriate for each building assignment
- Select Data Export Manager Export/Edit Access
- Assign the appropriate Special Programs Security Group



# Adding Staff to a Security Role in PS SIS



**Edit User Access Roles**

**Cherry Hill Middle School**

☐ Use Default Group

☒ Use All Roles

☐ Use Roles Without Security Groups

☐ District Administrator (Administrator)

☐ School Administrator (Principal)

☐ Office Staff (Office Staff)

☐ Teacher (Office Staff)

☐ Counselor (Counselors)

*Assign the appropriate Special Programs Security Group!*



## **Please Note:**

- **Modifying Security Roles in PS SIS requires the appropriate security privileges**



# Assigning PS SIS User Access Role

1. Click to select and open a Security Group
2. Enter the PS SIS User Access Role (maps membership from PS SIS Role upon initial sign-in)

**Edit Properties/Privileges**

**Security Group Name:** Classroom Teacher (Security Group Default)

**Category:** Building Staff (Security Group) ▼

**PS SIS User Access Role:**  (optional)  
(Must precisely match user access role name in PS SIS)

**Messaging ID:**  (optional)  
(Allows messages to be sent to all group members. This ID must be prefixed with 'X:'.)

☒ Allow system-wide security administrators to manage membership of this group.

☒ Allow location-wide security administrators to manage membership of this group.

**Accept** **Cancel**



# PS SIS Roles

- For each Active school affiliation, you must designate the appropriate role
- If more than one role, add all applicable roles

Teachers and Affiliations

Admin Access and Roles

Applications

Sign in to Administrative Portion of PowerSchool

☒

Identity Provider Global ID

Default Group

Special Programs-District (22)

Allow Admin Sign in During These Times:

☒ Any time

☐ Allow this user's access from  to

(Choose times between 05:00 AM and 10:00 PM)

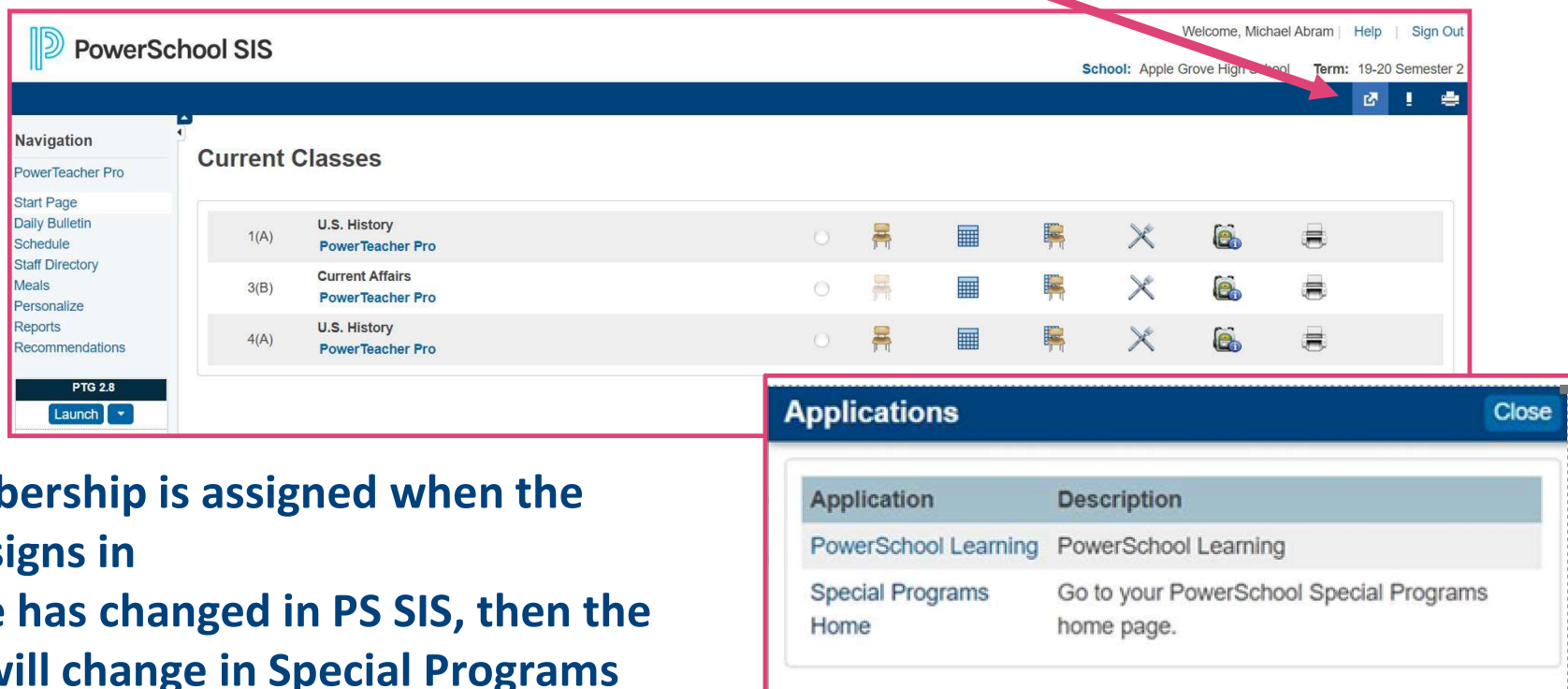
Allowed IPs

Roles and Schools

Add

School	Roles (Group Name)	Action
Meadow View Elementary School	Default Group Access (Special Programs-District) 504 Administrator (No Group Defined) ELL Administrator (No Group Defined) Gifted Administrator (No Group Defined) RTI Administrator (No Group Defined) Special Education Administrator (No Group Defined) SPED District Administrator (No Group Defined)	<div><div></div><div></div><div></div></div>

# Accessing Special Programs: Single Sign On with PS SIS



The screenshot displays the PowerSchool SIS interface. At the top, the header includes the PowerSchool SIS logo, a welcome message for Michael Abram, and links for Help and Sign Out. Below the header, the 'Current Classes' section lists three classes: 1(A) U.S. History, 3(B) Current Affairs, and 4(A) U.S. History, all using PowerTeacher Pro. A red arrow points from the title 'Accessing Special Programs: Single Sign On with PS SIS' to the 'Applications' dropdown menu. The 'Applications' dropdown is open, showing a table of applications.

Application	Description
PowerSchool Learning	PowerSchool Learning
Special Programs Home	Go to your PowerSchool Special Programs home page.

- Membership is assigned when the user signs in
- If role has changed in PS SIS, then the role will change in Special Programs upon next sign in

# Special Programs PowerUp Events and Office Hours

**September 29:** Office Hours – **Topic:** *Security Configurations*

**October 27:** Office Hours – **Topic:** *Template/Easy Edit*

**November 8:** Special Programs PowerUp

**November 24:** Office Hours – **Topic:** *Utilities/Transfer Envelopes*

**December:** *No PowerUp or Office Hours*



# 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



# 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

# 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

# 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

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# Thank you for your Partnership!