

Welcome to the PowerSchool Employee Records PowerUp!

Personalized Education for Every Journey

Optimizing HR Efficiency through Strategic Use of Contracts and Letters

Dhivya Sudarshan— Education Impact
Consultant

October 8, 2024



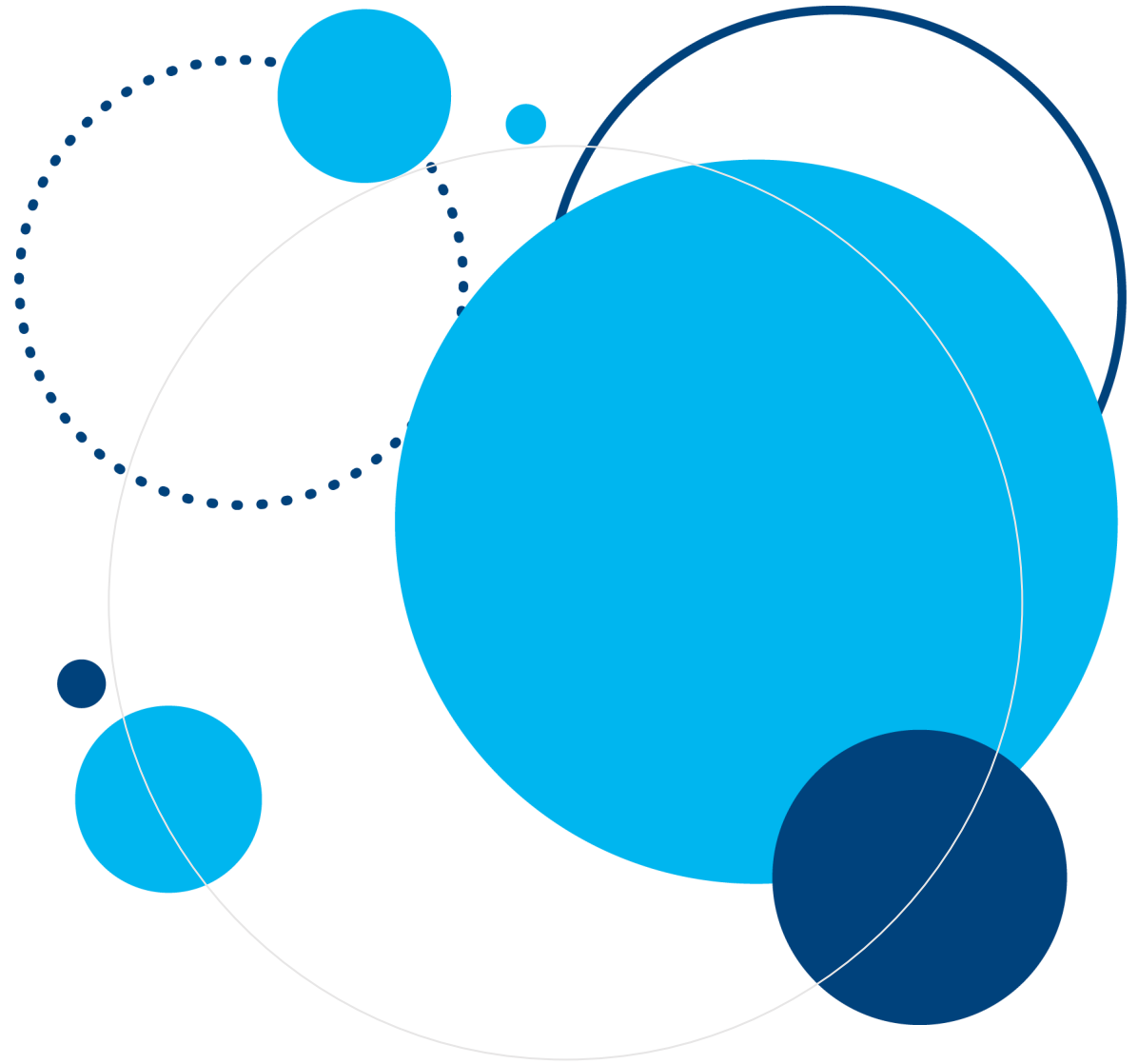
Agenda

- 1 Introduction to Contract and Letters
- 2 Advantages of using Contracts and Letters
- 3 Understanding Contracts and Letters
- 4 Q&A



Personalized Education
for Every Journey

Introduction to Contracts and Letters

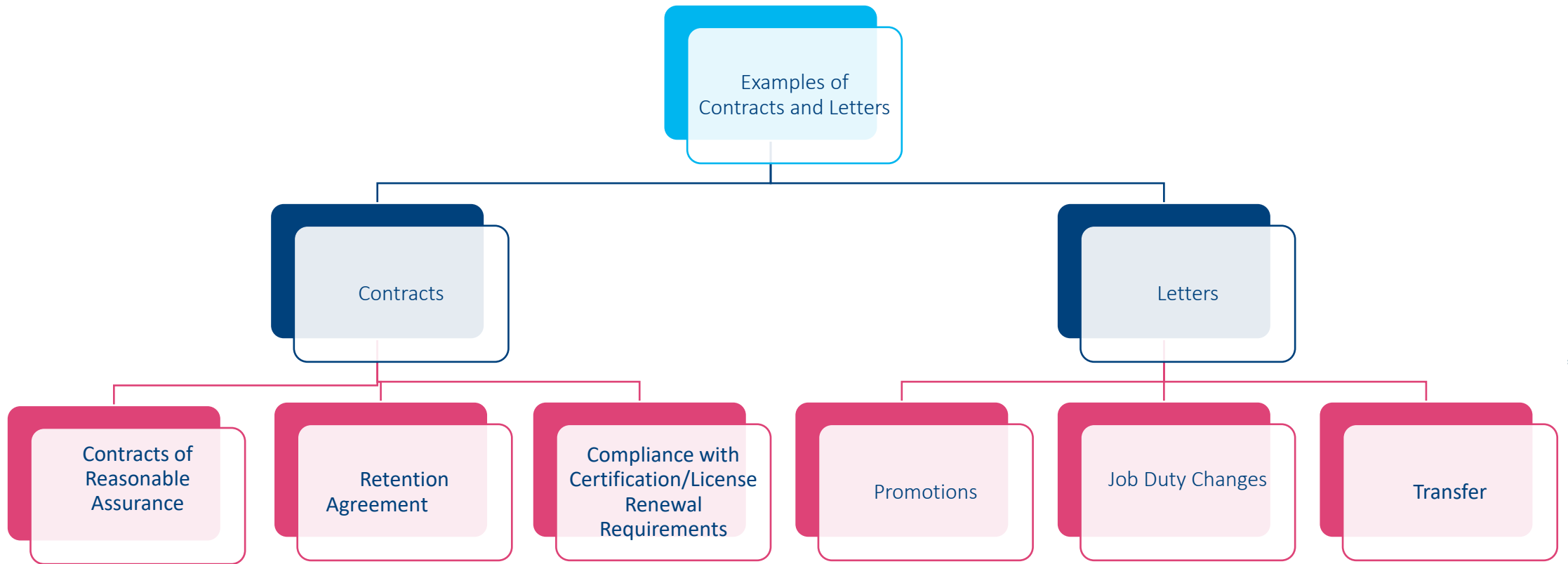


Contracts and Letters

Contracts and Letters feature is a useful tool used to manage and track important documents related to Employee Agreements and Communications.

Contracts are used to store and manage Employee contracts, which are formal agreements outlining the terms of employment, such as job responsibilities, salary, benefits, and duration of employment.

Letters are used to manage various types of formal communications like Promotion, Salary changes, Performance evaluations, etc.



Advantages of using Contracts and Letters

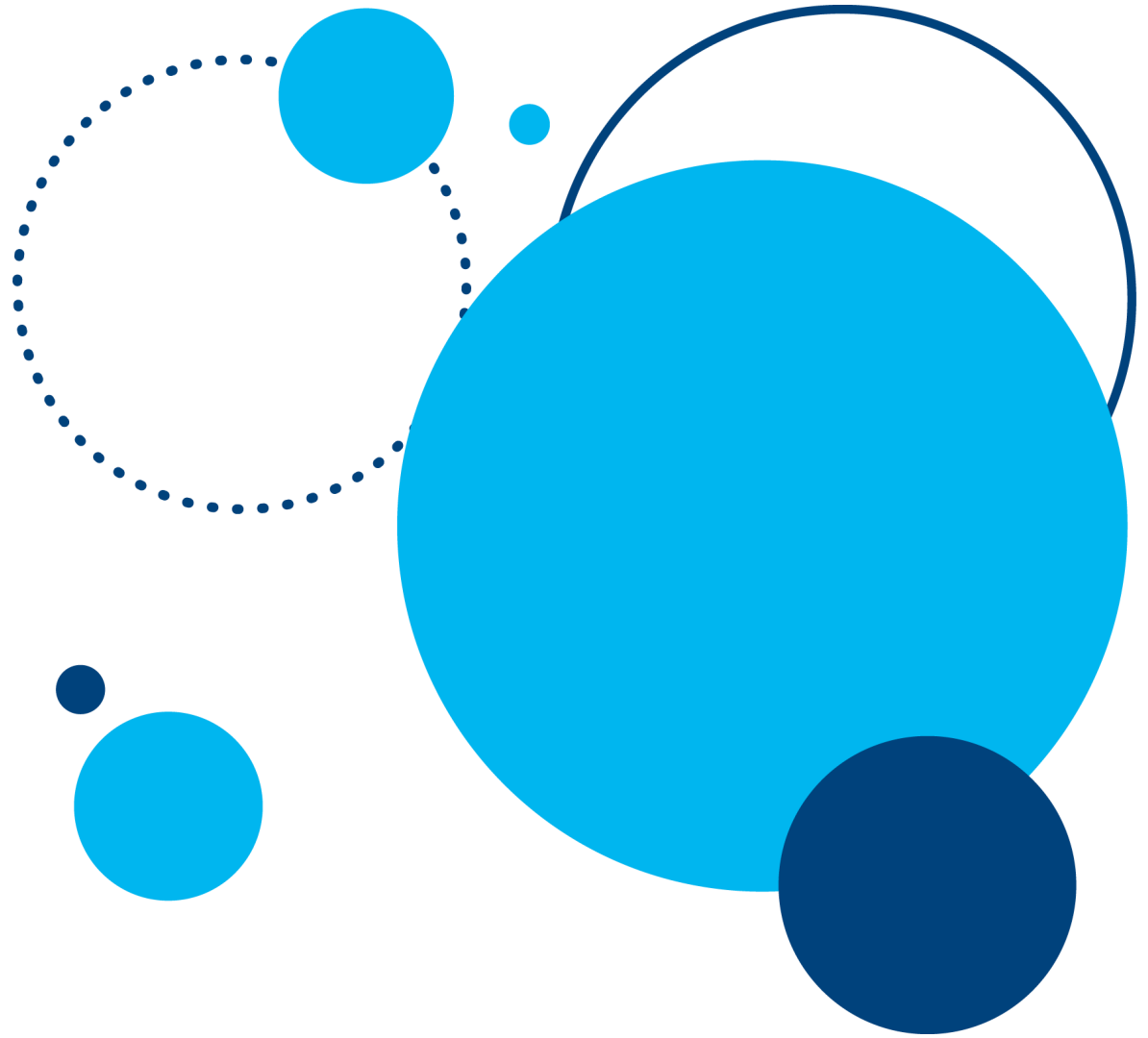
Keeps all critical documents related to an employee in one place, making it easier to manage and retrieve information.

Helps ensure that important documents are filed and accessible for compliance and record-keeping purposes.

Streamlines the process of handling employee records by consolidating documents in a digital format, reducing the need for physical storage and manual tracking.

 **Personalized Education**
for Every Journey

Creating Contracts and Letters



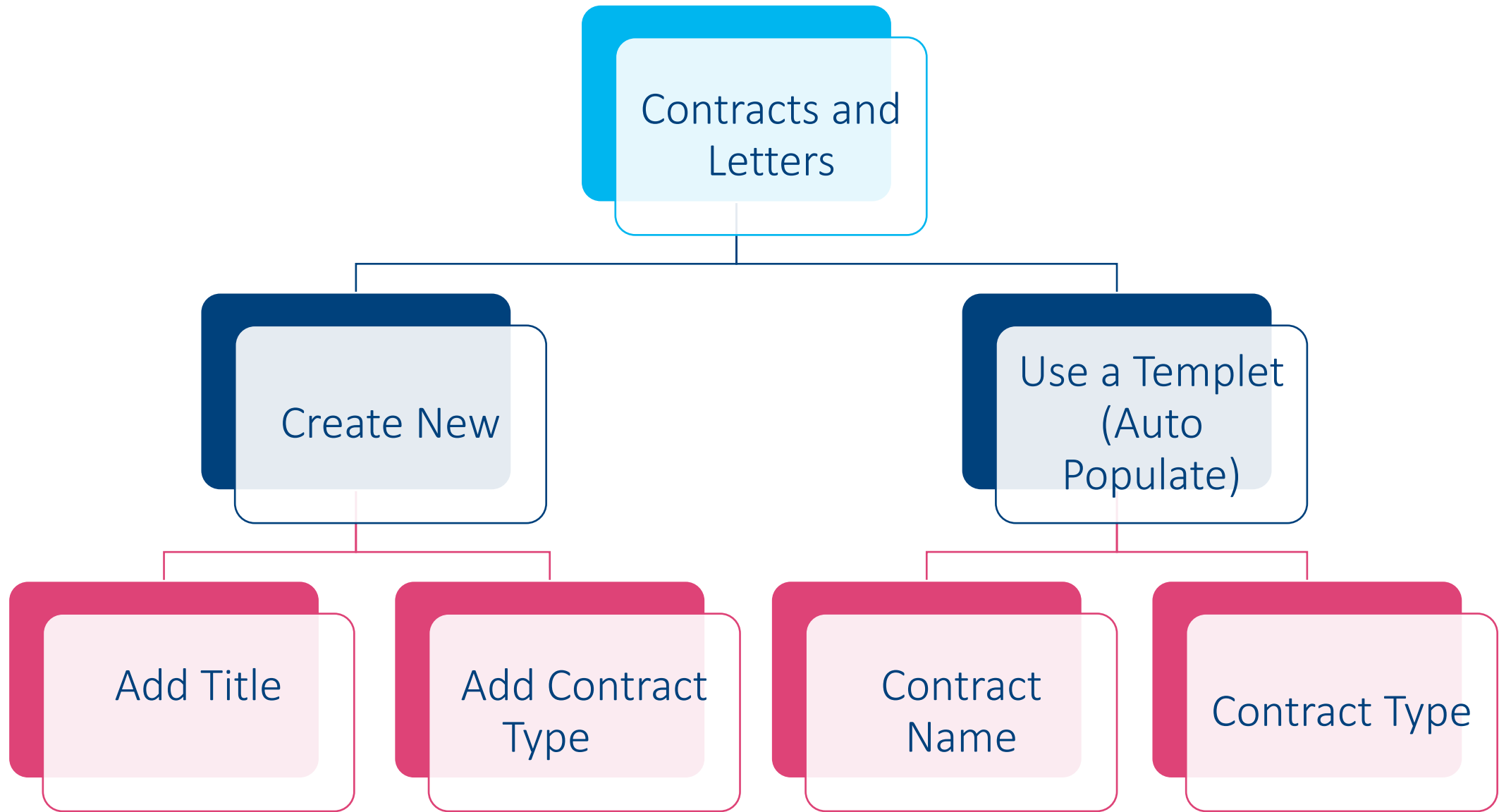
Benefits of Creating Templates for Contracts

Consistency and Standardization:

- Ensure all contracts follow similar layout.
- Maintain consistency across all employee agreements

Efficiency and Time Savings:

- Ability to create multiple templates in the system for various purposes **like Renewal, Promotions**. Avoid starting each Contract from scratch.



Accessing Contracts and Letters

You can access Contracts and letters Clicking Contracts and Letters on the Employee Records page.

Unified Talent
Employee Records

My Tasks

Needs Attention Completed

All

Task	Related Staff	Checklist	Due
No Rows Found			

Contracts and Letters

Reports

Configuration

SUPPORT

Benefits of Mail Merge tags and Content from Records

Customized Content:

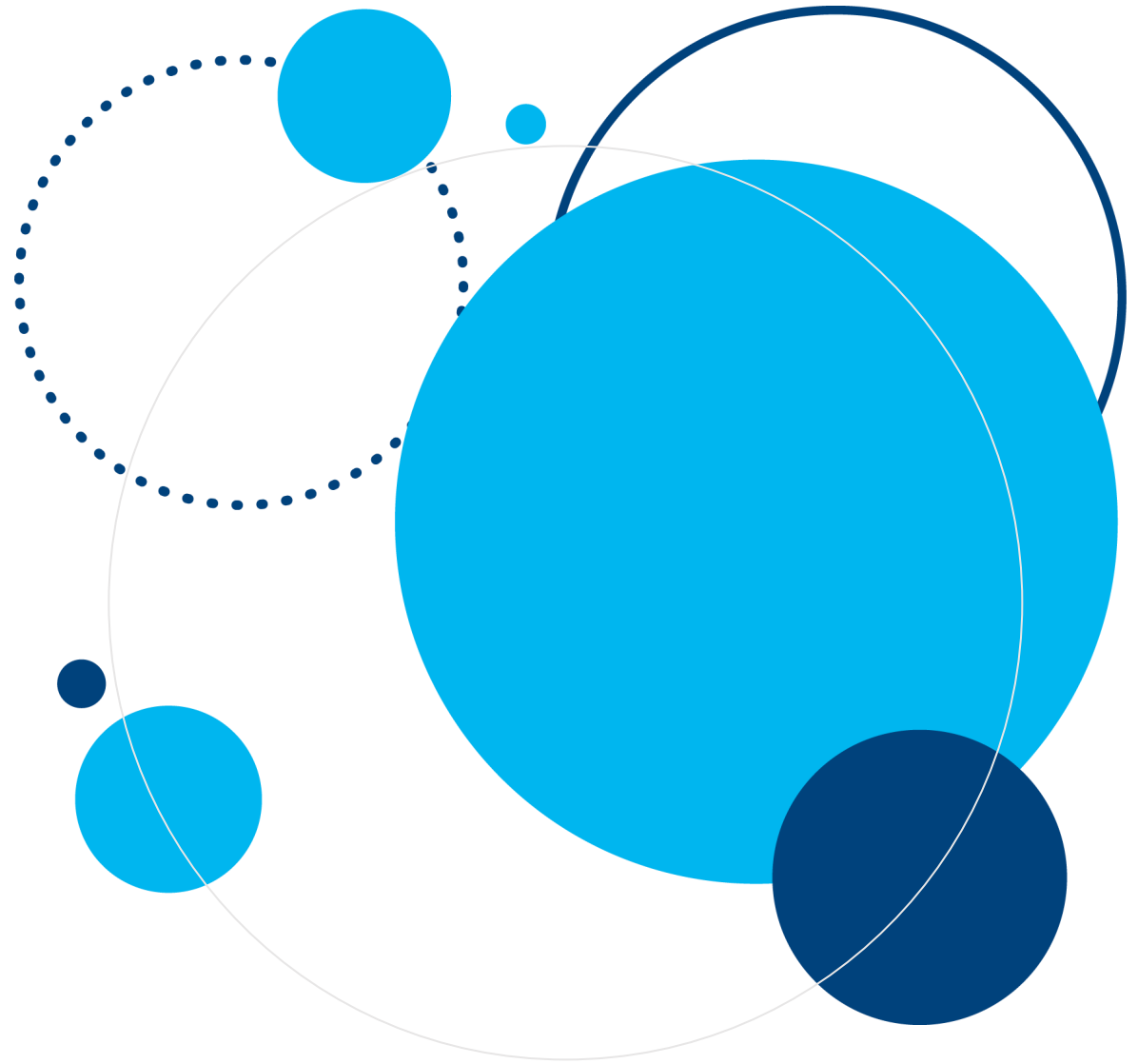
- Insert Place Holders for personalized data (eg Current Salary, updated Salary) into documents.
- Maintain a uniform format while customizing content.
- You can Pull in future data as well.

Content from Records:

- They are mail merge tags prebuilt in the system.
- Save time by reducing manual entry and repetitive tasks.

 **Personalized Education**
for Every Journey

Adding Employees to Contracts



Bulk Import within Contracts

Easy Import Functionality

- Import Multiple Employees simultaneously.
- Streamlined Processes for assigning Contracts.

Simplified HR Process

- Ability to send the same Contract to Multiple Employees thus saving a lot of time for HR.
- Avoids repetitive manual Entries thus reducing Administrative workloads.

Ease of Use

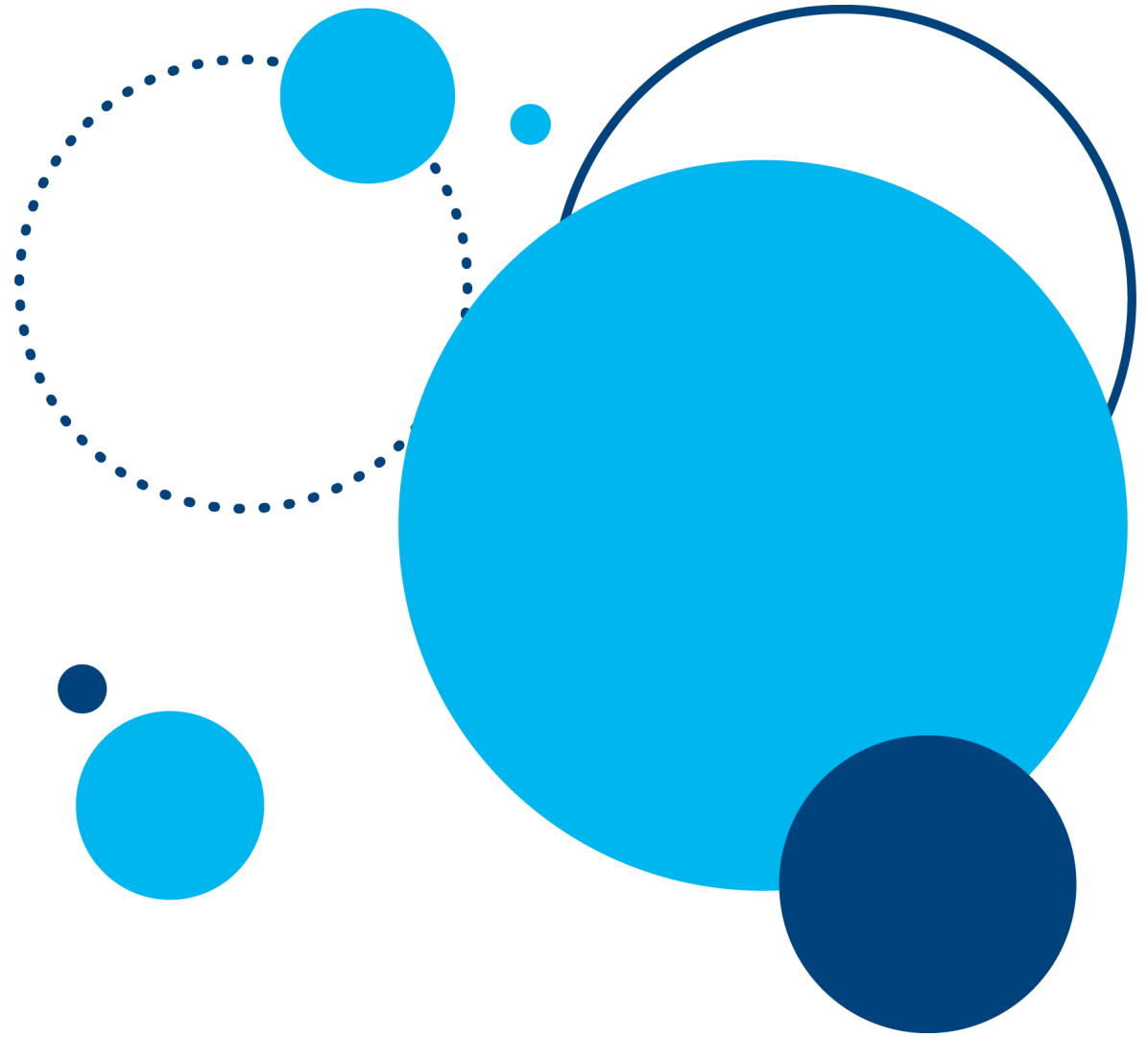
You can add people to Contracts using Quick add feature.

You can schedule the Contracts to go out on a certain date to all employees or right away.



Personalized Education for Every Journey

Sending Contracts



Compliance and Documentation

Maintain accurate and complete records for audits and legal requirements.

Ensure compliance with company policies and legal standards.

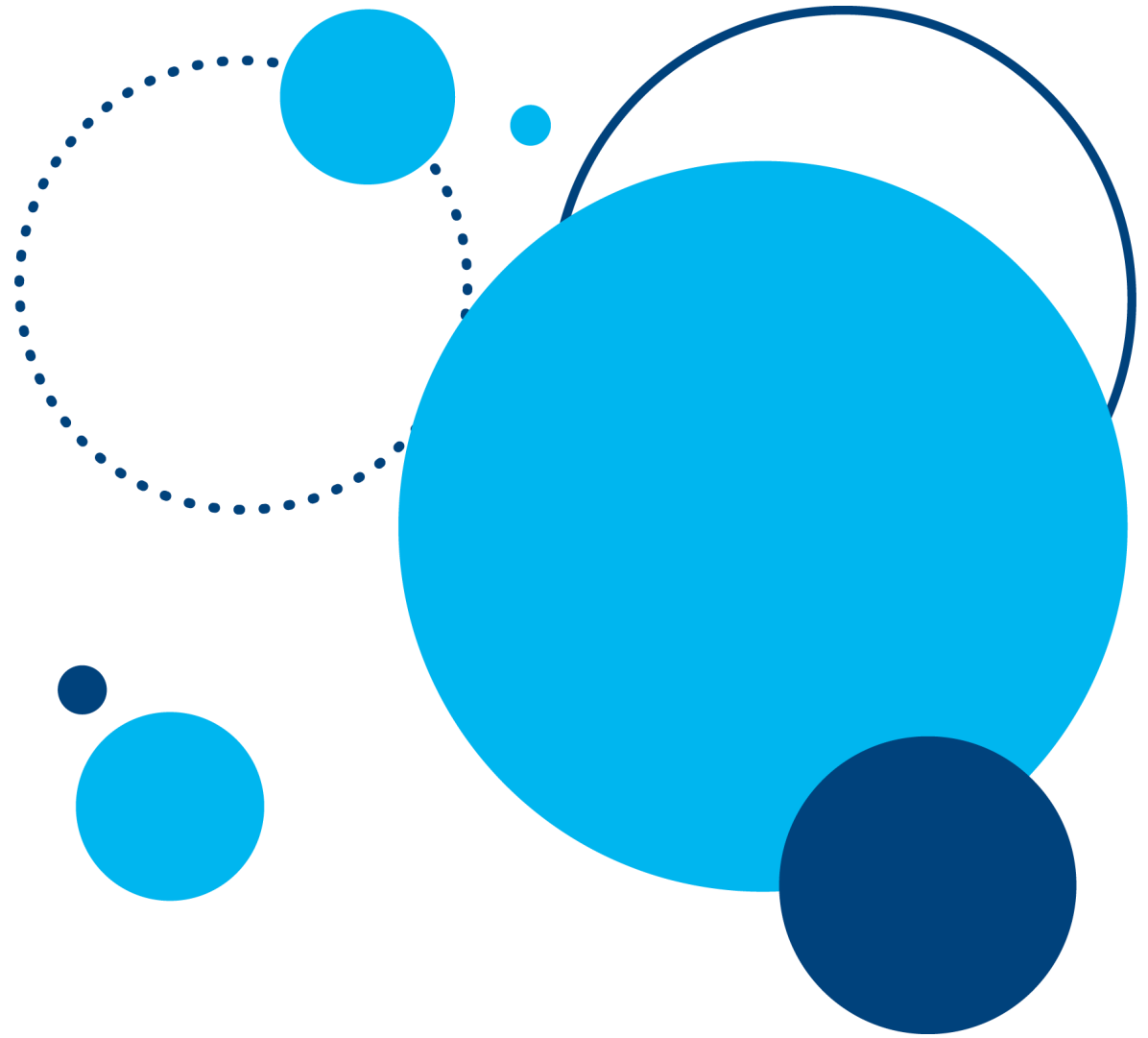
It acts as a Centralized repository for all contracts and correspondence.

Data is stored in the cloud, ensuring easy accessibility for HR Staff.

Restrict access to sensitive information based on roles.

 **Personalized Education**
for Every Journey

**Contracts Workflows
and Folders**



Contracts Workflows and Folder

Steps of the Workflow

- You can add multiple steps as needed to the Contracts Workflow.

Contracts and Agreements Folder

- Once the steps of the Workflow are completed the Contracts will land in the specific folder defined based on the settings and the Workflows.

Contract Signatures

The Employee can then review the Contract and sign the same.



Contracts & Agreements

New Hire (005)

Please Click to View/Hide the Workflow

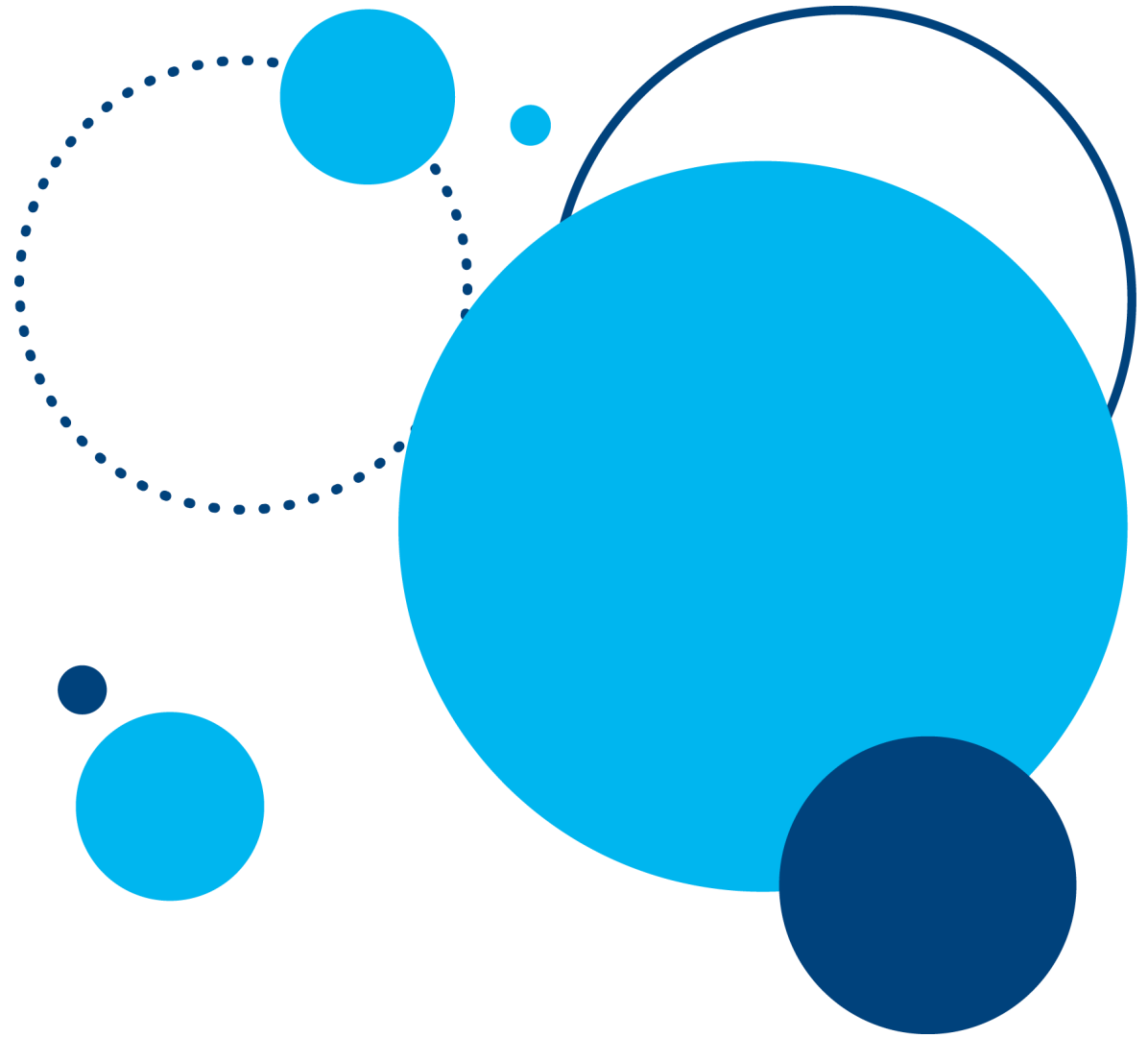
Sign

Current User	Dhivya Sudarshan
Date	2/20/2023
Signature <small>required</small>	<input type="text"/>
<input type="checkbox"/> I have read and accept the Electronic Signature Statement <small>required</small>	

Close Print Print as PDF **Submit**

 **Personalized Education**
for Every Journey

Contracts Status and Reporting



Contracts Status and Reporting

Contract Status

- You have detailed log of when the Contract was created, viewed and signed within the system.

Reporting

- You can draw detailed reports about a single Contract or multiple Contracts and Export the results.

Contract Status and Export

The Status of the Contract changes to Completed, based on the Workflow steps and settings.

You can review a Report on the Contract by selecting the Report Icon.

New Hire (005)
Review your list of recipients and personalized content to spot potential issues.

Abandon Import & Start Over | Export

Send/Resend

Contract | Recipients

Quick Add | Bulk Add

Employee ID#	First Name	Last Name	Department	Current Salary	Updated Salary	Date Sent	Date Completed	Status
Userid_1135	Arjal	Jyoti	Staff	80000	90000	2/20/2023	2/20/2023	Completed

Contracts and Letters

Report | Create

Active | Archived

Search: [] | Show entries: 10

Contract	Status	Last Edited	Contract Type	Recipient Count	Report	Signed
New Hire (005)	DRAFT	9/3/2024 at 08:12 AM			Import	0
New Contract Test Signature	DRAFT	9/3/2024 at 08:10 AM			Import	0
Kish test Contract	SENT	7/8/2024 at 12:43 PM		1	Edit	1
Tuskegee Contract	SENT	7/3/2024 at 01:20 PM		1	Edit	1
New Salary Update	SENT	6/26/2024 at 10:21 AM		1	Edit	1

Contract Status and Export

You can create a Report of a specific Contract, Multiple contracts or all Contracts using the Filters

Reports

Report - 29 Signed Out of 91 Sent

Search

Filters

Completed [] [v] Archived [] [v]
Retracted [] [v] Location All Locations [v]
Supervisor All Supervisors [v] Job Types All Job Types [v]
Contract Type All Contract Types [v] Contract Sent [] To []
Contract Signed [] To []

Contract Completion Report

<input checked="" type="checkbox"/>	Last	First	Contract Name	Employee ID#	Job Type	Location	Last Viewed	Date Sent	Date Completed	Views	Status	
<input checked="" type="checkbox"/>	Koshy	Staff Amritha	Contract Test 6_11	UserId_1302			6/11/2020	6/11/2020	6/11/2020	1	Archived	Retract
<input checked="" type="checkbox"/>	SUPPORT	Candidate	New Contract Test	UserId_1170	Staff	Art	6/1/2020	6/1/2020	0	0	Completed	Retract

You can Export the Report by selecting the Export Icon.

Reports

Report - 29 Signed Out of 91 Sent

Search

Filters

Completed [] [v] Archived [] [v]
Retracted [] [v] Location All Locations [v]
Supervisor All Supervisors [v] Job Types All Job Types [v]
Contract Type All Contract Types [v] Contract Sent [] To []
Contract Signed [] To []

Contract Completion Report

<input checked="" type="checkbox"/>	Last	First	Contract Name	Employee ID#	Job Type	Location	Last Viewed	Date Sent	Date Completed	Views	Status	
<input checked="" type="checkbox"/>	Koshy	Staff Amritha	Contract Test 6_11	UserId_1302			6/11/2020	6/11/2020	6/11/2020	1	Archived	Retract
<input checked="" type="checkbox"/>	SUPPORT	Candidate	New Contract Test	UserId_1170	Staff	Art	6/1/2020	6/1/2020	0	0	Completed	Retract

Resources

- [Employee Records PowerUps Recording: Building Contracts and Letters - February 2022 - PowerSchool Community](#)
- [Support additional Workflows for | PowerSchool Community Ideas Portal \(aha.io\)](#)

Upcoming Talent PowerUp Meetings

- **Applicant Tracking:** Reflecting on the Hiring Season & Identifying Trends
 - Wednesday, October 16, 2024 at 9 AM Pacific
- **Perform:** (Product) New Task Dashboards & Best Practices with Grouping Tasks
 - Tuesday, November 5, 2024 at 9 AM Pacific
- **SmartFind Express:** Improving Fill Rates o Tuesday,
 - October 8, 2024 at 9 AM Pacific



