

# Welcome to the PowerSchool Employee Records PowerUp!

 **Personalized Education**  
for Every Journey

# Structuring E-Form for Practical Use

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# Agenda

1 Reviewing E-Form Types

2 E-Form Question Types

3 Examples

4 Q&A

# Important Elements of E-Forms

## Basic

Fillable Fields

Basic Employee Information Fields

HTML

## Mixed

Fillable Fields

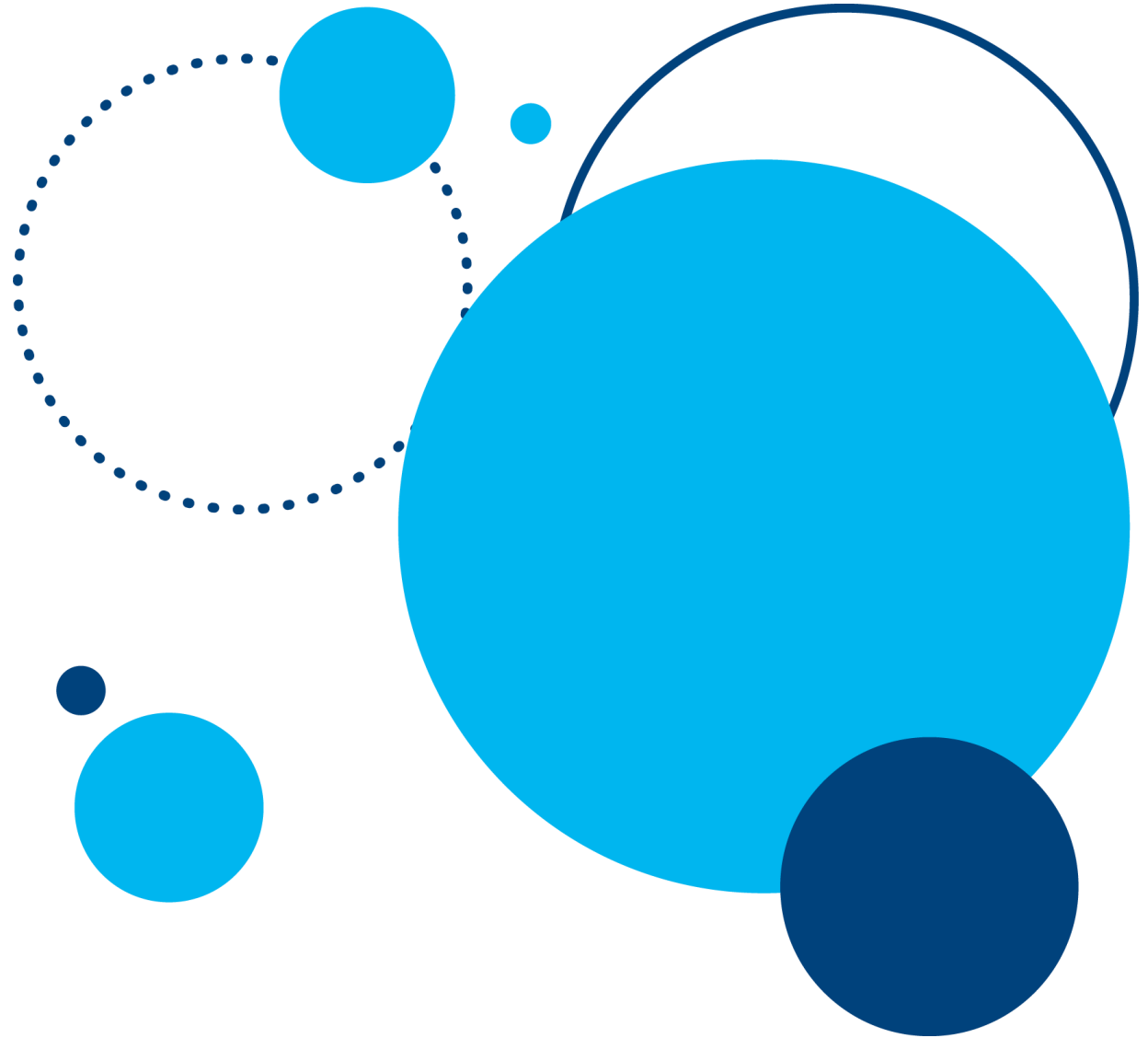
Basic Employee Information Fields

Use an existing PDF

Calculations

# Things to Consider

- Does the form need to look a specific way?
- Do you want to embed a video?
- Do you need to include calculation?
- Do you want to report on hidden fields?
- Are their fields needed for conditional workflows?
- What type of reporting needs do you have for the form?
- Do you need the signature on the form?



# Question Types

Question Type	Basic	Mixed
Basic Employee Information	✓	✓
Library Resources	✓	✗
Short Answer	✓	✓
Long Answer	✓	✓
Long Answer Matrix	✓	✗
Multiple Choice - Dropdown	✓	✓
Checkboxes	✓	✓
Grid	✓	✗

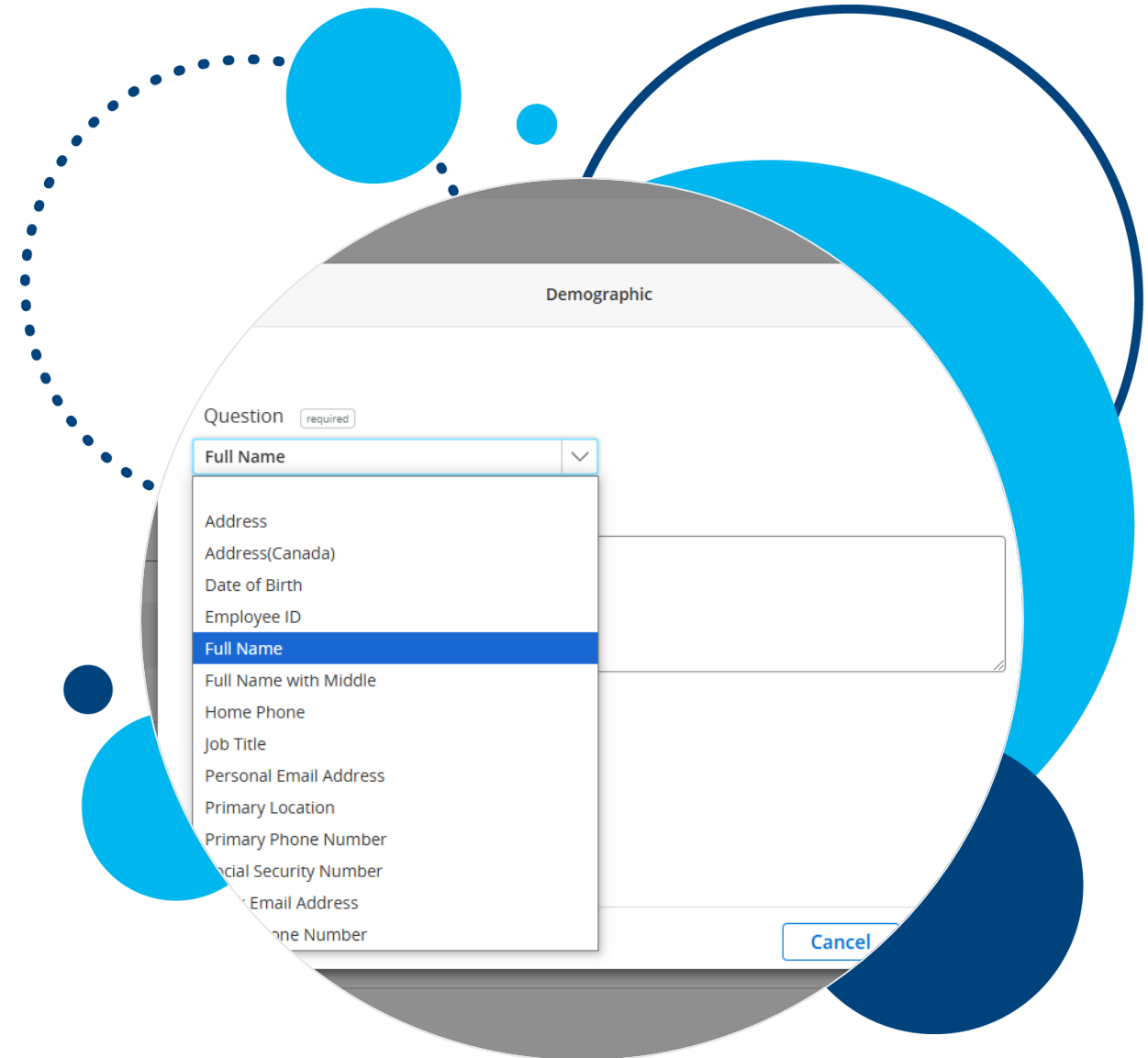
Question Type	Basic	Mixed
Matrix	✓	✗
Date	✓	✓
Table	✓	✗
Section Header	✓	✗
Paragraph	✓	✗
Signature Line	✓	✓
Radio Button	✗	✓
Calculation	✗	✓

# Basic Employee Information Fields

- Default to the Direct Report's profile information
- Do you want the information to be editable? Changes profile
- Utilize for ease and lock question from Direct Report and Supervisor

## Date Picker

- Allows date to be selected or a standard date filled into the form
  - Default Answer
  - Default Today's Date



# Library Resources (Basic)

- Links library resource directly into the form
- Allows you to house content such as PDFs and photographs within Employee Records

## Link (Mixed)

- Link to resources housed in other places

Upload File

Name \*

Require users to sign this resource

\* Indicates a required field



# Anecdotal Response

- Utilized for free form responses:
  - Feedback
  - Additional Details
  - Unpredictable Responses
  - Does not support conditional workflows

## Plain Text Box (Mixed)

- Settings allow for character limit

## Rich Text Box (Mixed)

- Settings allow for character limit

## Short Answer (Basic)

- Settings allow for plain or rich text

## Long Answer (Basic)

- Settings allow for plain or rich text

# Matrix – Grid – Radio Button – Table

## Matrix (Basic)

- Matrix can be used to have standard ‘scoring’ of a rubric while providing rubric description – does not support calculation

## Long Answer Matrix (Basic)

- Matrix with a long answer box underneath the selection for evidence or response

## Grid (Basic)

- Grid with standard column ‘scoring’ – does not support calculation

## Radio Button (Mixed)

- Can be utilized with a PDF with a matrix or grid background to collect responses

## Table (Basic)

- No scoring to report and only allows table responses to be recorded

# Multiple Choice/Dropdown – Radio Button

Utilized when a standard response is needed

## Multiple Choice (Basic) / Dropdown (Mixed)

- Both use Code Sets to provide a multiple-choice drop-down box.
- Both can be utilized for conditional workflows
- Dropdown in mixed forms can be used with calculations

## Radio Button (Mixed)

- Allows you to select one option from multiple choices
- Can be used in conditional workflows
- Can be utilized with calculations

# Signature



## Signature (Mixed)

Allows signature on the form  
Consider whether signature of filer needs to be  
in workflow if collected here



## Signature Line (Basic)

Places a signature line on the form to be utilized  
if form was printed  
Is not an electronic signature

# Checkboxes

- Found in Basic & Mixed Forms
- Allow more than one response to be chosen
- Cannot be utilized for calculation or conditional workflow
- Cannot group checkboxes in mixed forms – can impact required responses

What is your favorite color(s)?

Select all that apply.

Yellow

Orange

Green

Blue

Purple

# Paragraph – Section Header (Basic)



USED TO FORMAT YOUR FORM  
AND PROVIDE INFORMATION



BOTH SUPPORT HTML



CAN USE TO EMBED VIDEOS,  
PHOTOS, TABLES, ETC.

# Examples

## Basic

Utilizing Employee Records Resources

Embedding Videos or Utilizing HTML

Time vs. Appearance

## Mixed

Legal Forms or Existing PDFs

Report on Hidden Fields

Calculations





# Upcoming Talent PowerUp Meetings

- **Applicant Tracking:** (Product) Enhanced Candidate Portal
  - Wednesday, November 20, 2024
- **Perform:** Streamlining Processes with Data Transfers
  - Tuesday, December 3, 2024
- **Professional Learning:** TBD
  - Wednesday, December 4, 2024
- **SmartFind Express:** Self Auditing your SFE system
  - Tuesday, December 10, 2024
- **Employee Records:** Using Security Groups to Enhance Processes
  - Wednesday, December 11, 2024

All sessions  
will start at:  
9 PT/10 MT  
11 CT/12 ET