

Welcome to the PowerSchool Perform PowerUp!

 **Personalized Education**
for Every Journey

Effective Reporting & Exports

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Agenda

- 1 Welcome
- 2 Perform Updates
- 3 Reporting vs. Exporting
- 4 Scheduling Exports
- 5 Q&A

Personas

All personas reporting access aligns with their staff security settings

Evaluator

- Access to all direct reports they have been assigned to evaluate

Supervisor and/or Director

- Access to all direct reports they are set as a supervisor of in the employee profile or given supervisory access over in roles

Human Resources & Perform System Administrator

- Has access to all Perform staff

Report vs. Export

Report

- Quick way to get standardized data
- Can be exported to Excel
- Accessible to all personas
- Allows monitoring of progress and completion

Export

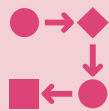
- Customizable at form and process level
- Can be included in a scheduled export
- Accessible to only HR Staff and System Admin
- Allows you pull data off of forms and processes

Evaluation & Action Plan Summary Reports

Useful for all personas to monitor current year processes



Direct Reports without Evaluation: shows all Direct Reports that do not have an Evaluation process. This report may be used when assigning processes to identify who is missing a process.



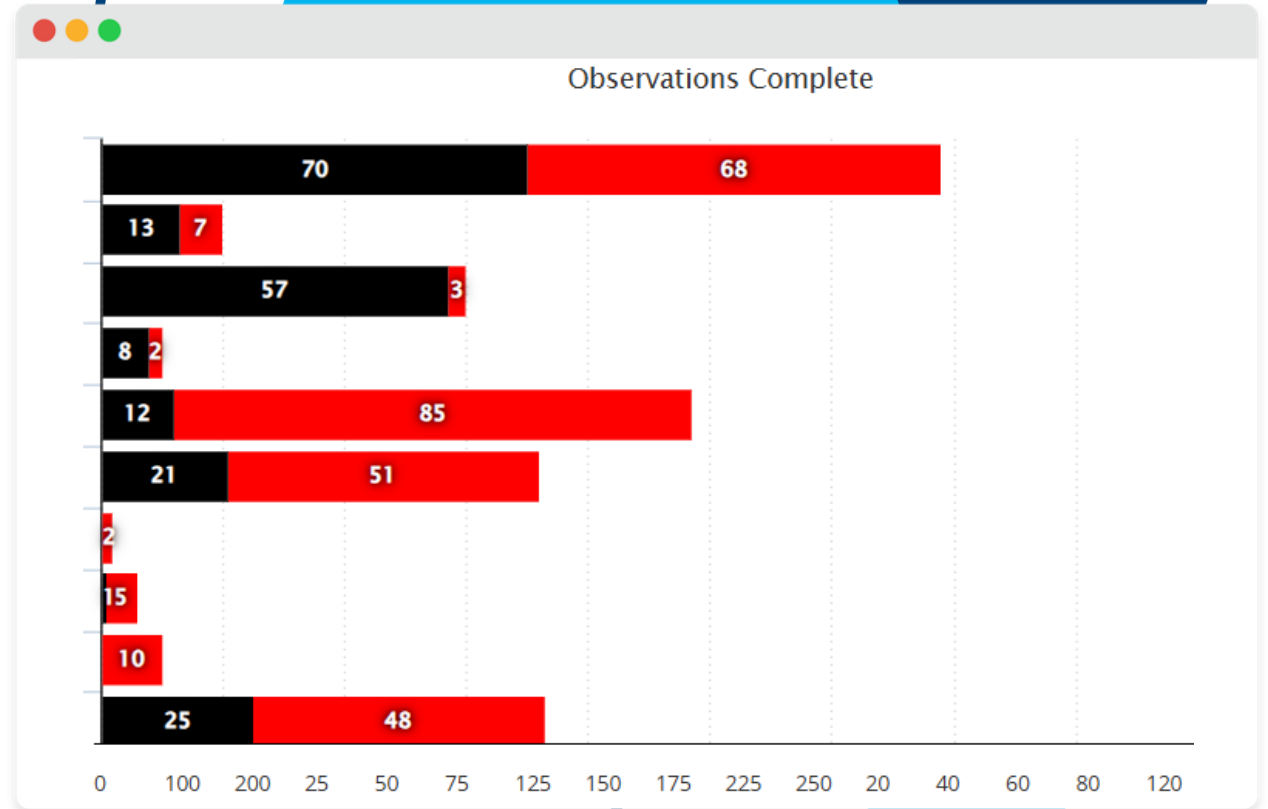
Direct Reports with Incomplete Evaluation: shows all direct reports that have started an Evaluation process, but the process is not yet completed. Shows each Direct Report and the incomplete tasks in their process. If you hover over each form, you can see the title of the form.



Direct Reports with Complete Evaluation: shows all direct reports that have an Evaluation process that has been completed or marked complete.

Observation Complete

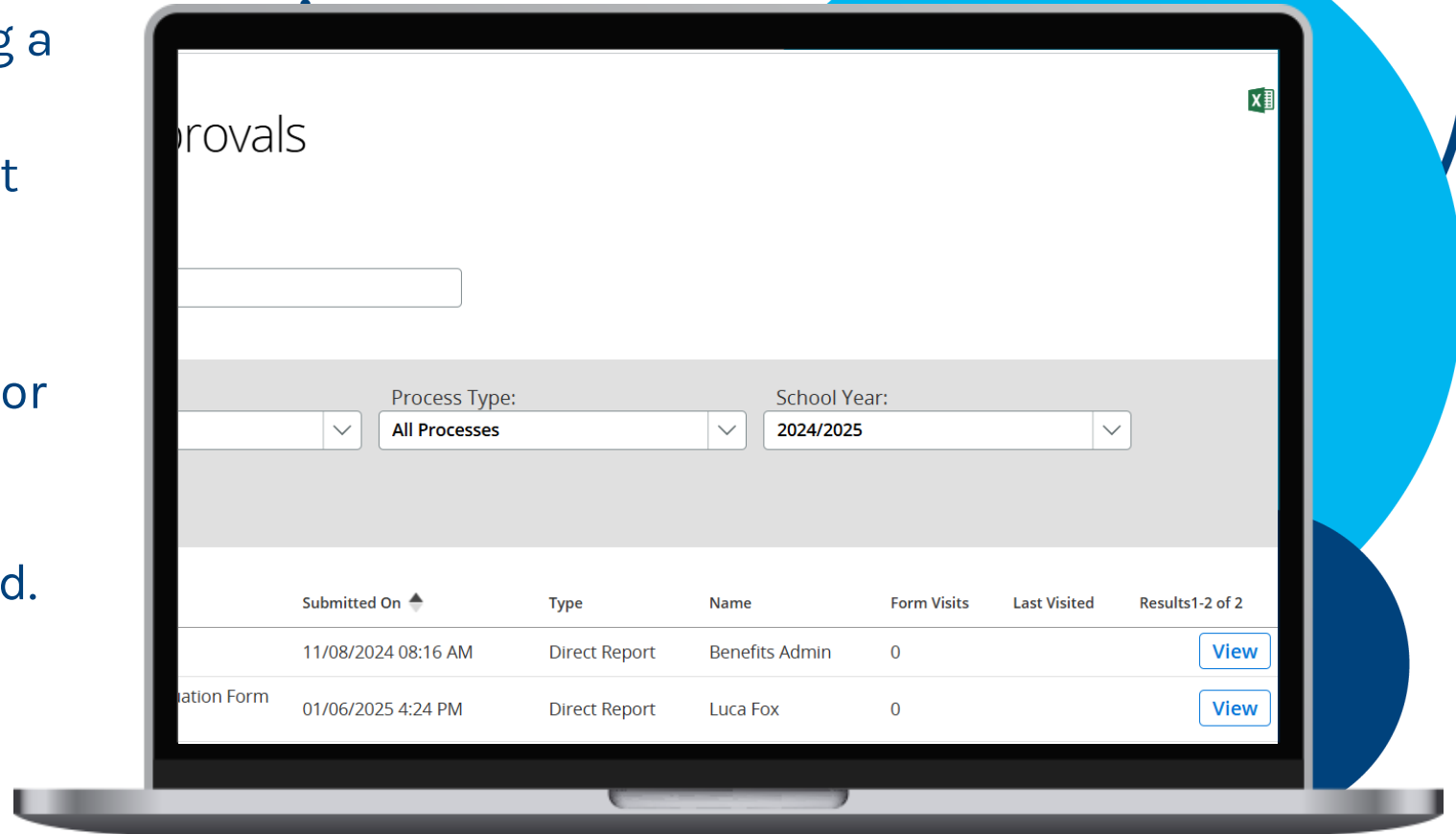
Shows all observations that have taken place in your organization. This can be filtered by school year, observation form, building type and name.



Pending Signatures

Shows all tasks that are awaiting a signature or approval. Lists:

- process that each task is a part of
- submitted date
- type of person needing to sign or approve
- person's name and how many times the form has been visited.



Walkthrough Count



Counts all walkthroughs regardless of form



Filtered by person doing the walkthrough and date



List first and last name of direct report and how many walkthroughs they've had completed on them

Best Practice

- Categorize custom forms appropriately for reporting

Custom Forms

Search:


Evaluation Evaluation Rebuttal **Observation** Lesson Preview Dismissal Action Plan **Walkthrough**

<input type="checkbox"/> Description	Last Published	Last Published By	Enabled	
<input type="checkbox"/> Administrative Observation Summary Evaluation Form ~ Tenured Educator	10/10/2022 2:30 PM		Yes	Clone Preview View
<input type="checkbox"/> CASEL SEL Self-Reflection	09/15/2022 0:32 PM		Yes	Clone Preview Edit
<input type="checkbox"/> CASEL SEL Self-Reflection	09/19/2023 5:03 PM		Yes	Clone Preview View
<input type="checkbox"/> Classroom Teacher's Summative Report	10/11/2024 09:43 AM	TalentEd Support	Yes	Clone Preview Edit
<input type="checkbox"/> Classroom Teacher's Interim Performance Report	12/20/2024 09:30 AM	TalentEd Support	Yes	Clone Preview Edit
<input type="checkbox"/> E-Folio Final	Not Published		No	Clone Preview Edit
<input type="checkbox"/> Evaluator Resource Center	08/29/2023 5:28 PM	TalentEd Support	Yes	Clone Preview Edit
<input type="checkbox"/> Evaluator Resource Center PowerUp	10/09/2023 5:28 PM	TalentEd Support	Yes	Clone Preview Edit
<input type="checkbox"/> Goal Setting for Student Progress Form - End-of-Year Review	09/12/2022 10:36 AM		Yes	Clone Preview Edit
<input type="checkbox"/> Goal Setting for Student Progress Form - Initial Submission	02/07/2024 0:54 PM	TalentEd Support	Yes	Clone Preview Edit

Best Practice

- Review completion settings in workflows for awareness

Forms Are Considered Complete When

Step 2 Is Completed 

Inter-Rater Reliability

Only available to HR Staff and System Admin

- **Inter-Rater Reliability by Standard:** identify the average scoring behavior of the evaluator population for a specific question on a form.
- **Evaluator Reliability by Form:** identify the average scoring behavior of a single evaluator in comparison to all evaluators for all questions on a specific form. This report allows you to see how close your evaluators are to the district average

Identify areas of training needed for all evaluators

Identify evaluators who need retraining and calibrating

Building Exports

Only available to HR Staff and System Admin

Export

Export data from multiple forms in multiple processes

Can add profile information

Shows date started, submitted, and completed

Evaluation Form Export

Form data from a single process

Specific school year defined

Only displays completed form data

Customizable Process Report

Add questions from multiple forms in a process

Data from complete forms is displayed

Must define process and school year

Customizable Forms Report

Pulls form data regardless of process

Select individual form questions

Data will aggregate

Can add profile information

Scheduled Saved Exports

Schedule an export of PDF files or saved exports.

Configuration > Export Setting

**If option is unavailable PowerSchool support can assist in deploying it on your site*

Export Settings

Settings only affect custom reports.

Data Format

Column Headers

Include column headers when exporting to a CSV file

Delimiter
Comma

Date Format
MM/DD/YYYY

Numeric Format
Number (1,234.56)

Data Set

Collapse data set to a single row per staff member using the most recent form information

Index File

Scheduled Exports







[New Scheduled Export](#)

Report	Actions
No Scheduled Reports Found	

Scheduled PDF/TIF Exports

[New Scheduled PDF/TIF Export](#)

[Current PDF/TIF Exports](#) History

Form Title	Export Type	Frequency	
Academy Director Summative Evaluation Form	PDF	Nightly	 
Admin. Intern/Dean Summative Evaluation Form	PDF	Nightly	 
Assistant Athletic Director Summative Evaluation	PDF	Nightly	 



Upcoming Talent PowerUp Meetings

- **Perform: Ask the Experts**
 - Tuesday, February 4, 2025
- **Professional Learning: Tracking Professional Learning Through External Credit Requests**
 - Wednesday, January 8, 2025
- **SmartFind Express: Understanding User Roles, Access, and Permissions**
 - Tuesday, January 14, 2025
- **Employee Records: Auditing Your Solution to Maximize Use**
 - *Tuesday, January 21, 2025
- **Applicant Tracking: The Blue Folder Explained: A Look Inside the Application Manager**
 - Wednesday, January 22, 2024

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