PowerSchool

Personalized Education for Every Journey

Welcome to the PowerSchool Perform PowerUp!

Personalized Education
for Every Journey

Effective Process Practice

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PowerSchool

Agenda

1. Talent at PSU Announcement!
2. Form & Workflows
3. Process Settings
4. Q&A


NEW!
Talent Recruitment & Retention
PSU Washington D.C.
PowerSchool University

PowerSchool University

Join us at PSU Washington D.C. and experience hands-on training now with PowerSchool Talent Recruitment and Retention!

Explore our comprehensive curriculum of topics and training sessions designed to empower attendees at this event. Plan ahead to make the most of your learning experience!

Featured Talent content at this PSU:

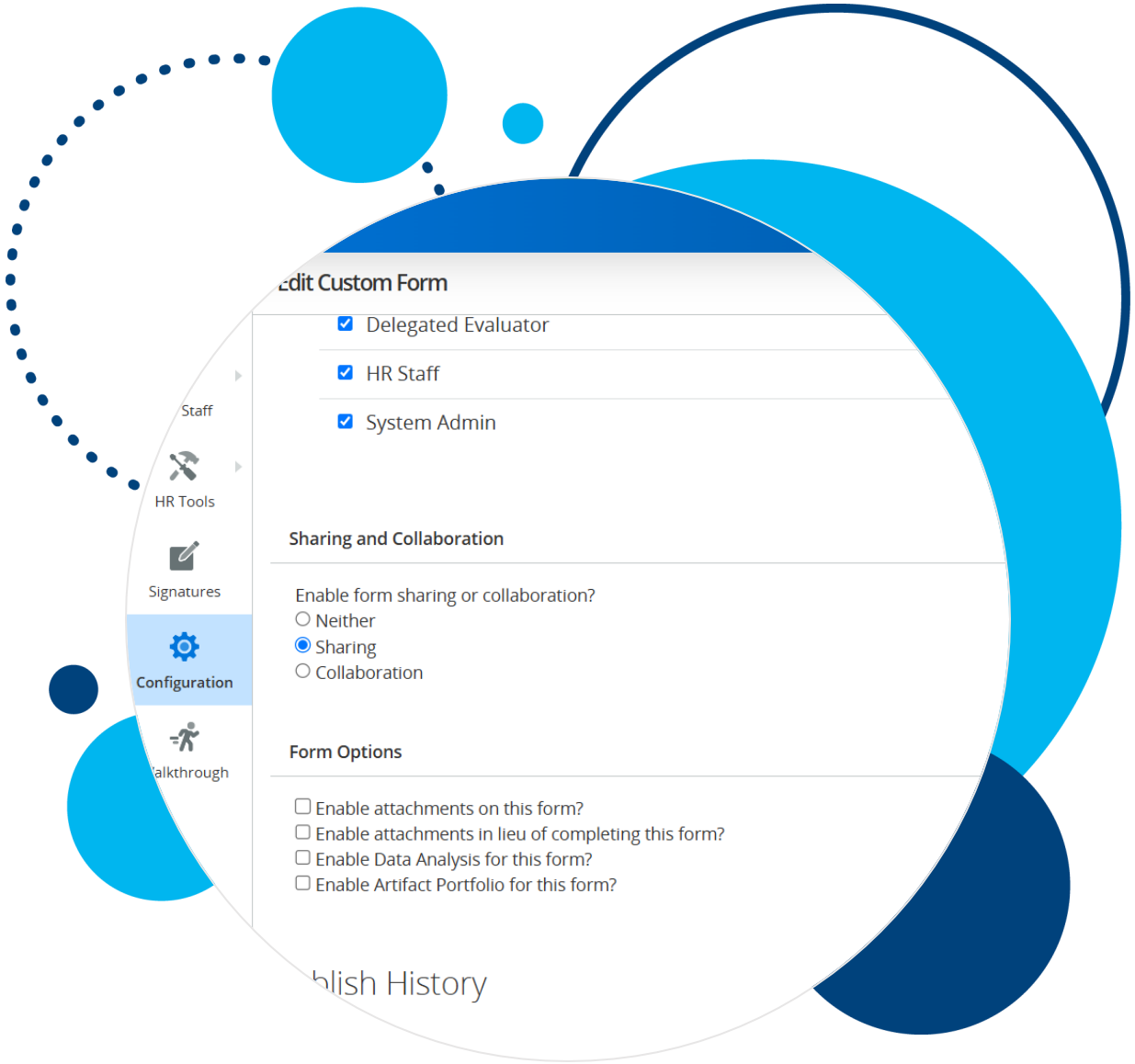
- Applicant Tracking
- Employee Records & Perform
- Coaching & Mentoring
- SmartFind Express
- Professional Learning + Schoology Integration
- Designing Professional Development for Adult Learners

Learn more at psu.powerschool.com

PSU 25 year ANNIVERSARY

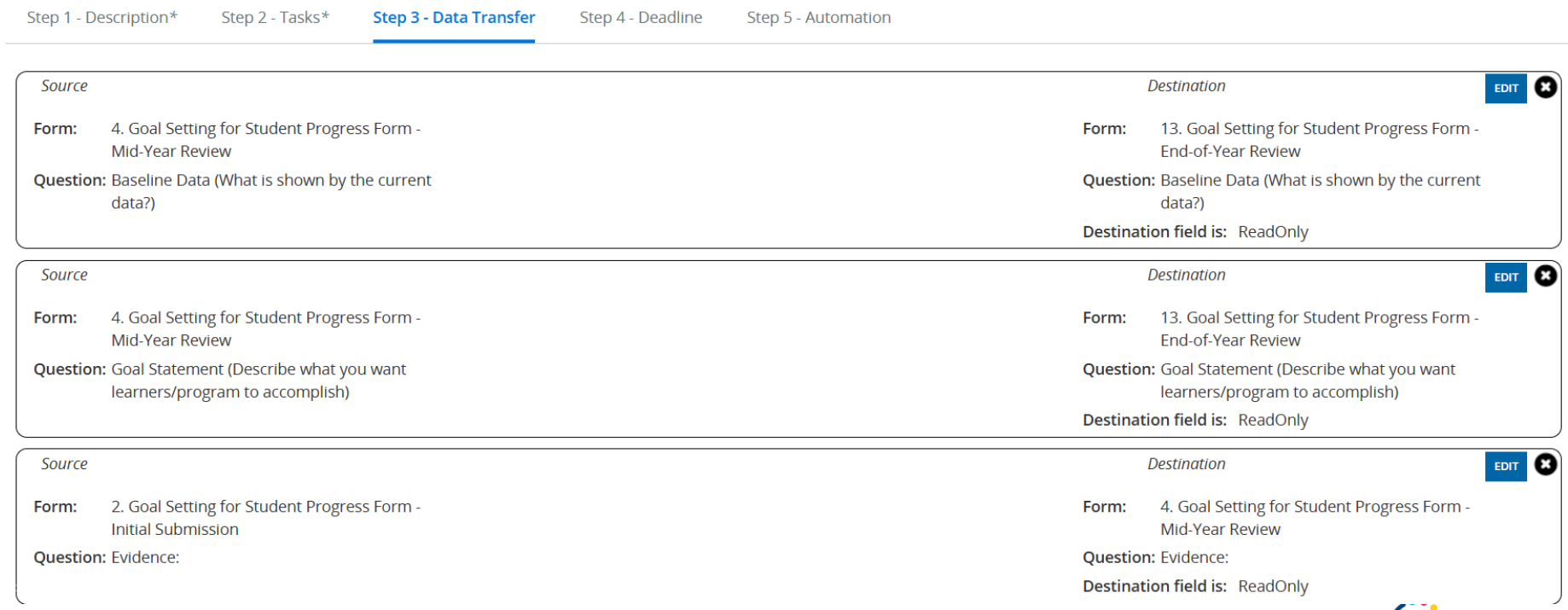
Forms & Workflows

- **Sharing and Collaboration:** determines who can access the form when
  - Sharing - supervisor can share the form with direct report (read only or editable)
  - Collaboration – supervisor and direct report can both access the form at any time

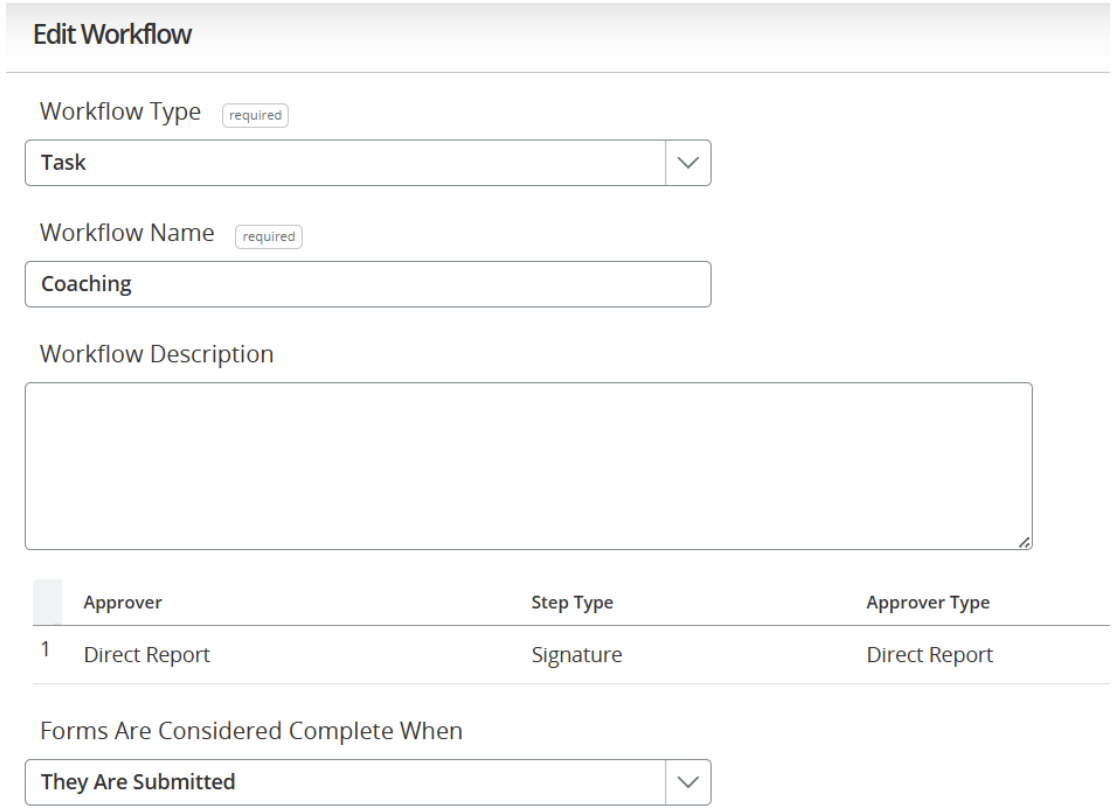


Forms & Workflows

- **Data Transfer:** transferring documentation from one form to another
  - Question types need to match
  - Preplanning is important
  - Read Only or Editable



Forms & Workflows



Workflows: collecting approval, signature, or notifying staff of completion or form information

- Approval – supervisor can review and then approve or deny with comment, document goes back to direct report when denied
- Signature – official electronic signature (disclaimer can be added)
- Review – sent to necessary stakeholders to review document information or completion
- Document completion – determines when the document begins filing security, feeds to analytics, and data transfer takes place

Forms & Workflows

Who needs to access the forms and at what times?

Which tasks may go back and forth several times for editing?

Which tasks do you need an official signature on?

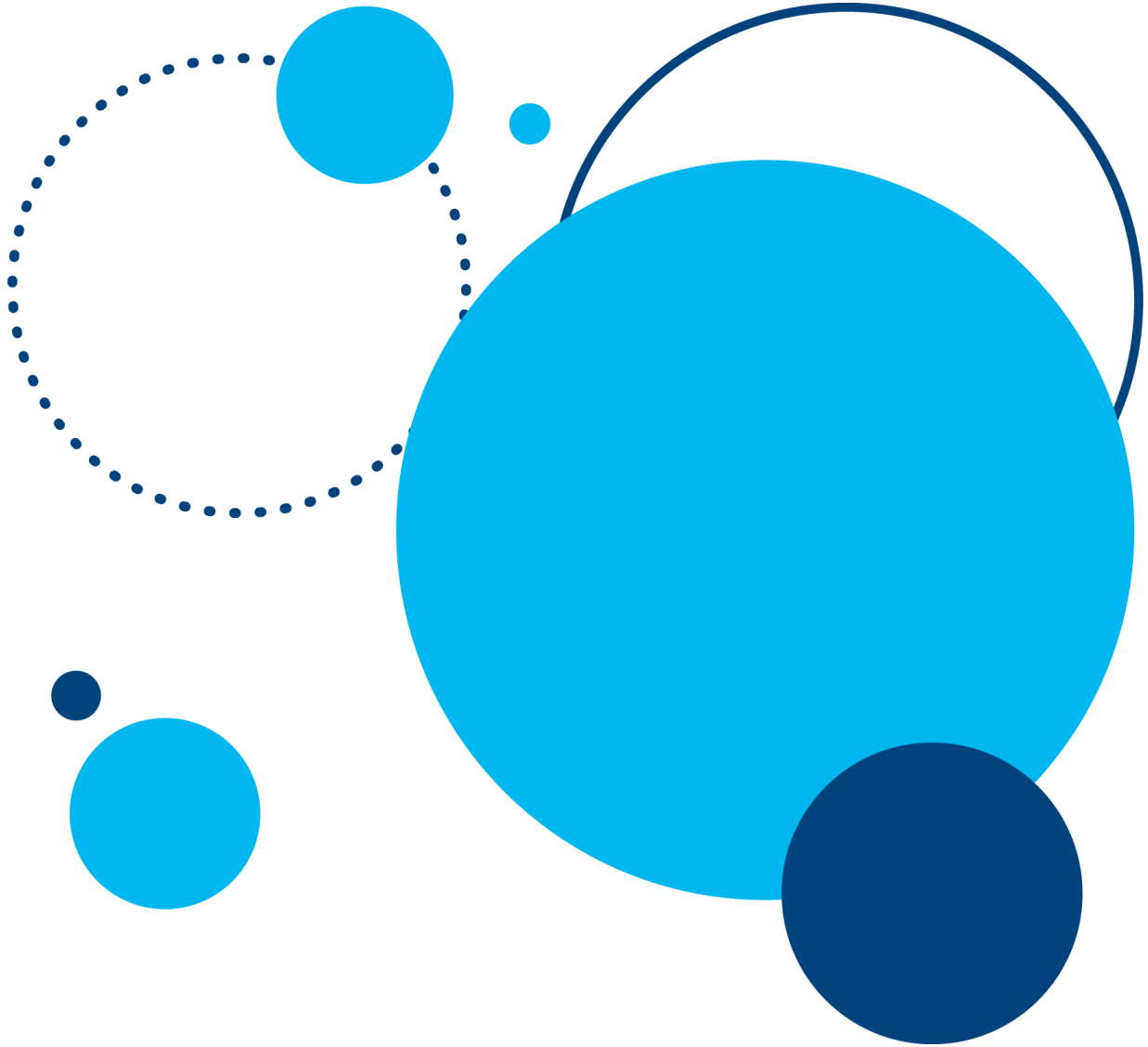
Are we requiring unnecessary steps or the same information to be filled out several times?

Forms & Workflows

- **Goal Setting Forms:** ongoing documentation
  - One form for the year or multiple forms with data transfer
  - Collaboration – with question areas defined for supervisor and direct report
  - Approval can be used for edit purposes

Forms & Workflow

- **Pre-observation Meeting**
  - Collaboration or Neither
  - If no form can be documented through a meeting task type
- **Observation**
  - Responsibility of Supervisor
  - Workflow to document appropriate signatures
- **Post-observation Meeting**
  - Collect reflection and data
  - Document coaching conversation



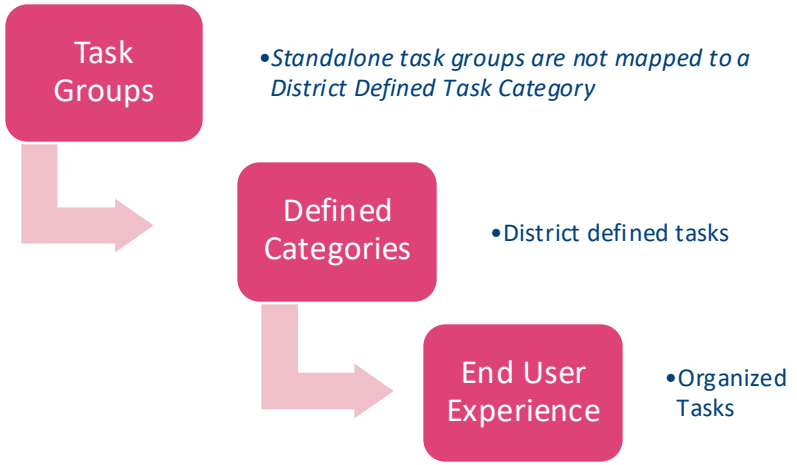
Forms & Workflows

- **Summative**
  - Data can be transferred
  - Responsibility of the supervisor
- **Scoring Form**
  - Can be hidden from direct report upon filing
  - Calculation and data transfer can be utilized for state reporting

How do your form and workflow settings work with your processes?

Process Settings

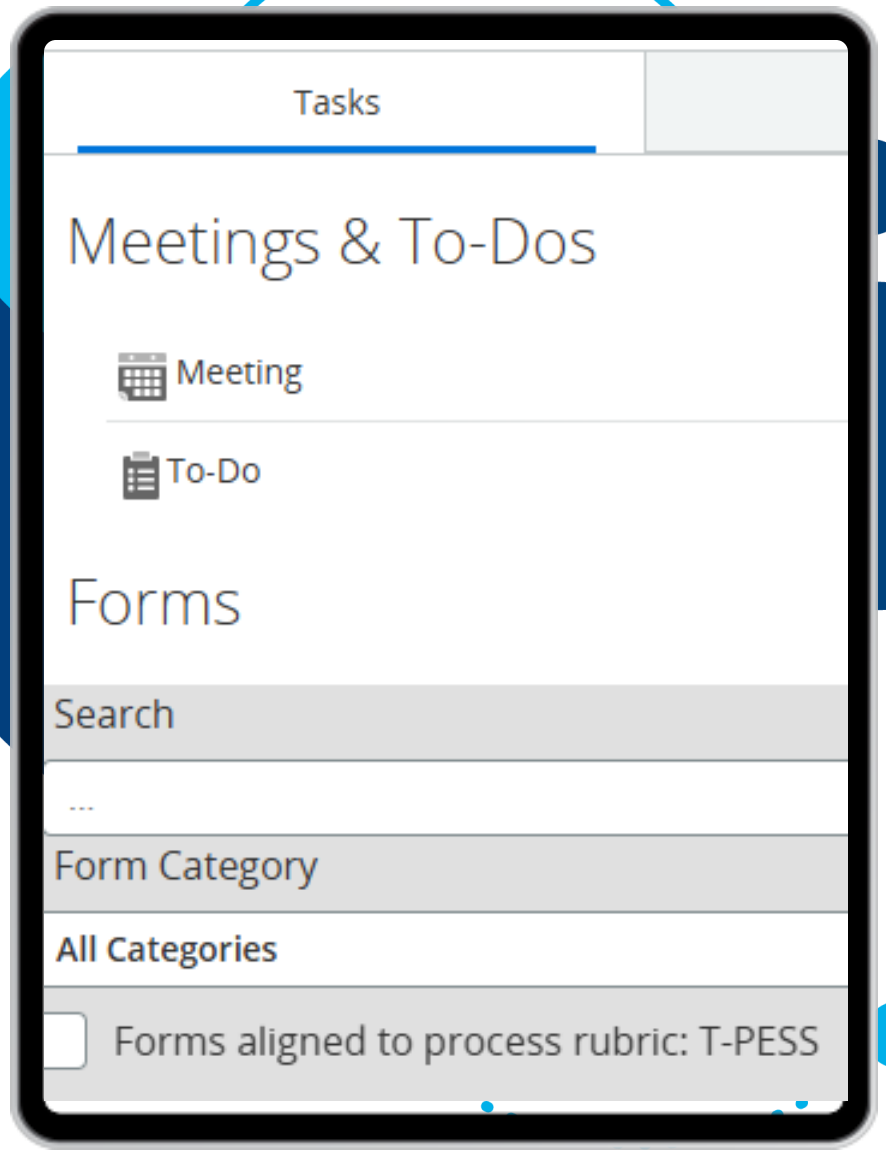
1. Start with identifying your **job profiles**
2. Decide what will be the **tasks** for the job profiles
3. Identify the **supervisor's role and responsibilities**
4. Create **workflows** and structures for your district
5. Formulate a decisive **timeline** aligned with instructional expectations
6. Product a **defined list of tasks** for performance improvement plans
7. Review, assess and synthesize desire **outcomes** throughout the year of the processes



Process Settings

Task Types: all can be monitored on the **Task Dashboard**

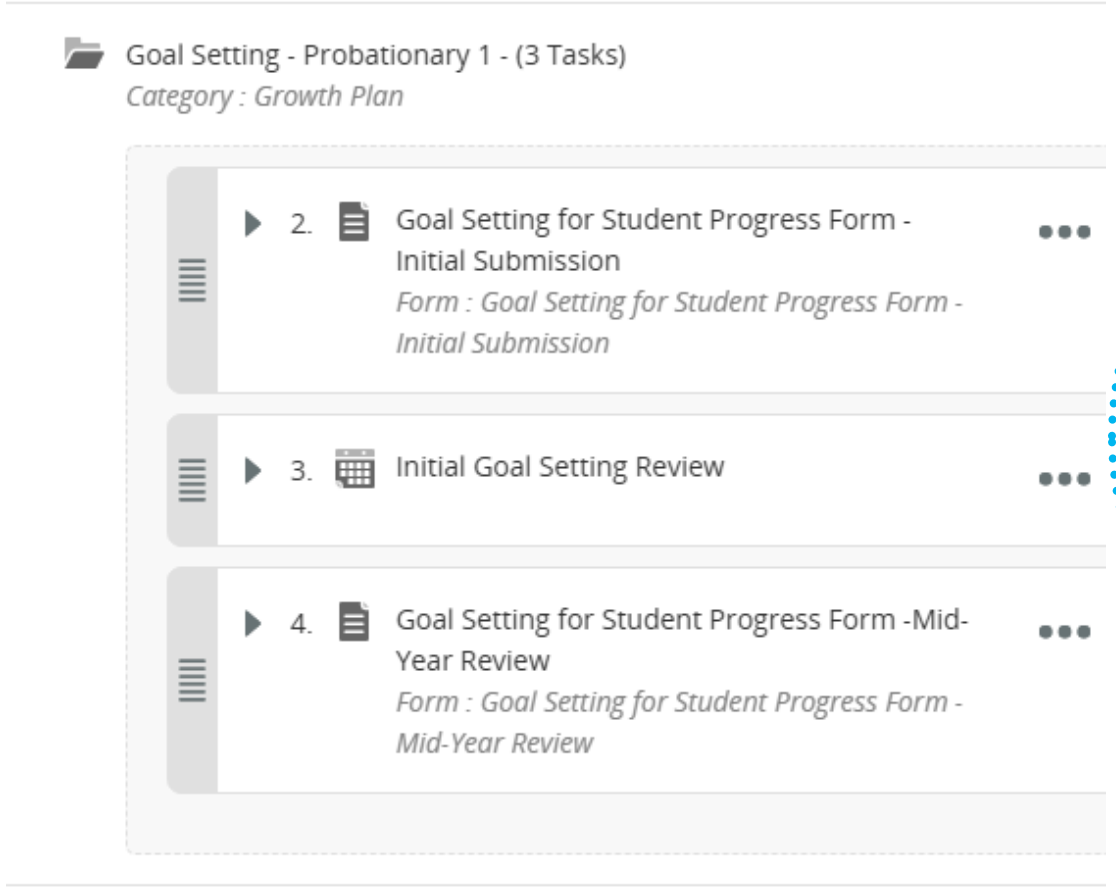
- Form – allows you to document and provide feedback to direct report
- Meeting – supervisors can schedule and track meetings (integrates with calendars)
- To-do – important tasks that may not have a form or meeting can be completion tracked



Process Settings

Task Grouping:

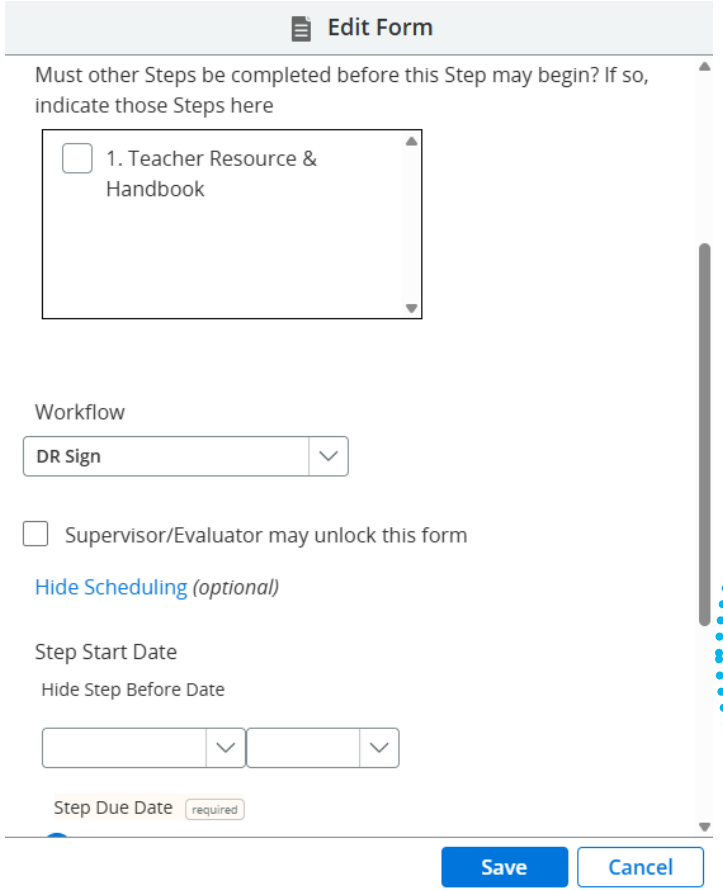
- Consider grouping tasks for monitoring of completion and ease of use
- Group task based off group steps and type:
  - Goal Setting: form, meeting, reflection
  - Observation: Pre-observation form & meeting, observation form & meeting, post-observation form & meeting
  - Summative: Summative observation form & meeting



Process Settings

Prerequisites and Hiding Tasks

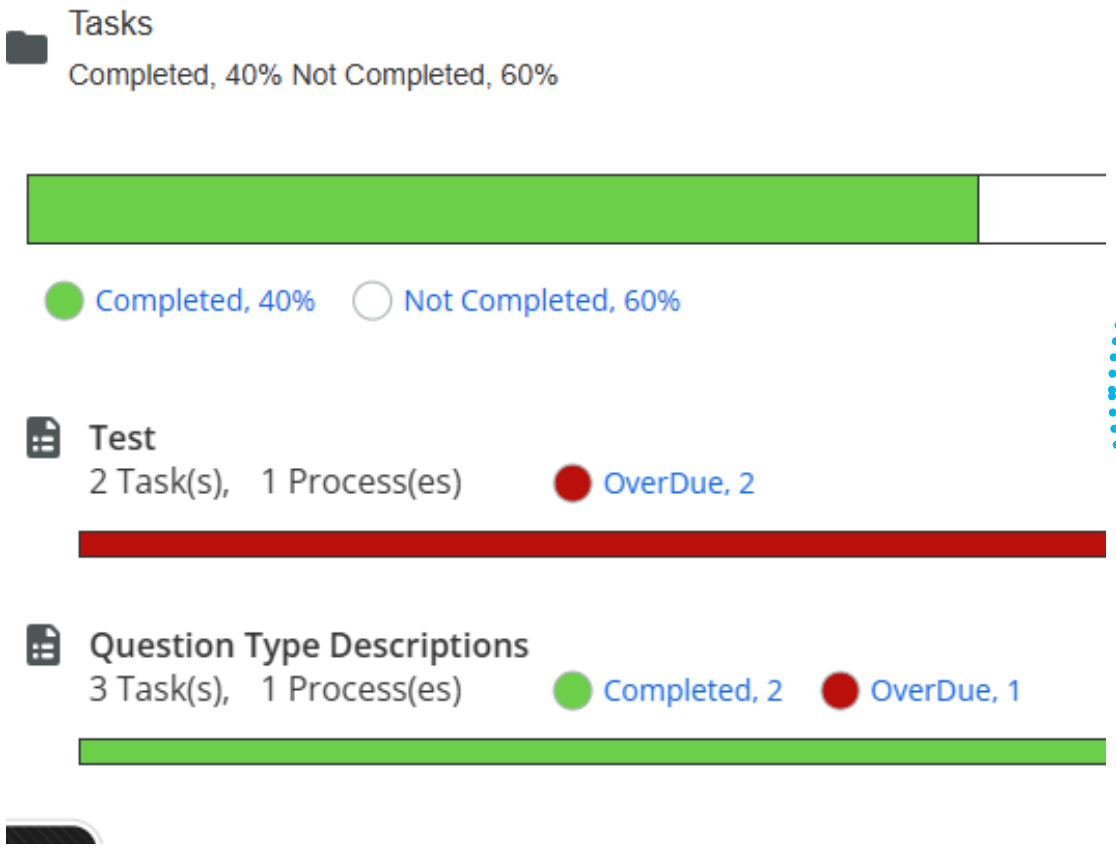
- Ensures all steps requirements are complied with
- Can keep from overwhelming supervisors
- Allows district control of timeline
- Keeps the focus on tasks appropriate for the time of year



Process Settings

Deadlines and Due Dates

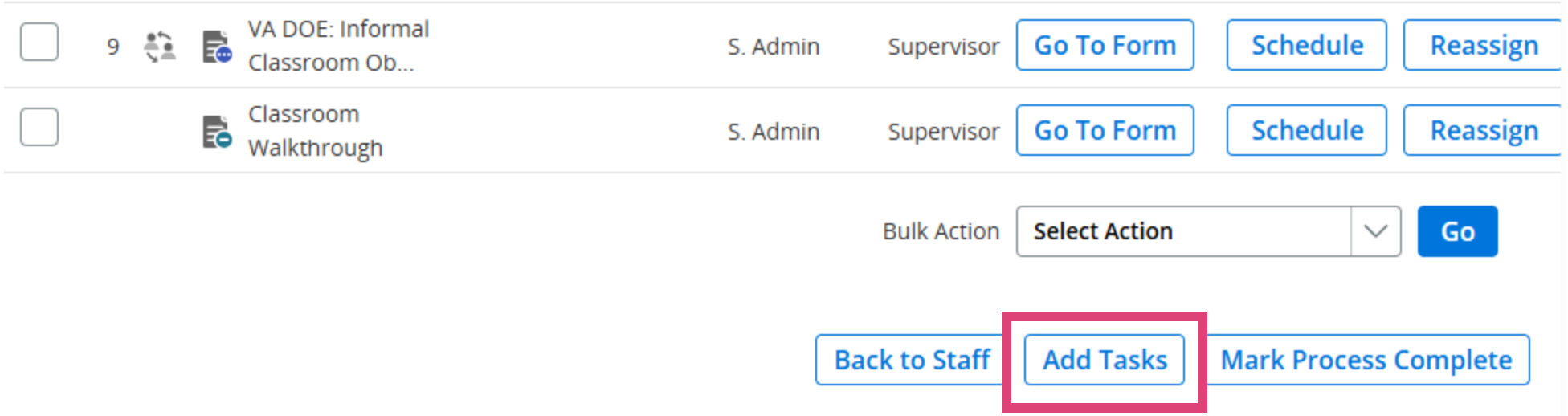
- Deadlines are for the full process
- Due dates apply to tasks
- Tasks that do not have a due date set default to the process



Process Settings

Adding tasks to already assigned processes

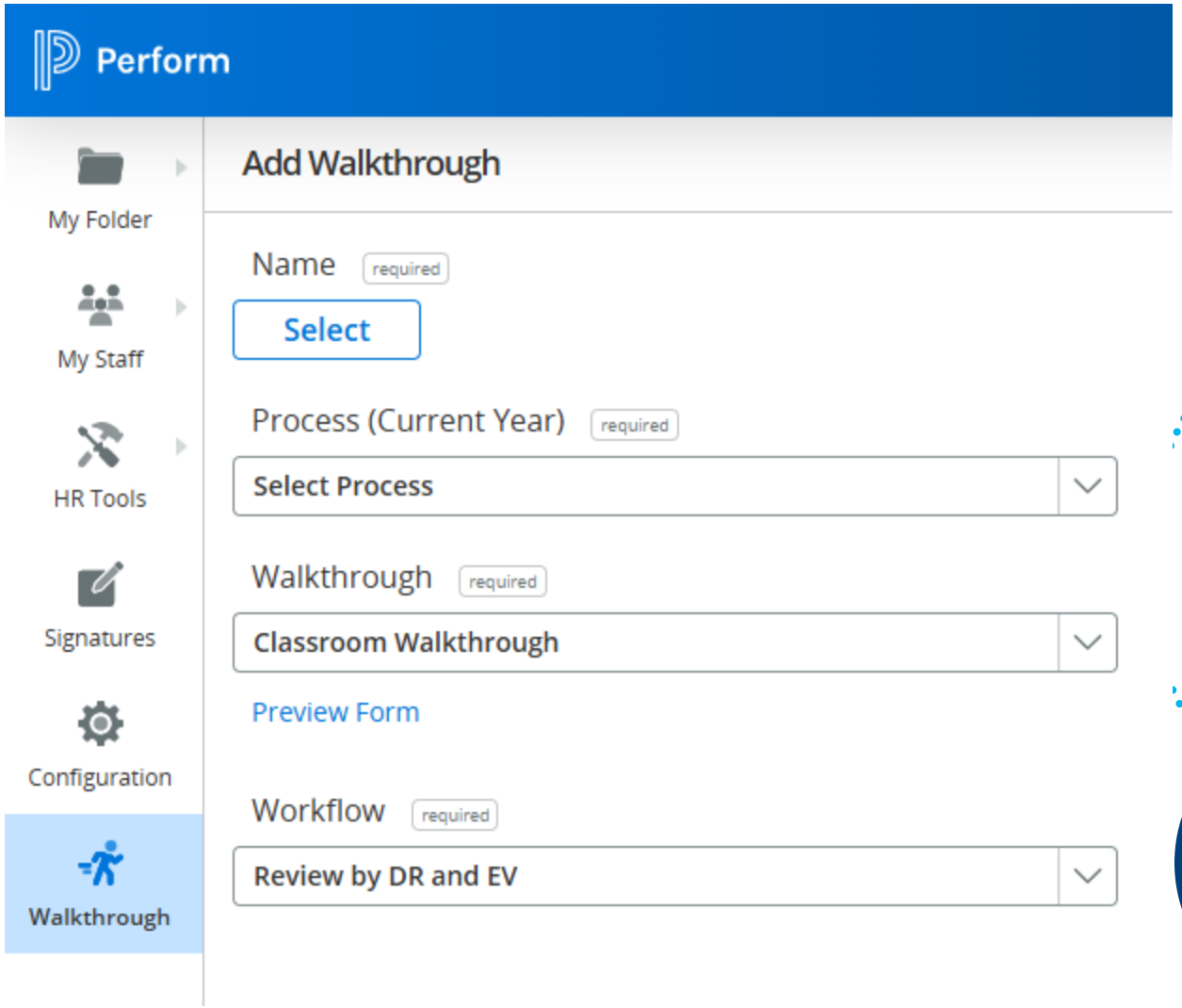
Bring it in from a process and remove unnecessary tasks or build as an ad-hoc process



Process Settings

Adding tasks to already assigned processes

Duplicate the form and place it in the walkthrough area and utilize ad-hoc walkthrough



What small modifications can you make to your process and tasks to increase efficiency?

Upcoming Perform Topic

6/3 - **Perform:** Scheduling Meetings and Tasks

All sessions will start at: 9 PT/12 ET

Additional Upcoming Talent PowerUp Topics

- 5/7 - **Professional Learning:** Professional Learning Surveys
- 5/13 - **SmartFind Express:** Best Practices for Adding, Removing, and Changing Locations
- 5/20 - **Employee Records:** Managing Exiting Employees
- 5/21 - **Applicant Tracking:** Candidate Portal Design & Leveraging New Functionality

PERFORM SUPERVISOR POWERUP

6/11 - Scheduling Meetings and Tasks for Supervisors

Session will start at:
10 PT/1 ET

Webinar registration link, please share with any supervisors you would like to invite: Webinar Registration - Zoom