

# Welcome to the PowerSchool Professional Learning PowerUp!

# Personalized Education for Every Journey

## Tracking Professional Development through External Credit Requests

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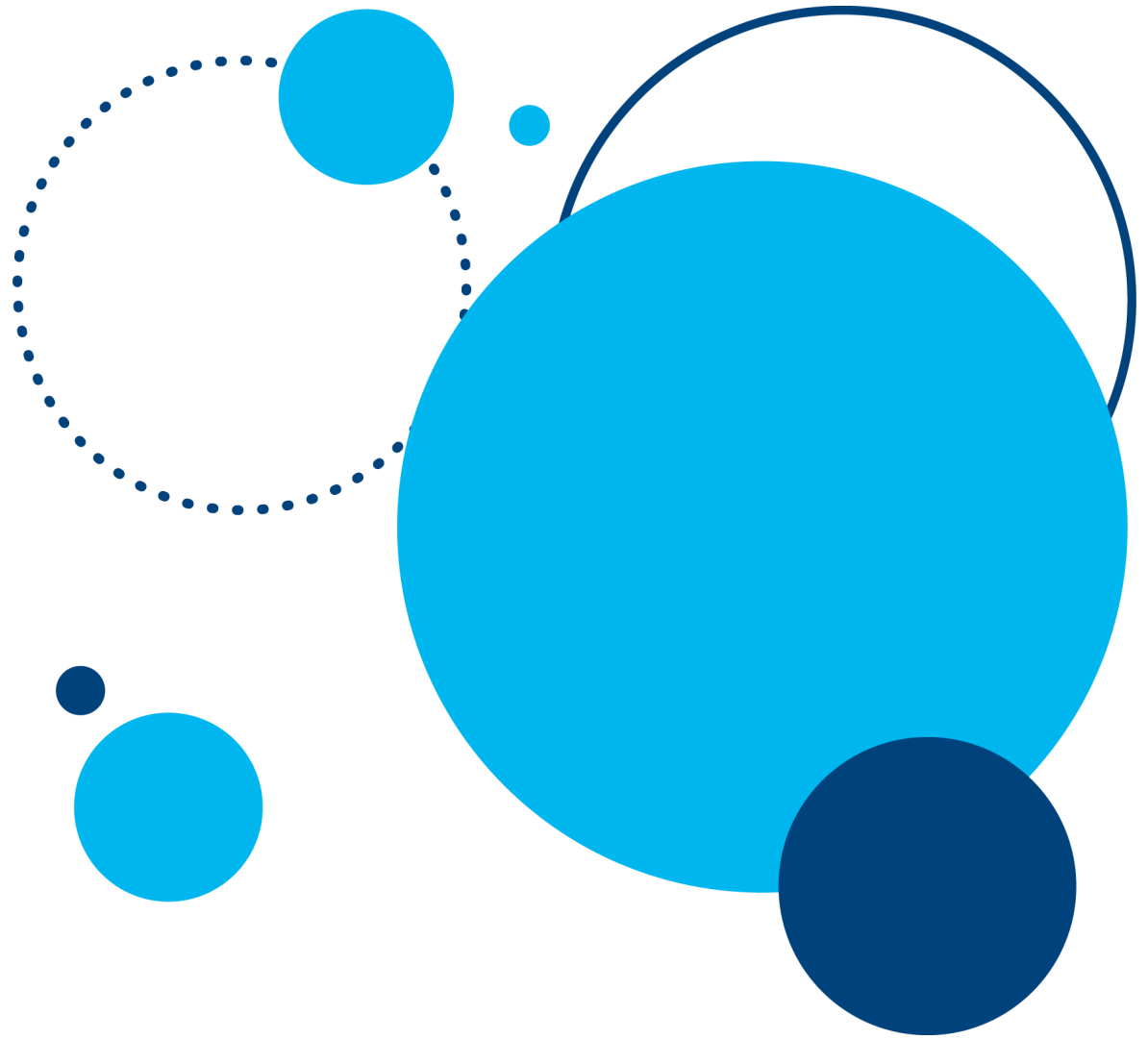


# Agenda

- 1 Understanding Transfer Credit
- 2 Walkthrough of Transfer Credit
- 3 Configuring the forms
- 4 Understanding Transfer credit Request Dashboards

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# External Credit Requests



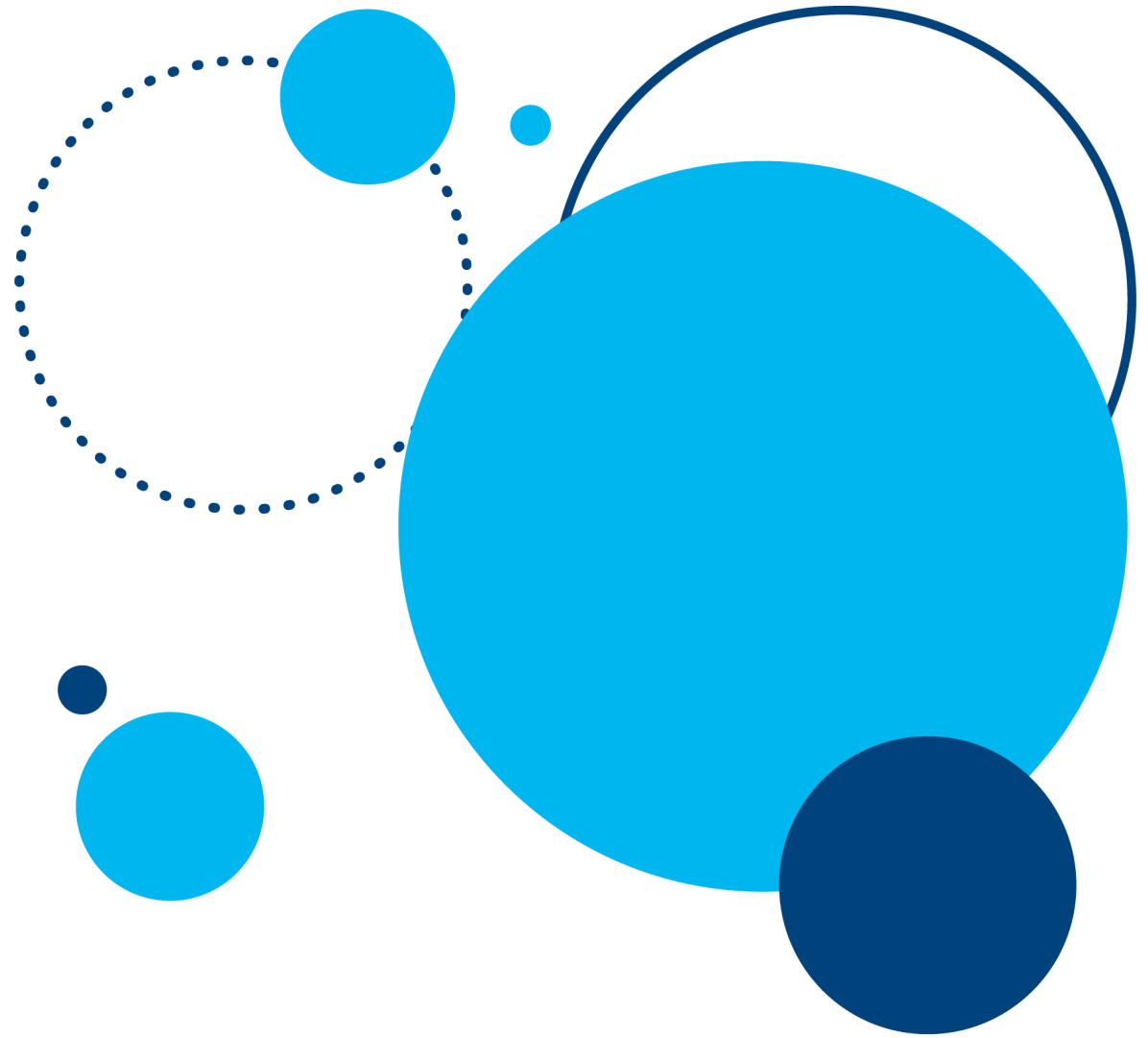
# External Credit Requests

Transfer Credit helps in maintaining an accurate and comprehensive record of the professional development undertaken by staff, enabling school districts to manage certifications, training, and PD requirements more effectively.

The Transfer Credit request can help when staff has completed coursework or earned credits at one educational institution and those credits are recognized and applied toward their current academic program at a different institution.

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# Transfer Credit Workflows



# Transfer Credit Workflows

## Steps

- **Workflows** involve the steps administrators take to transfer external credits (from other institutions or programs) into a staff member's professional development record. This ensures that credits from external courses, workshops, or certifications are properly recognized and tracked.
- There are four different workflow options available for managing this process, each designed to ensure accurate credit transfer and compliance with professional development requirements.

# Workflows

## Auto Approval

Requester

Transcript

## No Pre- Approval, 1 Credit Approval

Requester

Credit Approver

Transcript

## 1 Pre- Approval, 1 Credit Approval

Requester

Pre- Approver

Requester

Credit Approver

Transcript

## 2 Pre- Approval, 1 Credit Approval

Requester

Pre- Approver1

Pre-Approver2

Requester

Credit Approver

Transcript



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# Approval Process Configuration



# Approval Process Configuration

## Forms

Employee ID

Department Required

English (Key: (N/A))

Professional Learning Activity Title Required

Location Required

Start Date Required  
12/17/2024

End Date Required  
12/17/2024

Course Description Required

**B** *I* U **A** **A** Size

## Approvers

Approvers

Method for Selecting Pre-Approver 1

Automatically select based on Requester's site  
*Approvers will be determined by a relationship to the Requester by site (e.g. the principal at the Requester's site) Please note that System Super Users and PD Super Users will be added to all sites as an approver.*

Select Specific Pre-Approvers  
 Credit Requester selects Pre-Approvers who receive the request  
*This option presents the Credit Requester with the list of all Pre-Approvers and requires them to choose who will receive the request.*

Selected Pre-Approvers

Edit Dynamic Rules

Select a Column

Update + Add Filter

Site	Approver(s)
Online School	View 3 Approvers
Test 404	View 7 Approvers
Test School 2	View 7 Approvers

# Forms

- To edit the forms for Credit Approval select Configuration> Transfer Credit Manager> Approval Process Configuration.
- You can edit an existing Process form or create a new Process.
- You can add fields by selecting "Add Field" option and remove fields by selecting the trash can icon. You can reorder the fields if needed.

The screenshot shows the 'Edit College/University Credit' configuration page. The left sidebar contains a navigation menu with the following items: Process Details (checked), Request Credit: Form (checked), Credit Approval: Approvers (checked), and Credit Approval: Form (selected). The main content area is titled 'Form' and contains a text box with the instruction: 'Credit Approval forms are filled out by the Approver once the request has been pre-approved and the Credit Requester submits the Credit Request form.' Below this is a 'Show Inactive Fields' checkbox. A table titled 'Credit Areas' is displayed with columns for 'Credit Area', 'Credits', and 'Hours'. The table has one row for 'Professional Development Units' with empty input fields for 'Credits' and 'Hours'. To the right of the table is a 'Key: (N/A)' field with edit, lock, and toggle icons. At the bottom of the page are 'Previous' and 'Finish' buttons.

The screenshot shows the 'Edit In-Town Field Trip Request' configuration page. The left sidebar contains a navigation menu with the following items: Process Details (checked), Request Pre-Approval: Form (selected), Pre-Approval: Approvers (unchecked), Pre-Approval: Form (unchecked), Request Credit: Form (unchecked), Credit Approval: Approvers (unchecked), and Credit Approval: Form (unchecked). The main content area is titled 'Form' and contains a date field with the value '12/18/2024' and a 'Can Edit : Pre-Approver-1' label. Below this is a 'Description' field with a rich text editor toolbar and a 'Key: (N/A)' field with edit, lock, and toggle icons. At the bottom of the page are 'Add Field' and 'Reorder Fields' buttons, which are highlighted with a red box.

# Forms

- Pre-Approval request form and approval forms can be edited by either pre approver or Approver based on permissions given to edit on the field level. Select the pencil icon to edit the field permissions. For eg Approver or Pre Approver.

The screenshot shows the 'Edit In-Town Field Trip Request' form editor. The 'Description' field is highlighted with a red box, showing a pencil icon, a lock icon, and a toggle switch. The form includes a date field (12/18/2024), a 'Can Edit' dropdown (Pre-Approver-1), and a 'Description' field with a rich text editor. The 'Can Edit' dropdown is set to 'CreditApprover Pre-Approver-1'. There are 'Add Field' and 'Reorder Fields' buttons at the bottom.

The screenshot shows the 'Edit In-Town Field Trip Request' form editor, specifically the 'Approvers' section. The 'Approvers' section is highlighted with a red box, showing the 'Allow Pre-Approver-1 to edit' checkbox checked. The form includes a 'Field Label' (Approvers), a 'Key' field, and an 'Instructions/Supporting Text' field. The 'Allow Pre-Approver-1 to edit' checkbox is checked, and the 'Allow Approver to edit' checkbox is unchecked. There are 'Add Field' and 'Reorder Fields' buttons at the bottom.




# Forms

- Please note some fields are mandatory and cannot be updated. They will have the lock icon near it.

Form

Credit Areas Required

	Credit Area	Credits	Hours
<input type="checkbox"/>	Professional Development Units	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Hours	<input type="text"/>	<input type="text"/>

Key: (N/A)   

Can Edit : CreditApprover

# Approvers

- Administrators or designated approvers review and approve external credits earned by staff members (such as external workshops, courses, or certifications).
- You can add Approver and assign approvers to the workflows.

PowerSchool | Customer Education

Home Professional Learning Badges Courses Transcript Salary Scale Advancement External Credit Request My Growth Plan Certification And Licensure Reporting PD Playlists Mentoring

Transfer Credit Approval Process Edit College/University Credit

Process Details  
Request Credit: Form  
Credit Approval: Approvers  
Credit Approval: Form

### Approvers

**Method for Selecting Credit Approver**

Automatically select based on Requester's site  
*Approvers will be determined by a relationship to the Requester by site (e.g. the principal at the Requesters site) Please note that System Super Users and PD Super Users will be added to all sites as an approver.*

**Select Specific Credit-Approvers**  
 Credit Requester selects Credit-Approvers who receive the request  
*This option presents the Credit Requester with the list of all Credit-Approvers and requires them to choose who will receive the request.*

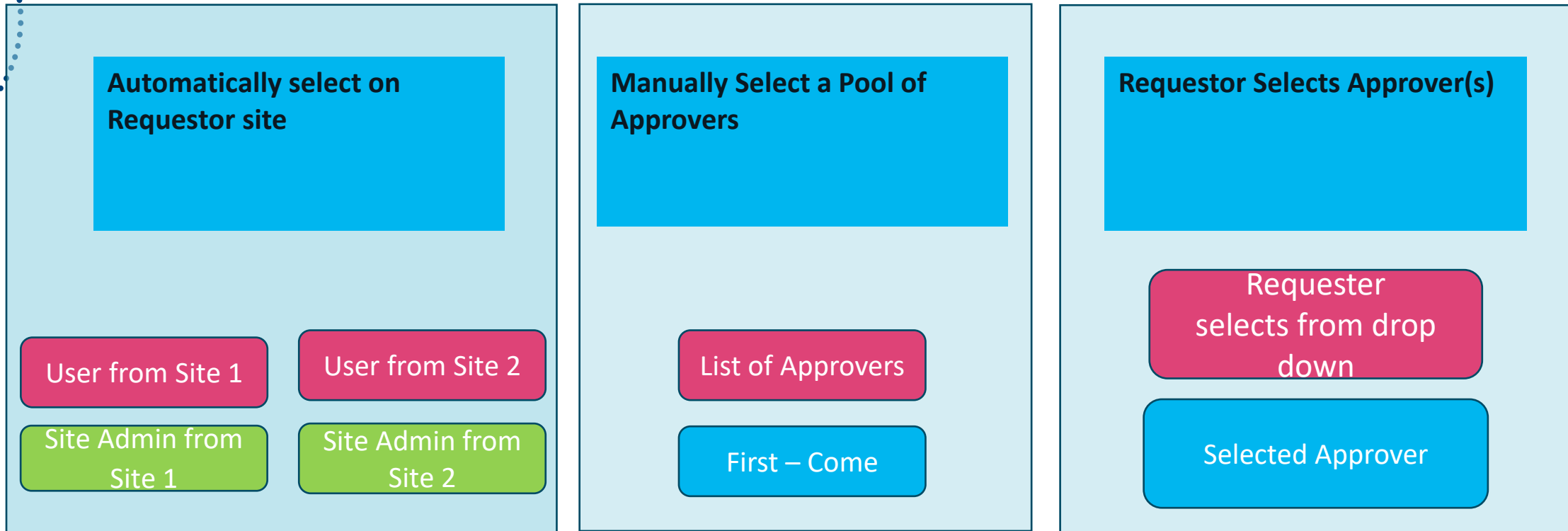
**Selected Credit-Approvers**

Add Credit-Approvers

No approvers have been setup for this approval process.

Previous Next

# Options in Approval Assignments



Approvers can be added and assigned to workflows based on the above options.

**My Transfer Credit Requests**

Dashboard | Catalog | My Professional Learning

Pending Submission | Submitted | Completed | Archived

New Credit Request

College/University Credit  
 Conference Attendance  
 In-Town Field Trip Request  
 zz-Do Not Use

noreply@pl.powerschool.com  
 To: Marissa Gonzalez

EXTERNAL

Dear Bruce Banner,

You have received a credit request from Peter Parker for Winter Learning Conference.

To review this request, click: <https://beta1.pl.powerschool.com/ia/empari/credit/transfer/coursetransfercredit/v2/editCreditRequest/128>  
 Sender: marissa.gonzalez@powerschool.com

Reply | Forward

**Transfer Credit Approvals**

In Progress | Submitted | Archived

Pending Pre-Approval | Pending Credit Approval

Select a Column

Update | Add Filter

Status	Title	Type	Hours	Credit Areas	Requested	Requested By	Date Updated	Updated By
	Winter Learning Conference	Out of District	N/A		12/18/2024	Parker, Peter	12/18/2024	Parker, Peter

1-1 of 1 Results



Manage Requests Credit Request  
Out of District

- Request Pre-Approval
- Pre-Approval
- Request Credit
- Credit Approval

**Approve Pre-Approval Request**

Approve Out of District for Parker, Peter

**Note**

**Pre-Credit Approval**

**Hours** Required

6

**Proof of attendance \***

[Attach File](#) ?

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Transcripts\_Scan\_5\_15\_2023 1\_43\_44 PM (1).PDF  
12/19/2024 12:26 PM by Parker, Peter

**Select Approver(s) for Credit Approver** Required

**Banner, Bruce**

**Credit Approval** Not Submitted

**Credit Areas** Required

	Credit Area	Credits	Hours	Bankable
<input checked="" type="checkbox"/>	Professional Development Units	<input style="width: 50px;" type="text" value="6"/>	<input style="width: 50px;" type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Hours	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input type="checkbox"/>

My Transcript										
Course #	Course Title	Section Number	Section Title	Start Date	End Date	Credit Area	Credit Type	Certificate Num	Completion Date	Survey
	Winter Learning Confernce			01/11/2025	01/12/2025	Professional Development Units	6.0 Credits		01/12/2025	
10596	Classroom Management: Student Redirect	10580	Student Redirect	10/29/2024	10/29/2024	Professional Development Units	0.25 Credits	89668677	10/29/2024	No surveys to take.
10058	Digital Citizenship for Teachers	10061	Digital Literacy	06/29/2021	06/30/2026	Hours	3.0 Hours	54767658	09/25/2024	<a href="#">Take Survey</a>
10406	Using Literature in Math	10387	Using Literature in Math	05/24/2024	05/29/2028	Professional Development Units	3.0 Hours	45566854	10/09/2023	<a href="#">Take Survey</a>



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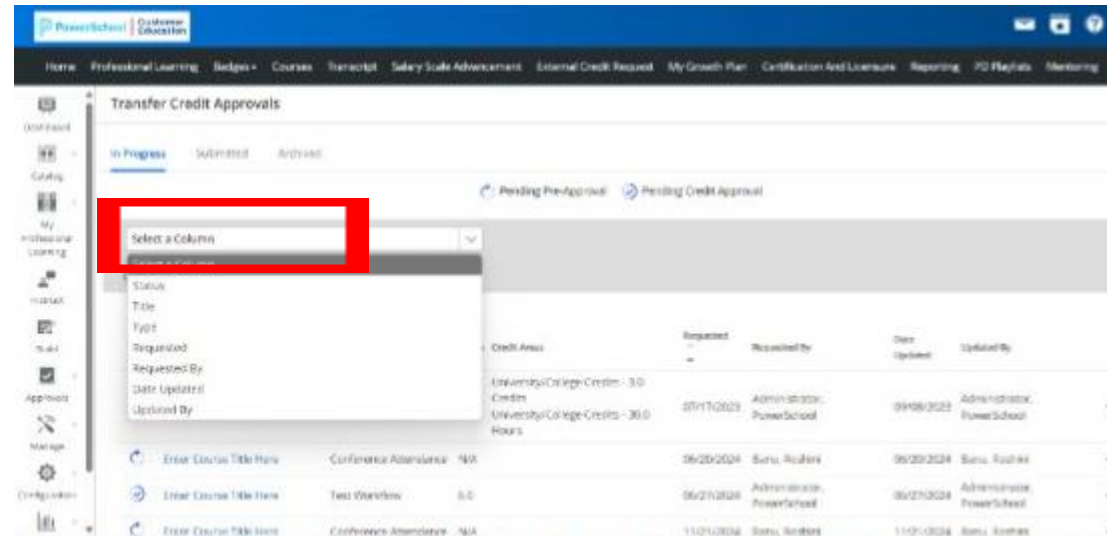
# Approval Request Administration Dashboard and Manage Credit Requests



# Approval Request Administration Dashboard

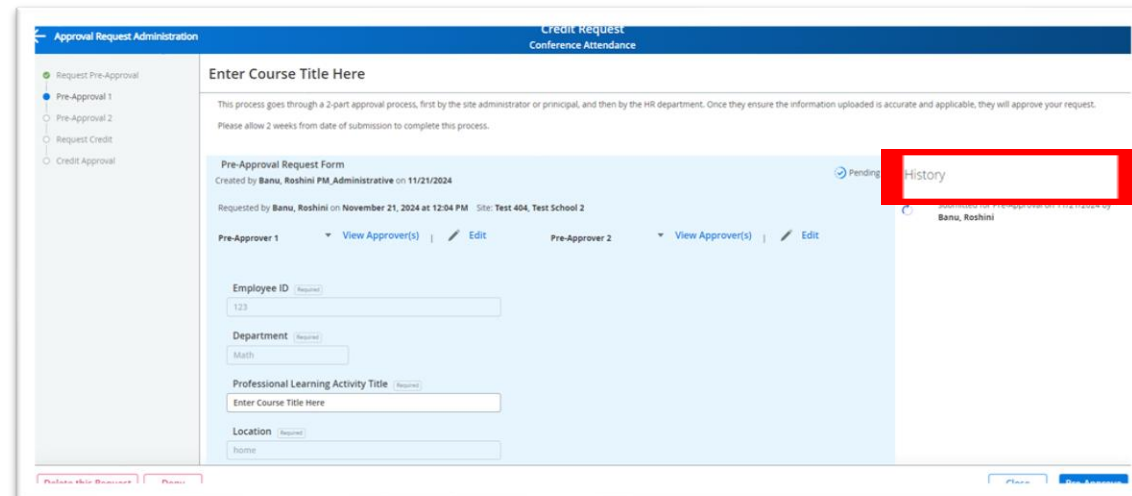
On the Transfer Credit Approvals dashboard you can filter using different criteria like Title, Requester, Credit approver etc.

- You can view a Request and you can approve a request and add comments.
- History will show you the date the request was submitted.
- The status of the request will also be shown at the top of the request form.
- The request can be deleted and denied based on permissions provided.



The screenshot shows the 'Transfer Credit Approvals' dashboard. A dropdown menu is open, showing options to 'Select a Column' and a list of columns: Status, Title, Type, Requested, Requested By, Date Updated, and Updated By. The table below has columns for Request, Requested By, Date Updated, and Updated By. The data rows are:

Request	Requested By	Date Updated	Updated By
University/College-Credits - 3.0 Credits	Administrative, PowerSchool	09/08/2023	Administrative, PowerSchool
University/College-Credits - 36.0 Hours	Administrative, PowerSchool	09/29/2024	Banu, Roshini
Enter Course Title Here	Conference Attendance - N/A	09/29/2024	Banu, Roshini
Enter Course Title Here	Test Worksheet - 0.0	09/27/2024	Administrative, PowerSchool
Enter Course Title Here	Conference Attendance - N/A	11/21/2024	Banu, Roshini

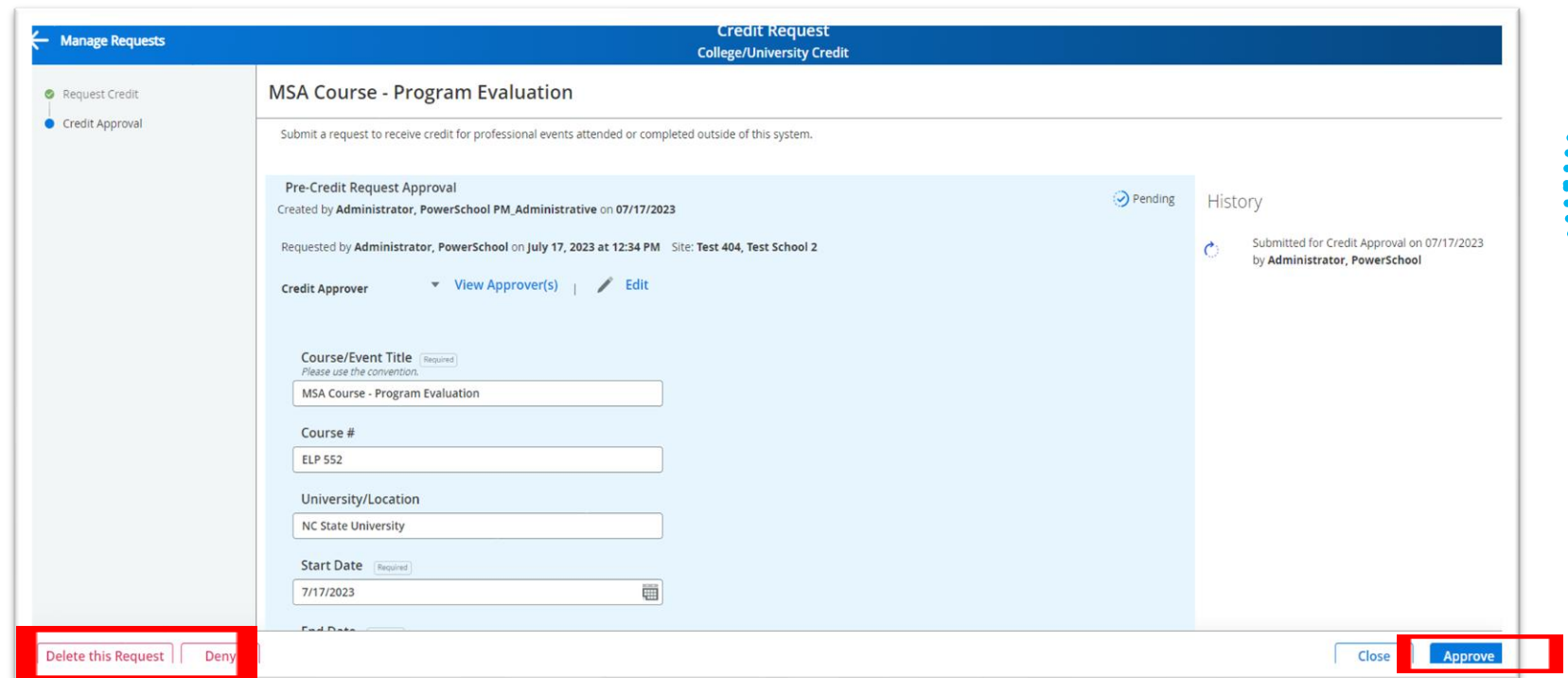
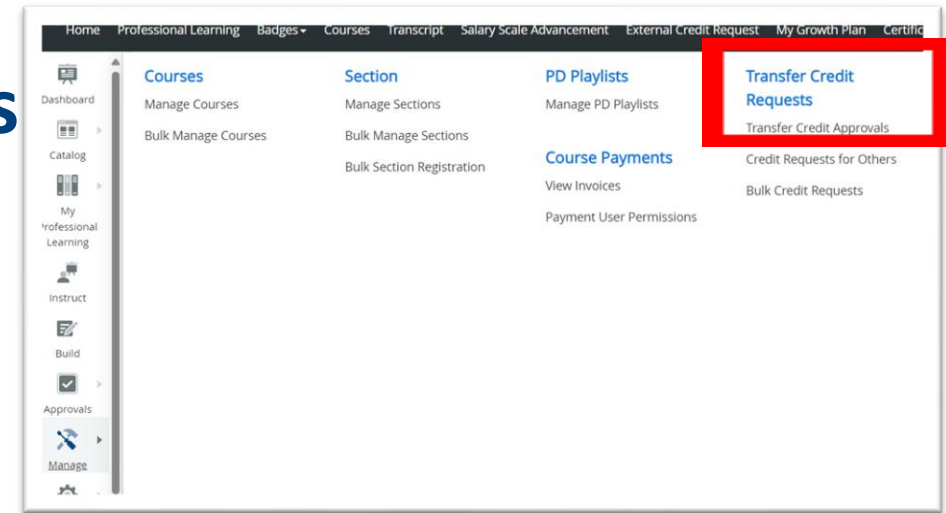


The screenshot shows the 'Approval Request Administration' form. The form is titled 'Enter Course Title Here' and includes a 'Pre-Approval Request Form' section. The form is created by 'Banu, Roshini PM, Administrative' on 11/21/2024. The form is requested by 'Banu, Roshini' on November 21, 2024 at 12:04 PM. The form is for 'Test 404, Test School 2'. The form includes fields for 'Employee ID', 'Department', 'Professional Learning Activity Title', and 'Location'. The 'Employee ID' field contains '123', the 'Department' field contains 'Math', and the 'Location' field contains 'Home'. The 'Professional Learning Activity Title' field contains 'Enter Course Title Here'. A 'History' tab is visible on the right side of the form.

# Manage Transfer Credit Requests

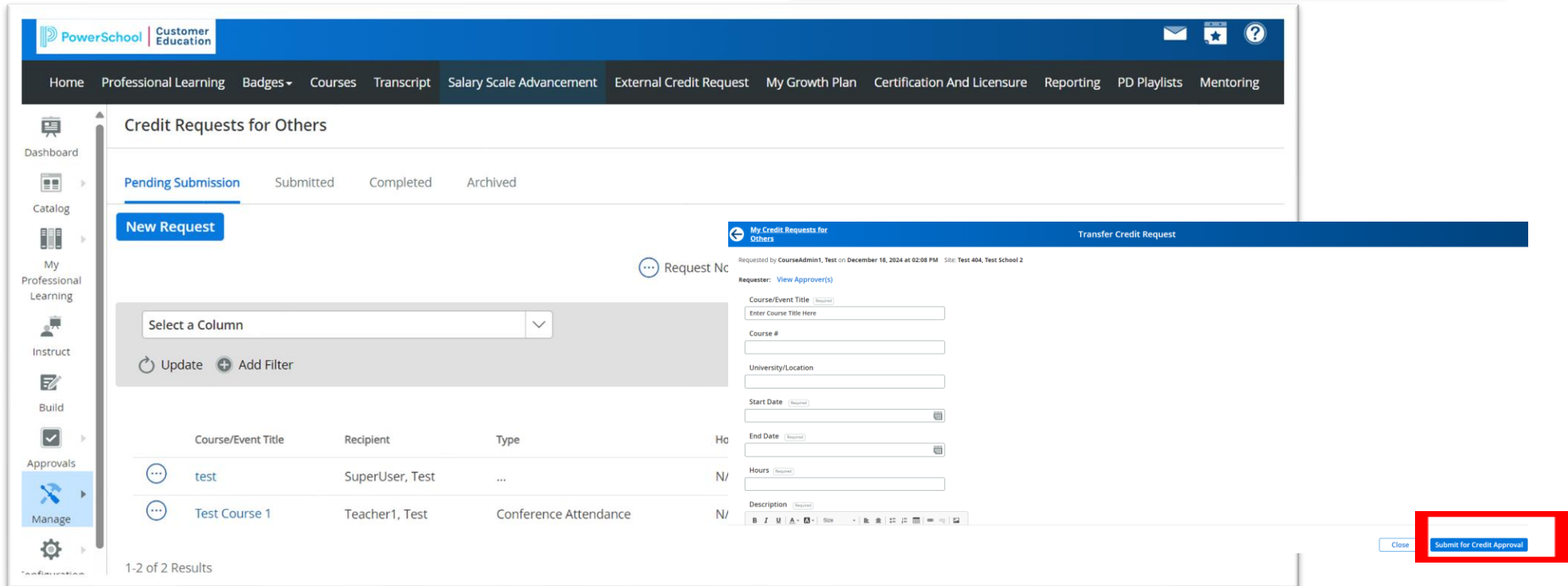
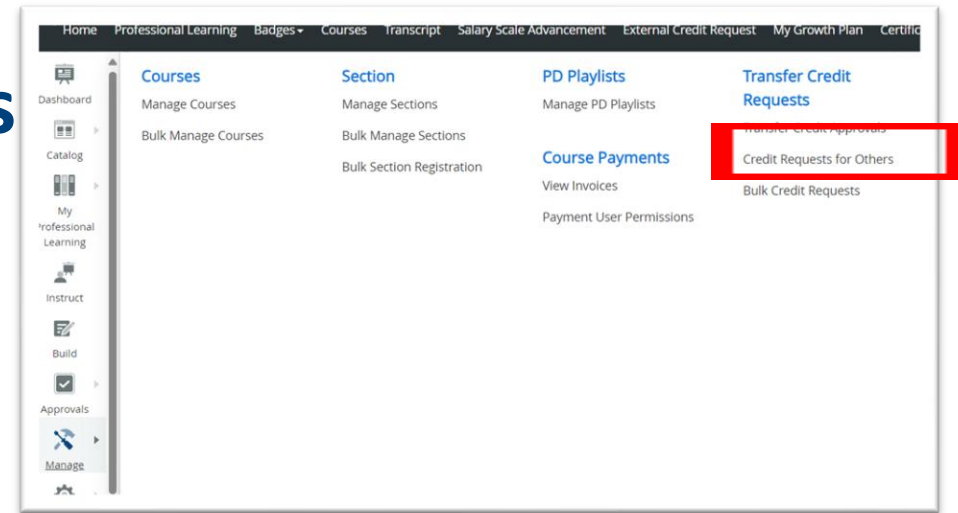
On the Manage tab you can select Transfer Credit Approvals to review the Credit requests in Progress, submitted and archived.

- You can select a specific request and then either Approve or deny request.



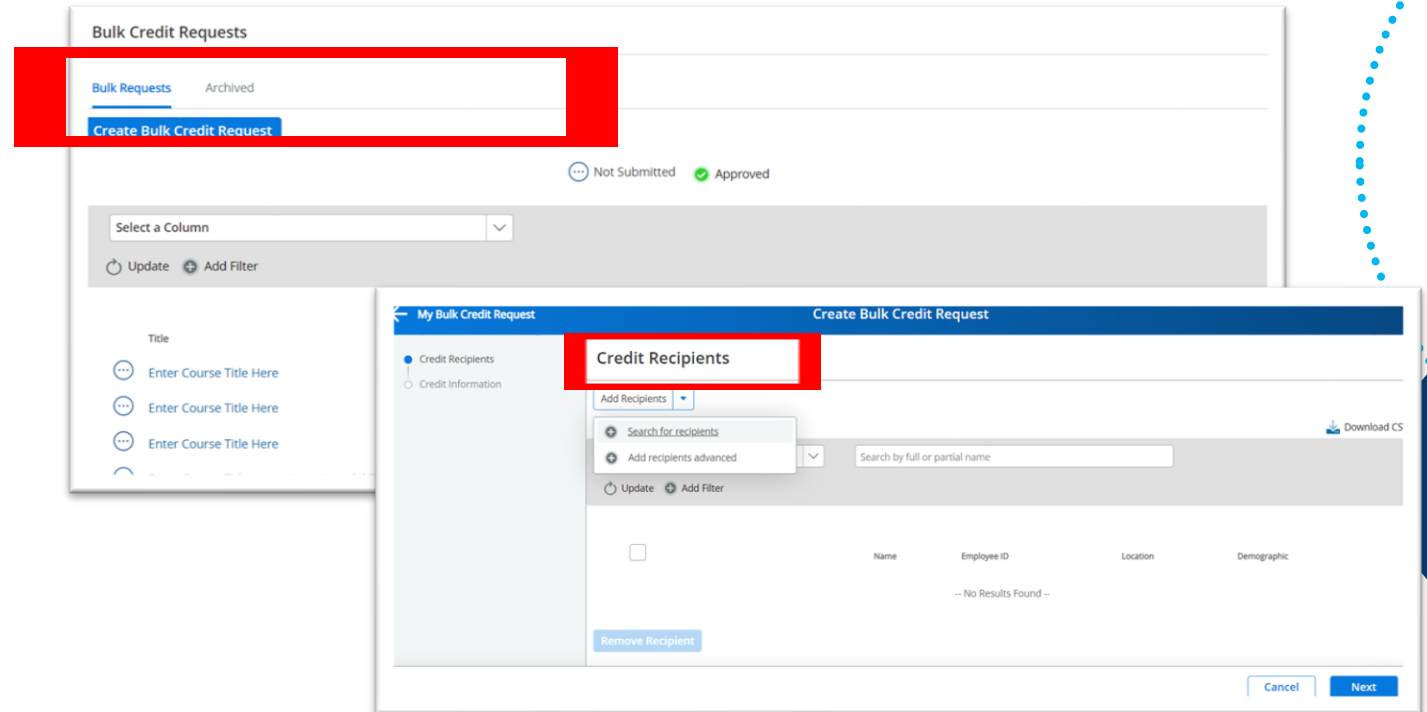
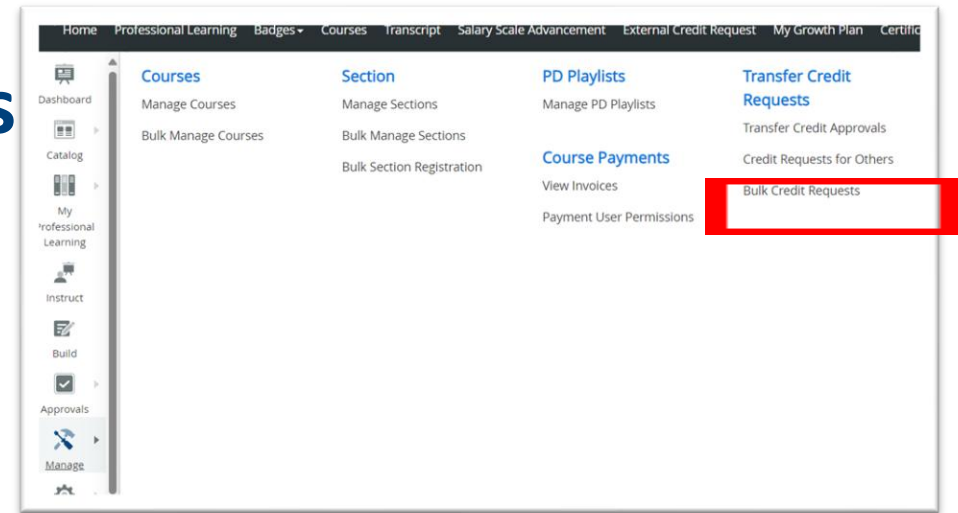
# Manage Transfer Credit Requests

You can also create requests for others. For eg a teachers has attended professional Development Classes at a University.



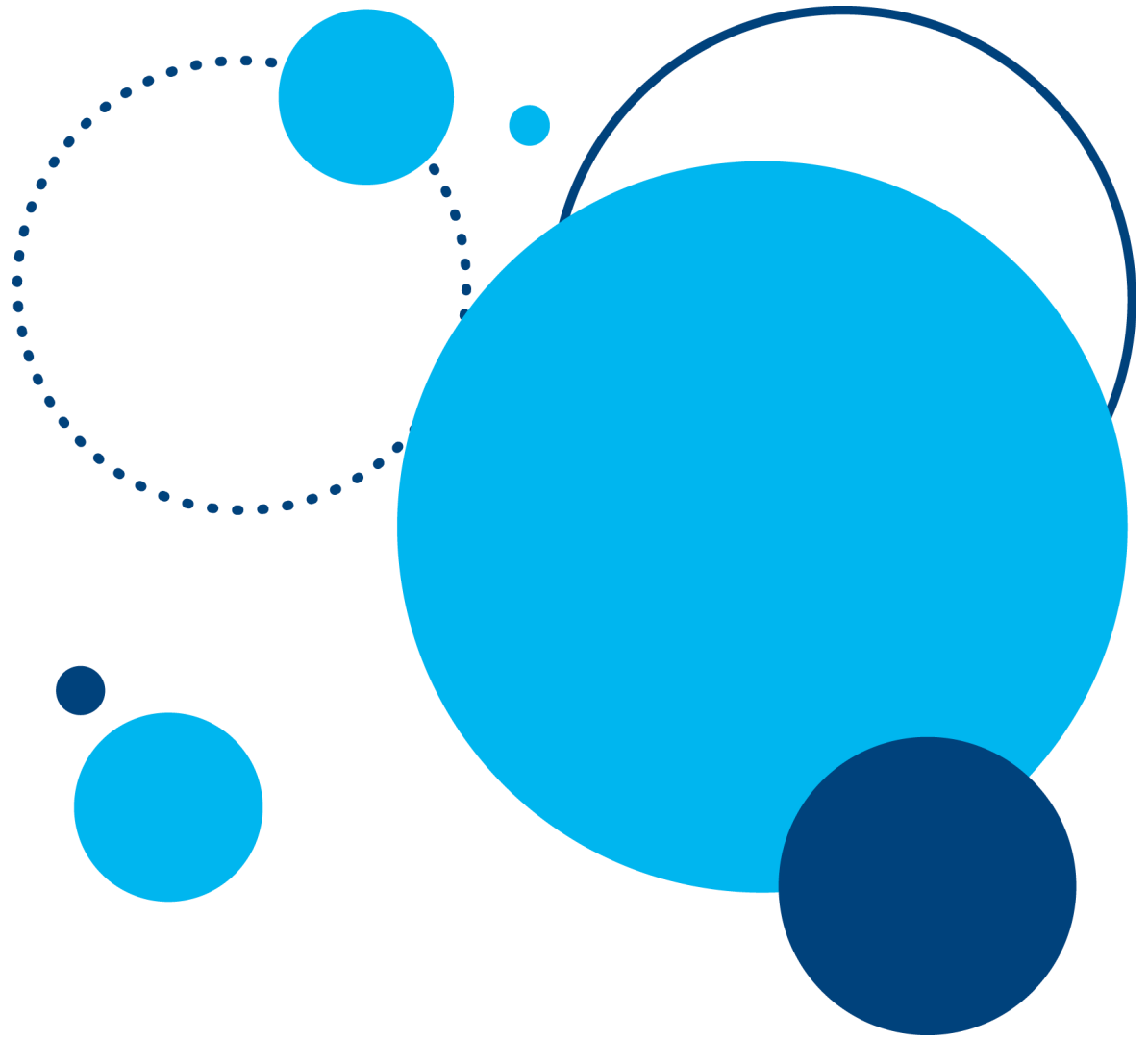
# Manage Transfer Credit Requests

You can also create Bulk credit requests for others. For eg a group of teachers have attended professional Development Classes at a University.



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# Transfer Credit Notifications





# Transfer Credit Notifications

To review the notification going out from the system for Transfer credit select Configure > Transfer Credit Manager and Configure Notifications.

- You can edit the email notifications and add Macros. Save the changes to update the emails.
- You can preview the emails
- You can also turn off some of these notifications if needed.

Email Subject	Description	Visibility
Approved Credit Request	The email sent to a credit request submitter when a credit request has been approved by a credit approver.	<input checked="" type="checkbox"/>
Denied Credit Request	The email sent to a credit request submitter when a credit request has been denied.	<input type="checkbox"/>
Pending Credit Request Submitted	The email sent to pre-approvers and credit approvers when a credit request is available for review.	<input checked="" type="checkbox"/>
Pre-Approved Credit Request	The email sent to a credit request submitter when a credit request has been Pre-approved by the final Pre-Approver.	<input checked="" type="checkbox"/>
Returned to Pending Credit Request	The email sent to a credit request submitter when a credit request has been returned to pending.	<input checked="" type="checkbox"/>

**Macros**

- \$(lastname): The last name of the administrator who performed the action
- \$(firstname): The first name of the administrator who performed the action
- \$(actorEmail): The email of the administrator who performed the action
- \$(teacherlastname): The last name of the credit request submitter.
- \$(teacherfirstname): The first name of the credit request submitter.

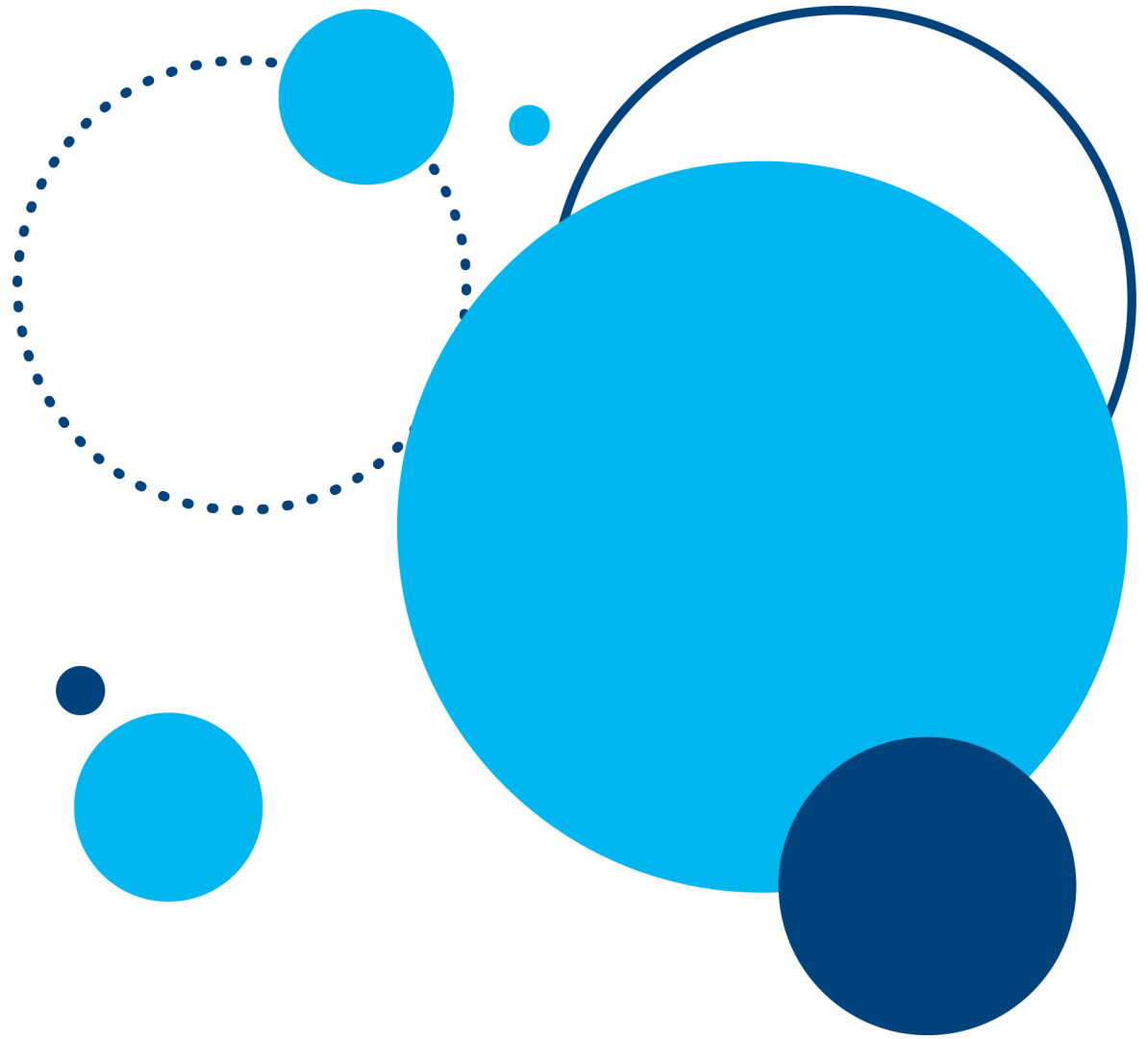
**Approved Credit Request**

Email/Notification Subject: Approved Credit Request

Message: Dear \$(teacherfirstname) \$(teacherlastname), Your credit request for \$(creditRequestTitle) has been approved by \$(firstname) \$(lastname) - \$(actorEmail). To review this request, click: \$(creditRequestViewUrl)

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# Roles and Permissions



# Roles and Permissions

To add people to Transfer credit Manager role you need to select Configure and select Roles and Permissions.

- On the Transfer Credit Manager tab you can add users as Transfer Credit Managers.
- You can define if they will have access to configure Approval Process by adding a check mark.
- You can also remove people from the role of Transfer credit Manager by clicking on the trash can icon.

Roles and Permissions

Office-Based Roles Instructors Office Super Users PD Playlist Site-Based Rights (Group Types) **Transfer Credit Manager**

**Add Users**

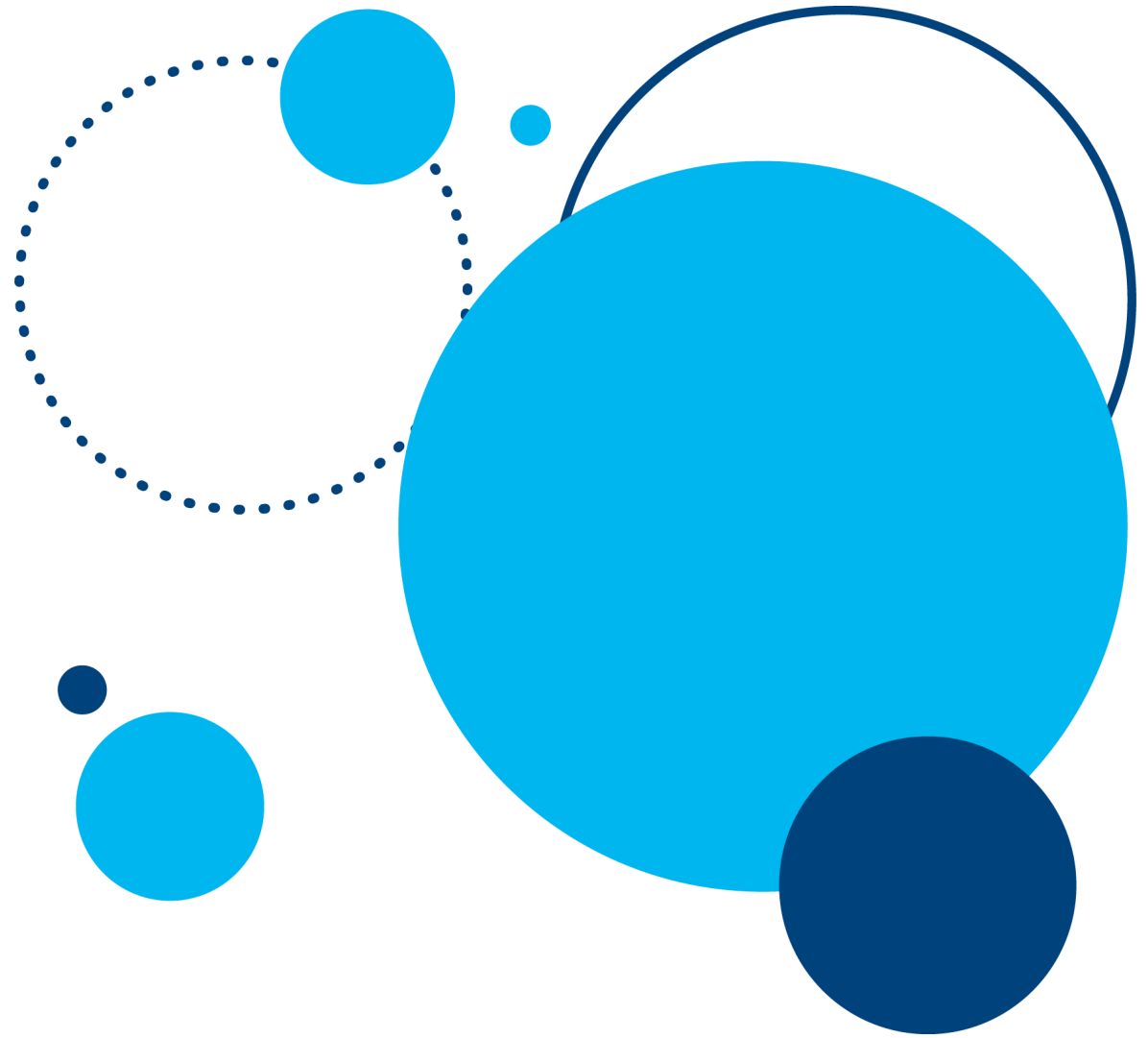
Name  Search by full or partial name

Update Add Filter

Name	Email	Account Status	Can Configure Approval Processes	
Administrator, PowerSchool	noreply@truenorthlogic.com	Active	<input type="checkbox"/>	
Banner, Bruce	-	Active	<input checked="" type="checkbox"/>	
CourseAdmin1, Test	annie.zager@powerschool.com	Active	<input checked="" type="checkbox"/>	
CourseApprover1, Test	noreply@truenorthlogic.com	Active	<input type="checkbox"/>	

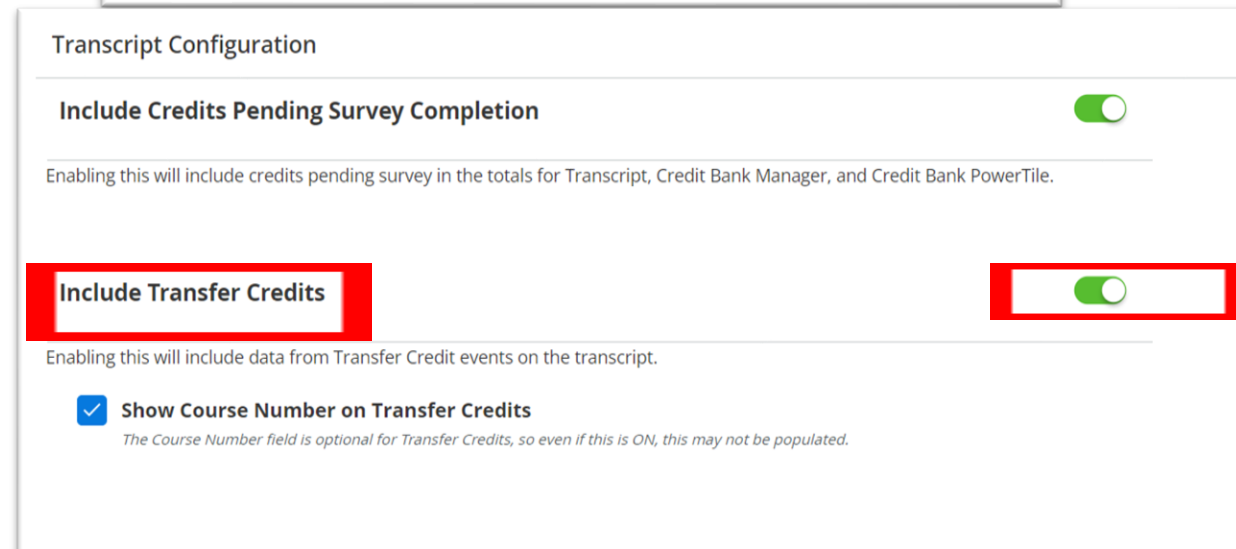
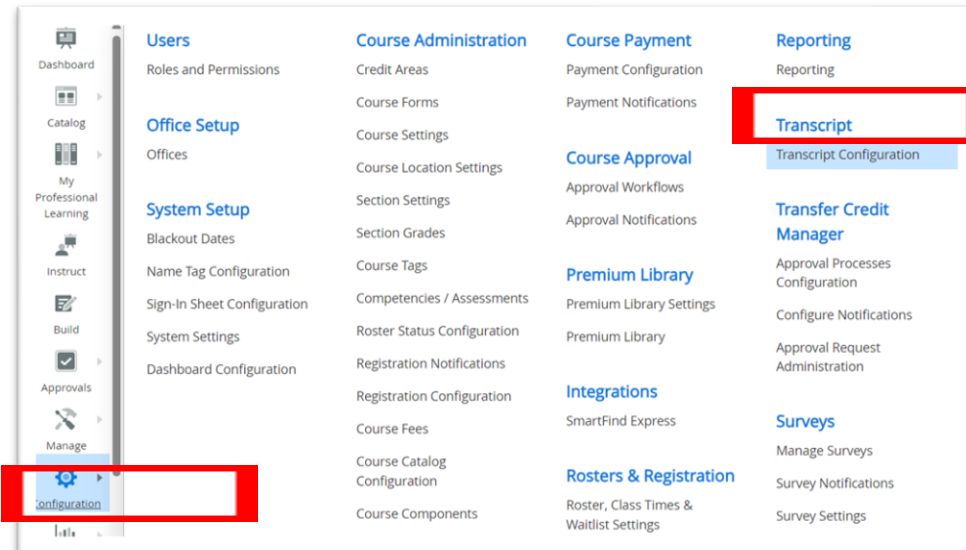
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# Adding External Credit Requests to Transcripts



# Adding External Credit Requests to Transcripts

- To add External Credit select Configuration and then select Transcript Configuration.
- Next turn on the feature Include Transfer Credits and you can select Show Course Number On Transfer Credits as needed.





# Upcoming Talent PowerUp Meetings

- **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
- **Perform:** Ask the Experts
  - Tuesday, February 4, 2025
- **Professional Learning:** TBD
  - Wednesday, February 5, 2025

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

