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Personalized Education for Every Journey

Welcome to the PowerSchool Professional Learning PowerUp!

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Tracking Professional Development through External Credit Requests

Marissa Gonzalez – Education Impact Consultant

Dhivya Sudarshan – Education Impact Consultant

January 8, 2025

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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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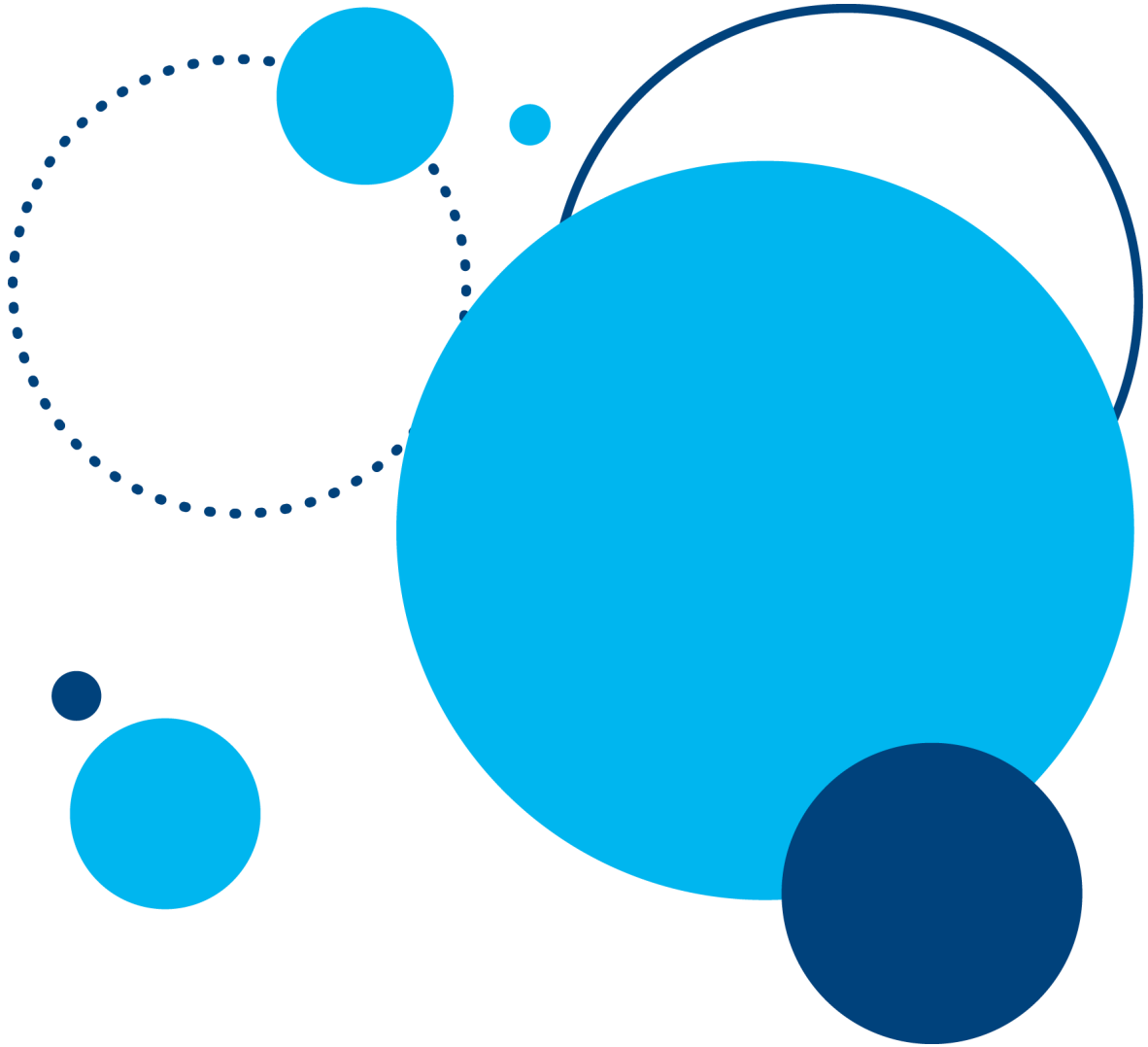
External Credit Requests



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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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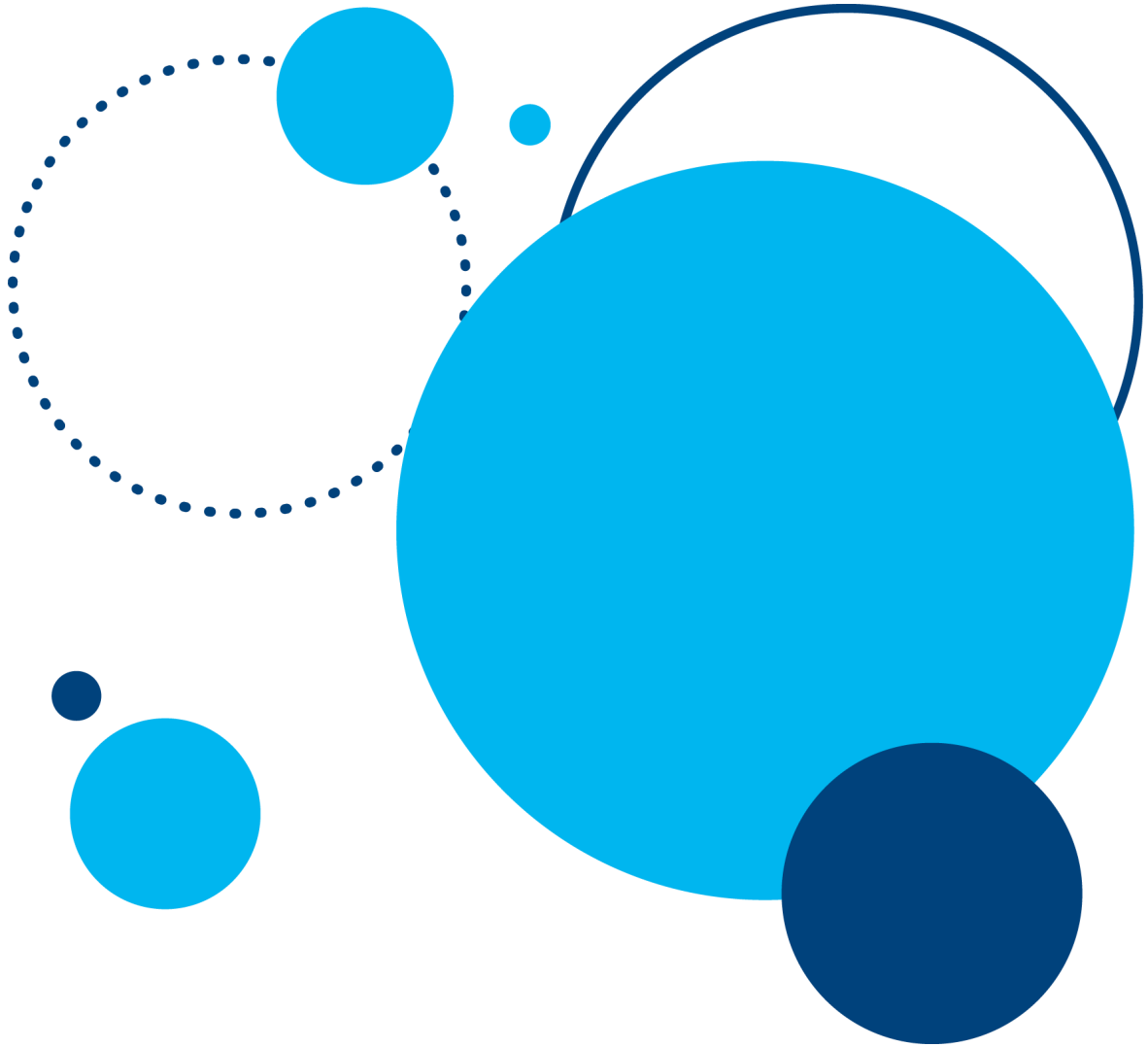
Transfer Credit Workflows



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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.

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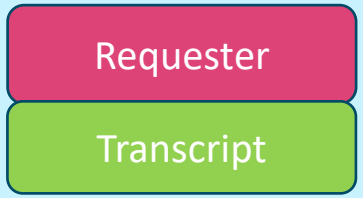
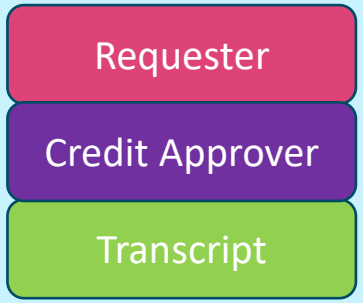
Workflows

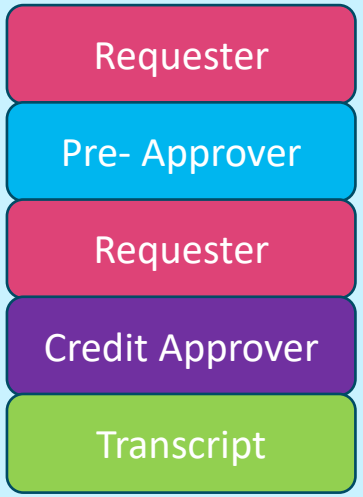
Auto Approval



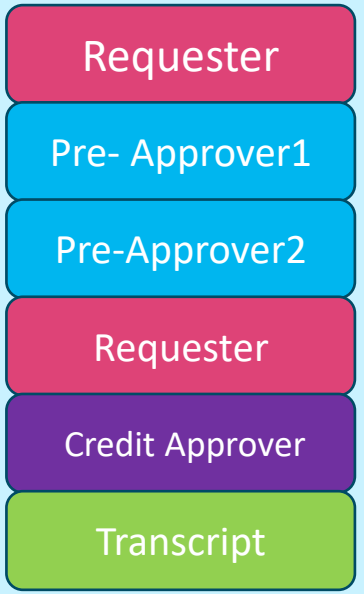
No Pre- Approval, 1 Credit Approval



1 Pre-Approval, 1 Credit Approval



2 Pre-Approval, 1 Credit Approval



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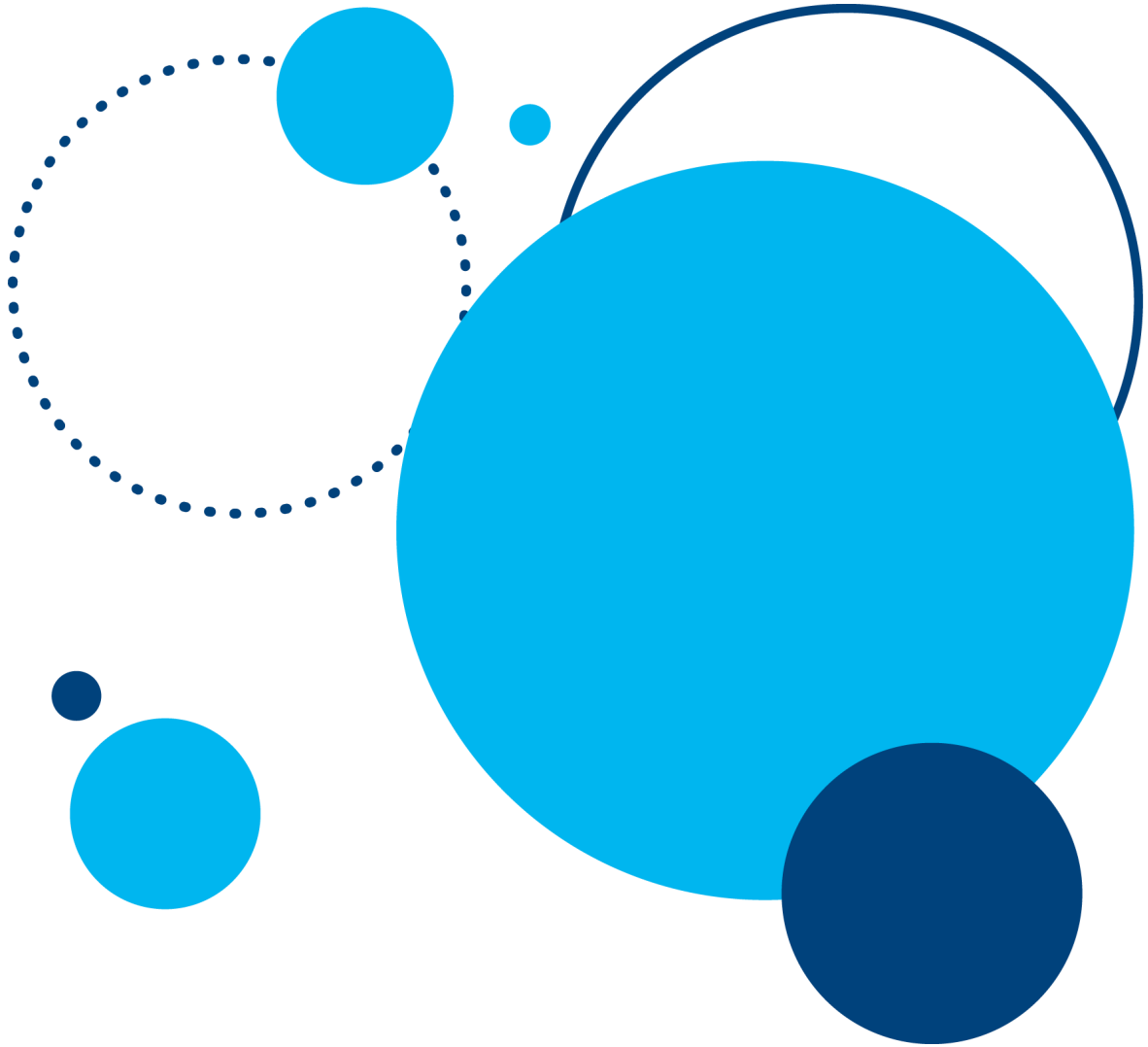
Approval Process Configuration



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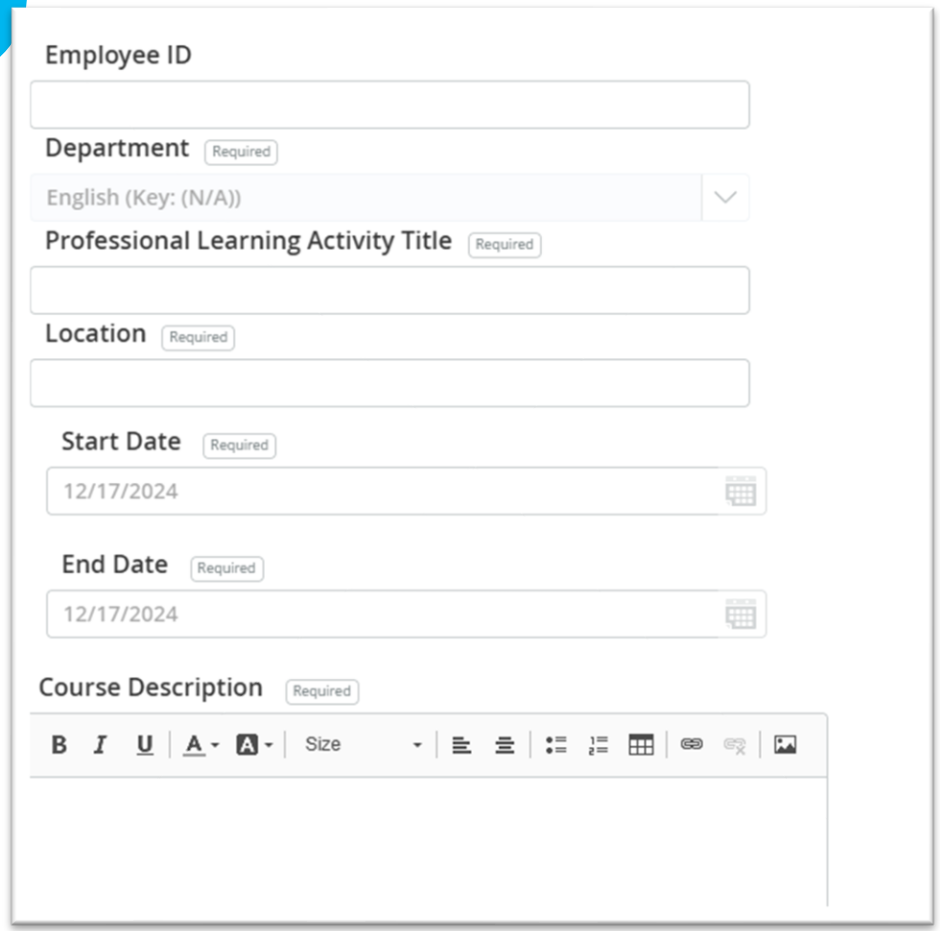
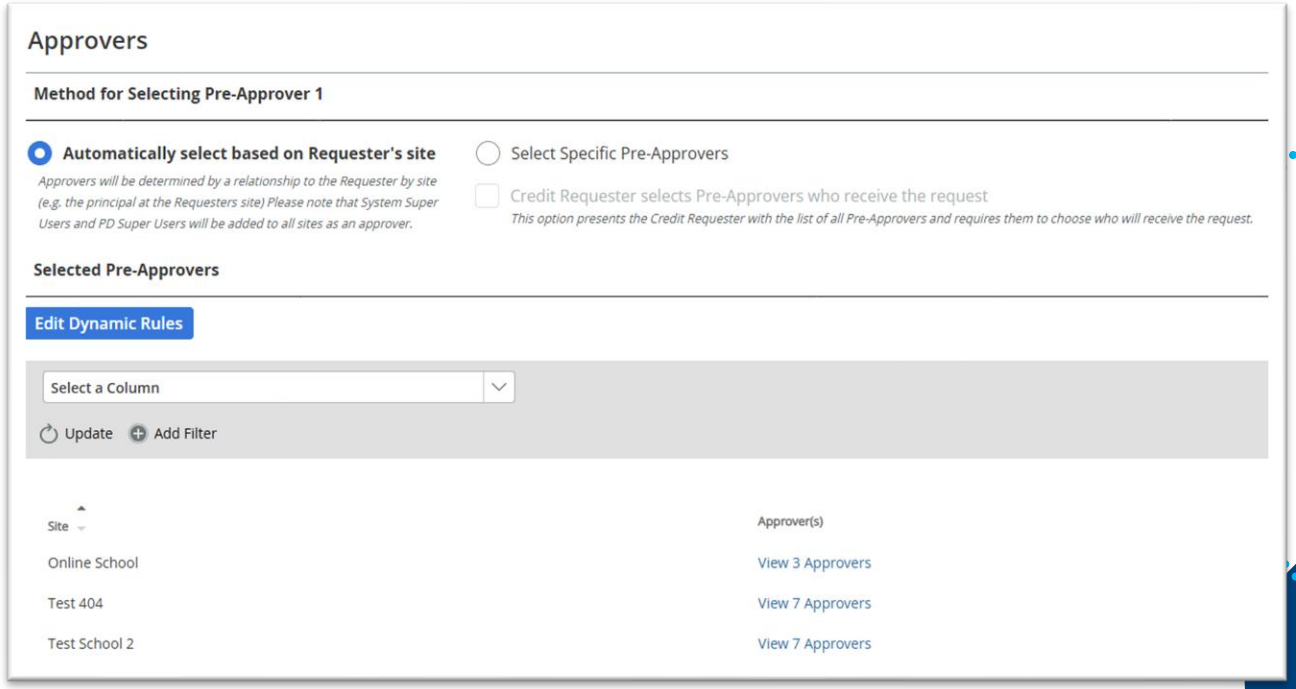
Approval Process Configuration

Forms



Approvers



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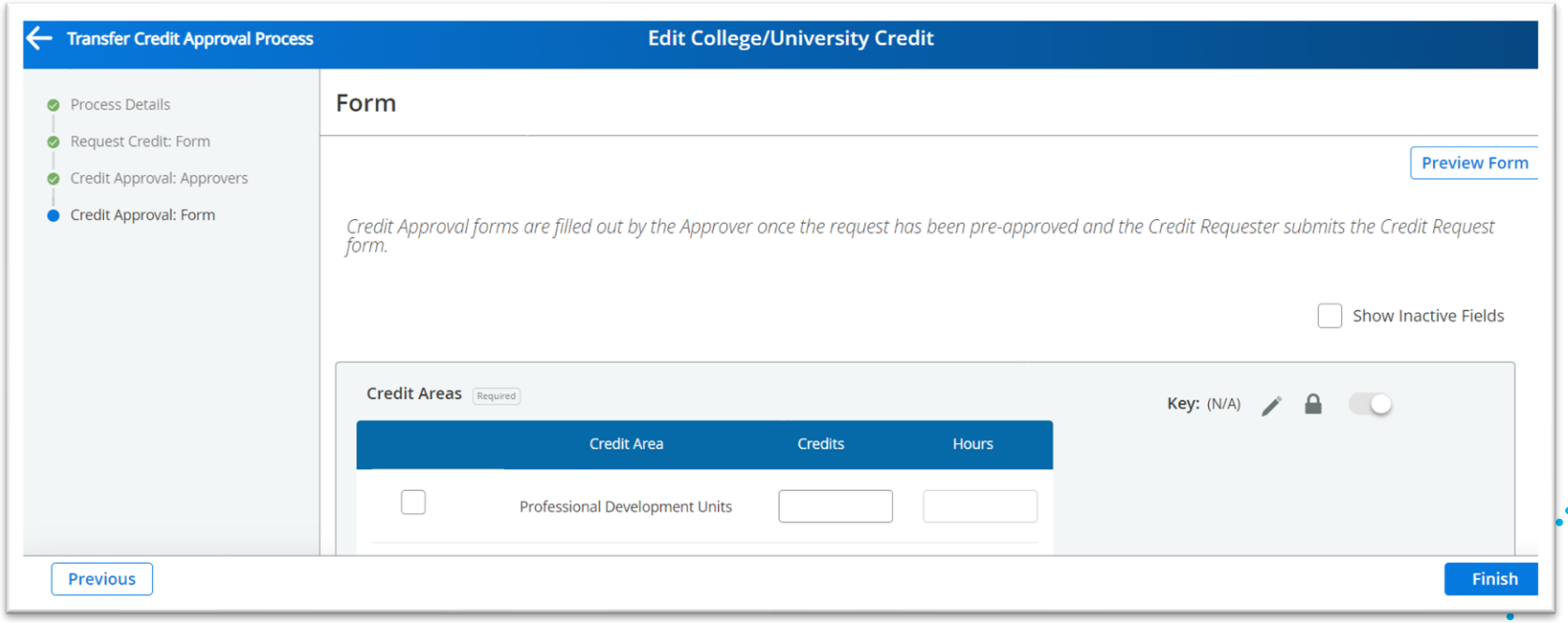
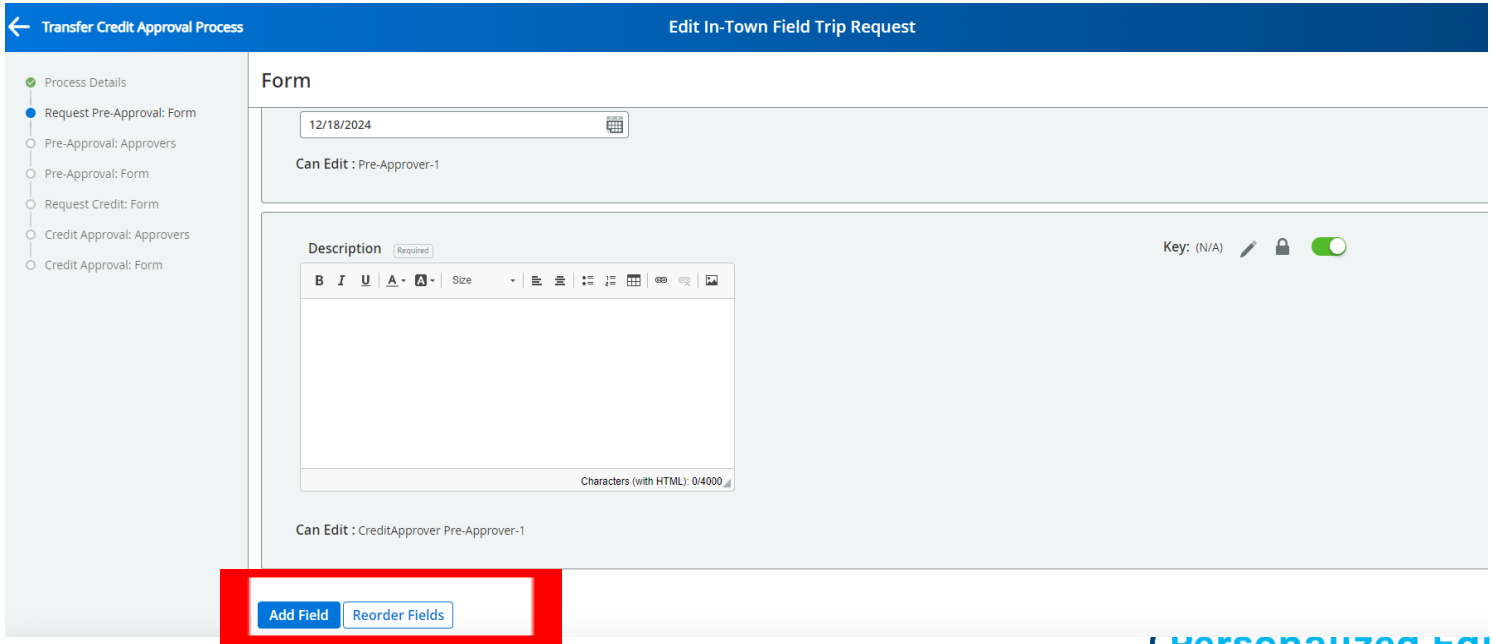
Forms

- 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.





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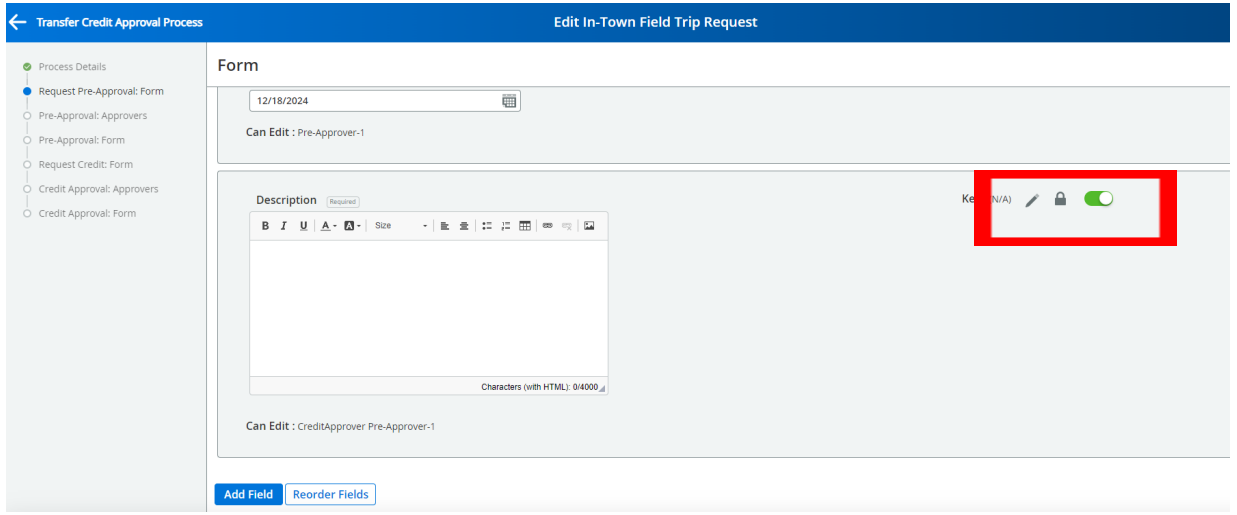
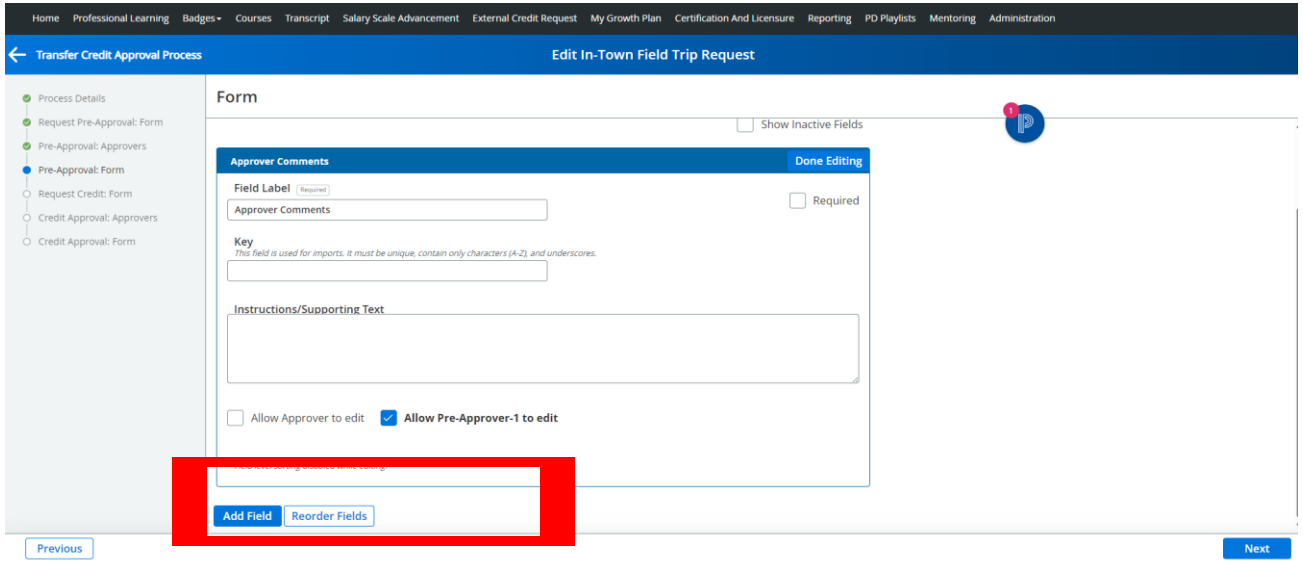
Forms

- 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.





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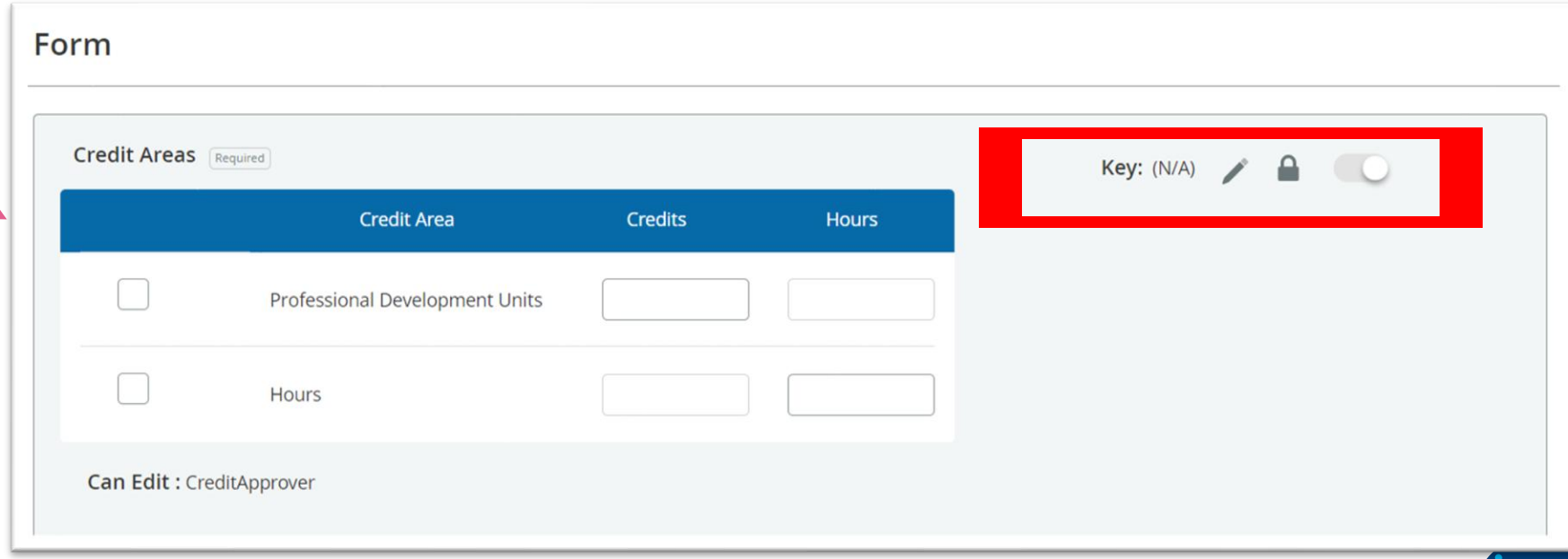
Forms

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



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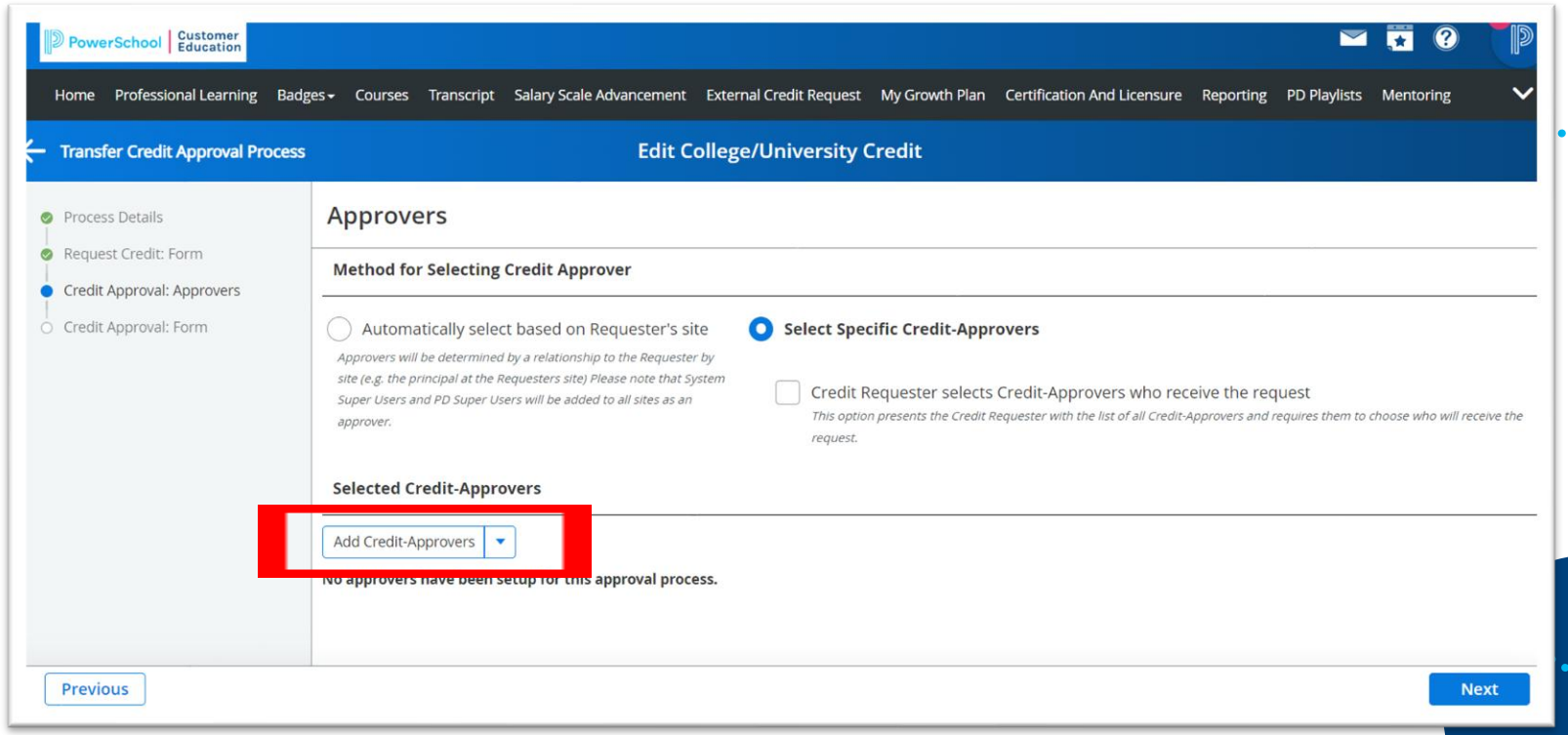
Approvers

- 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.



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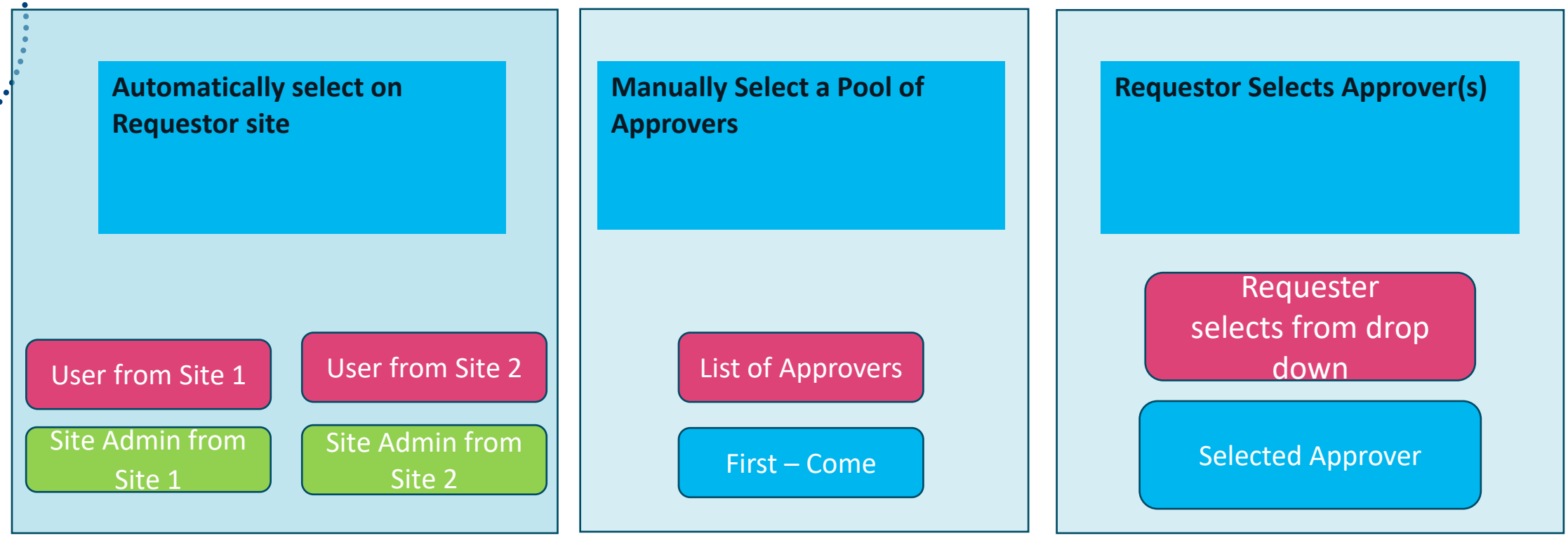
Options in Approval Assignments



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

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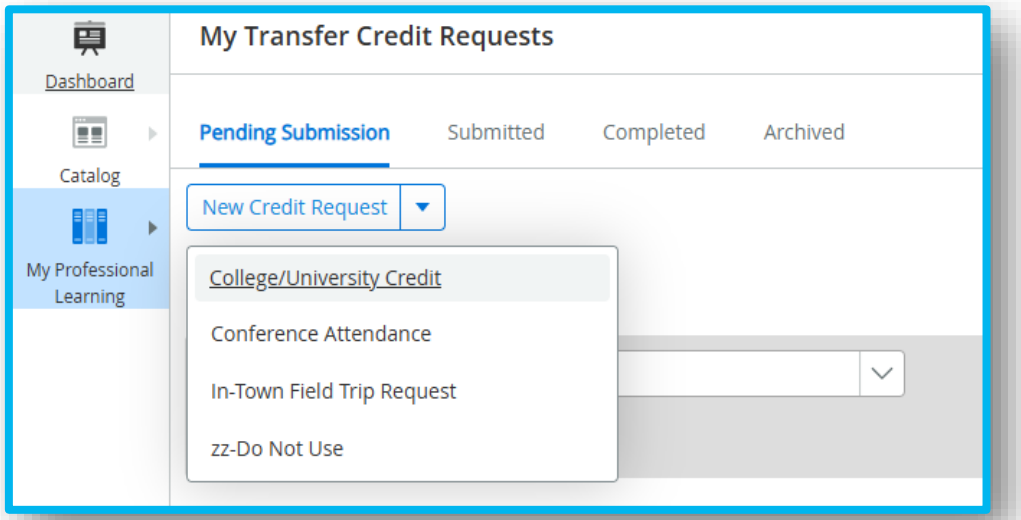

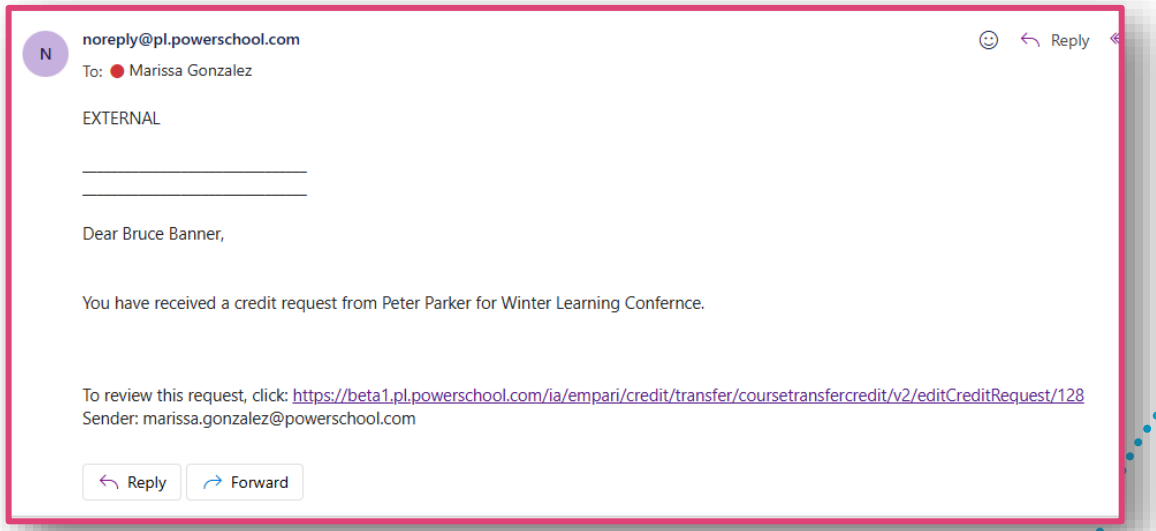

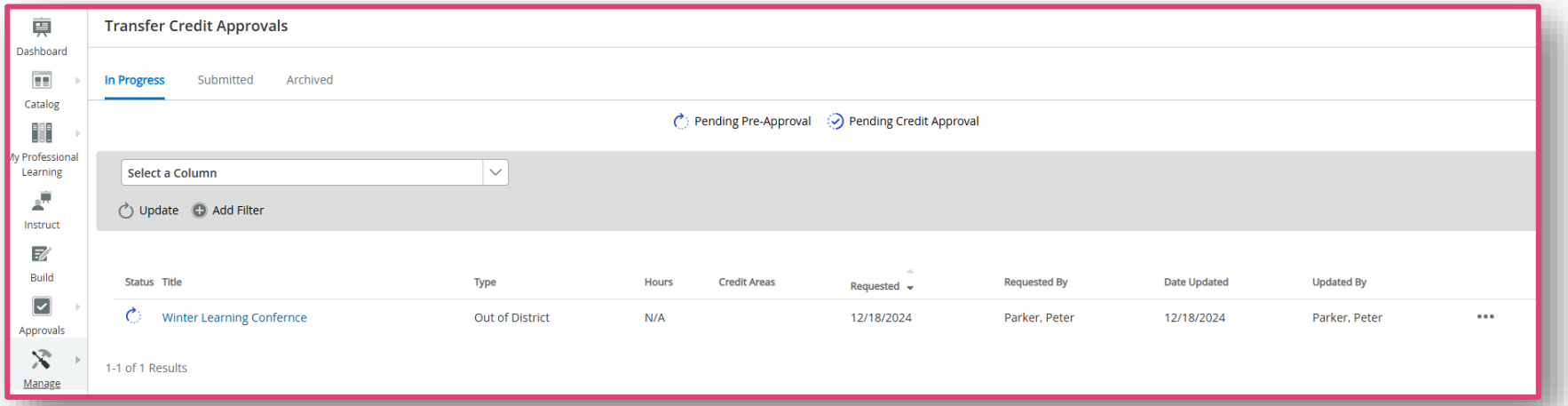

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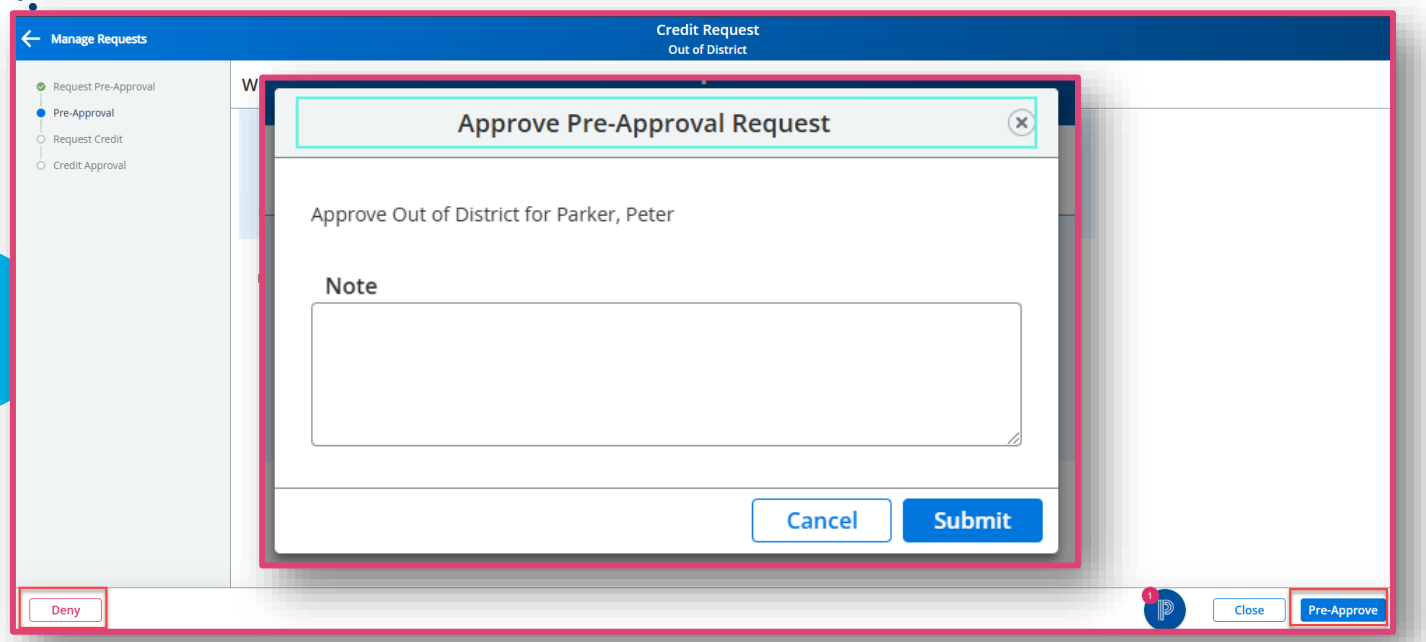

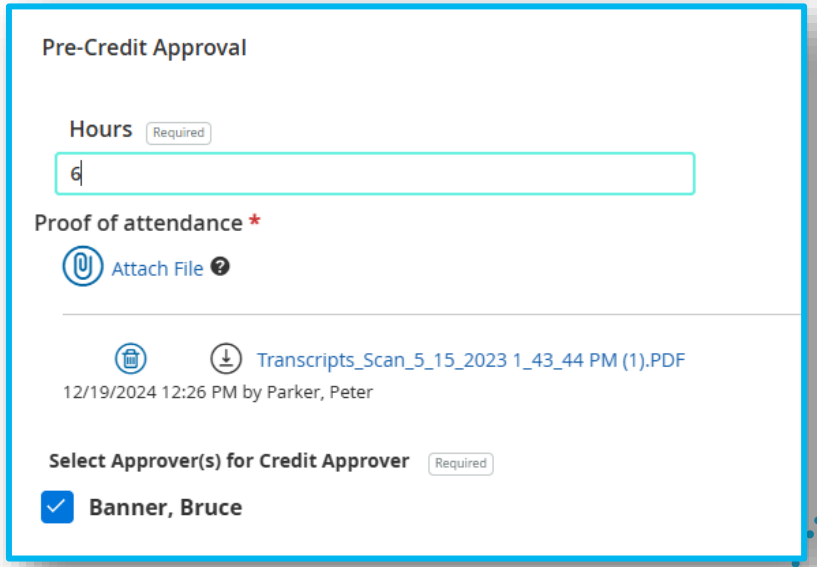

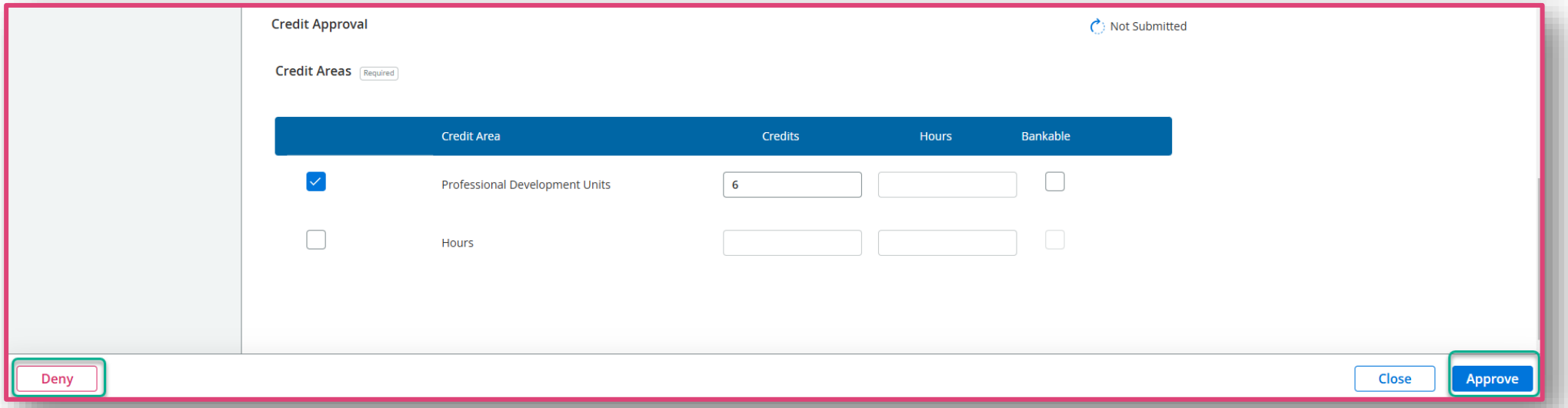

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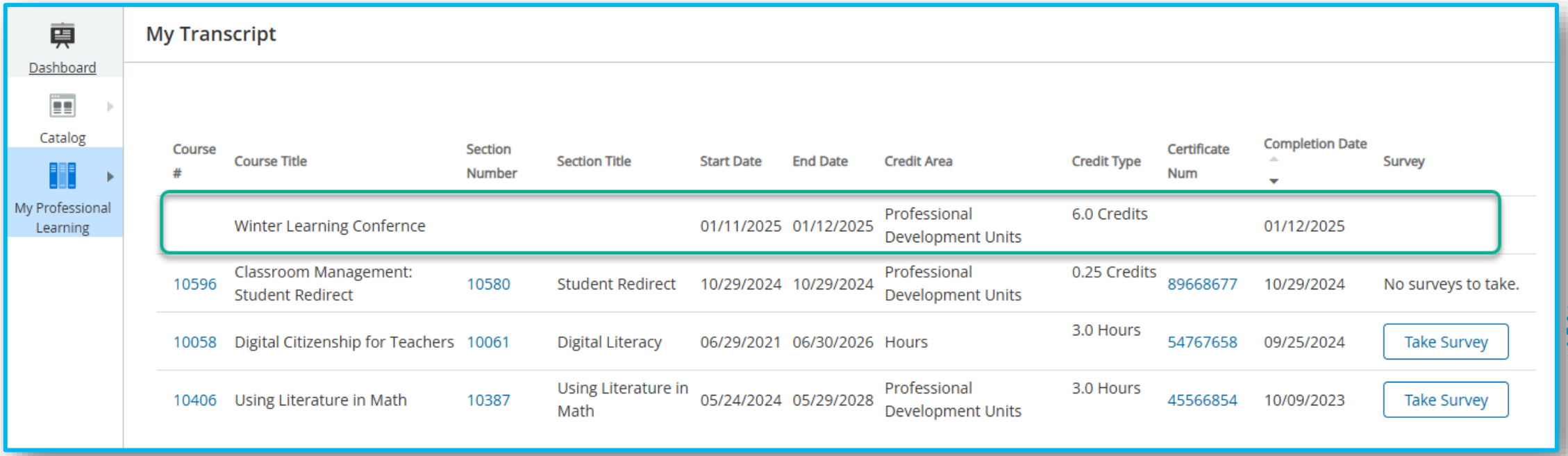

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Approval Request Administration Dashboard and Manage Credit Requests

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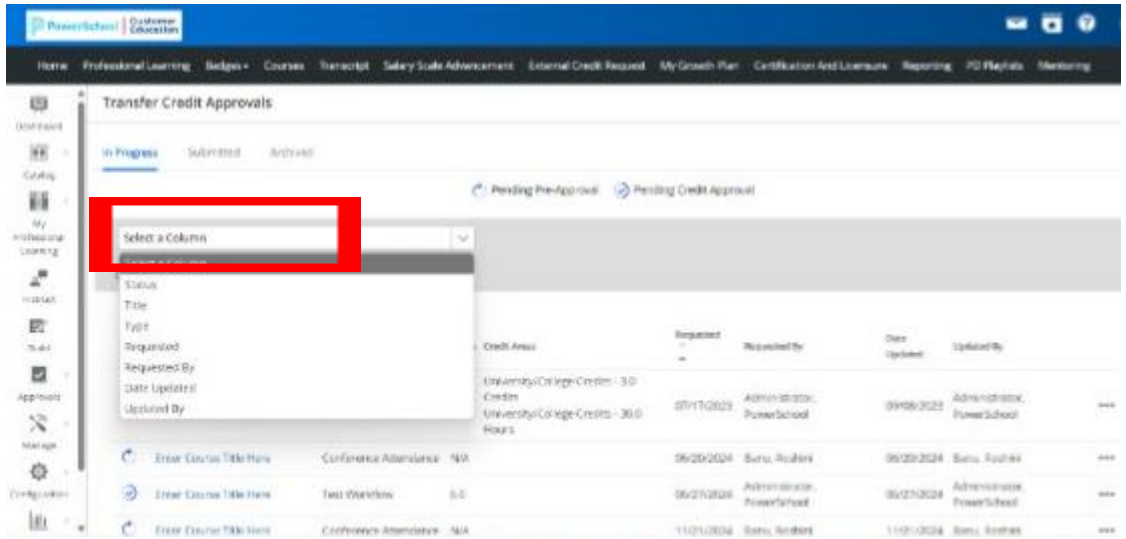
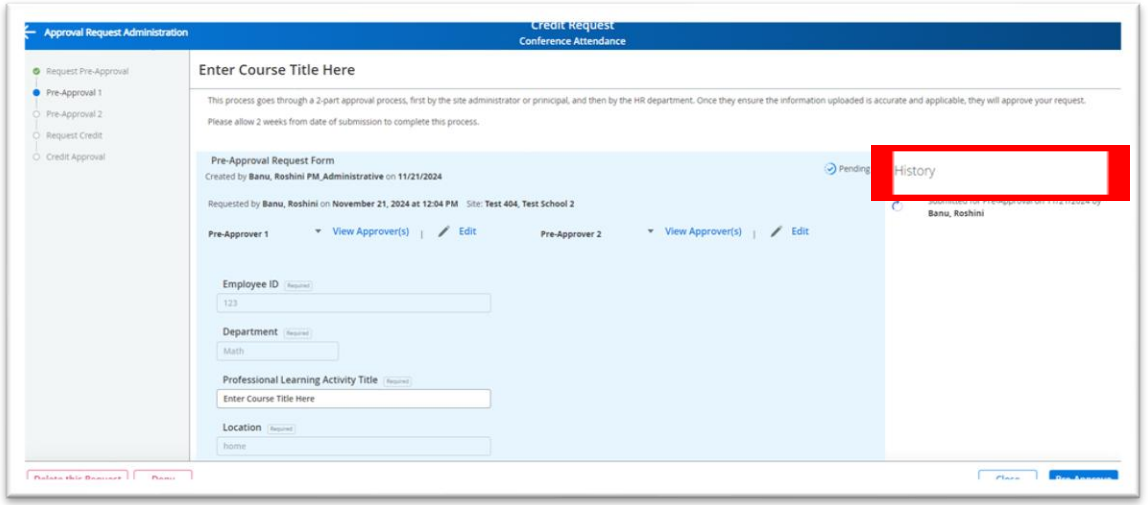
Approval Request Administration Dashboard

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.





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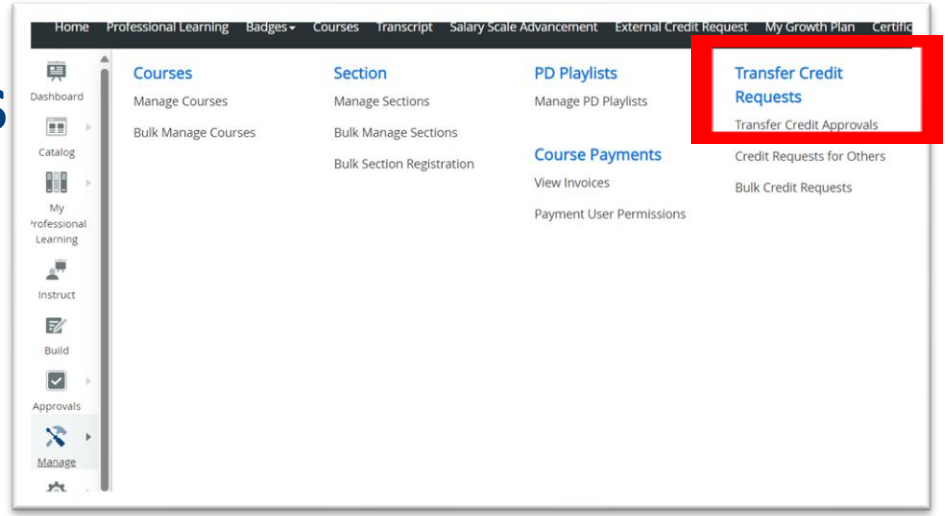
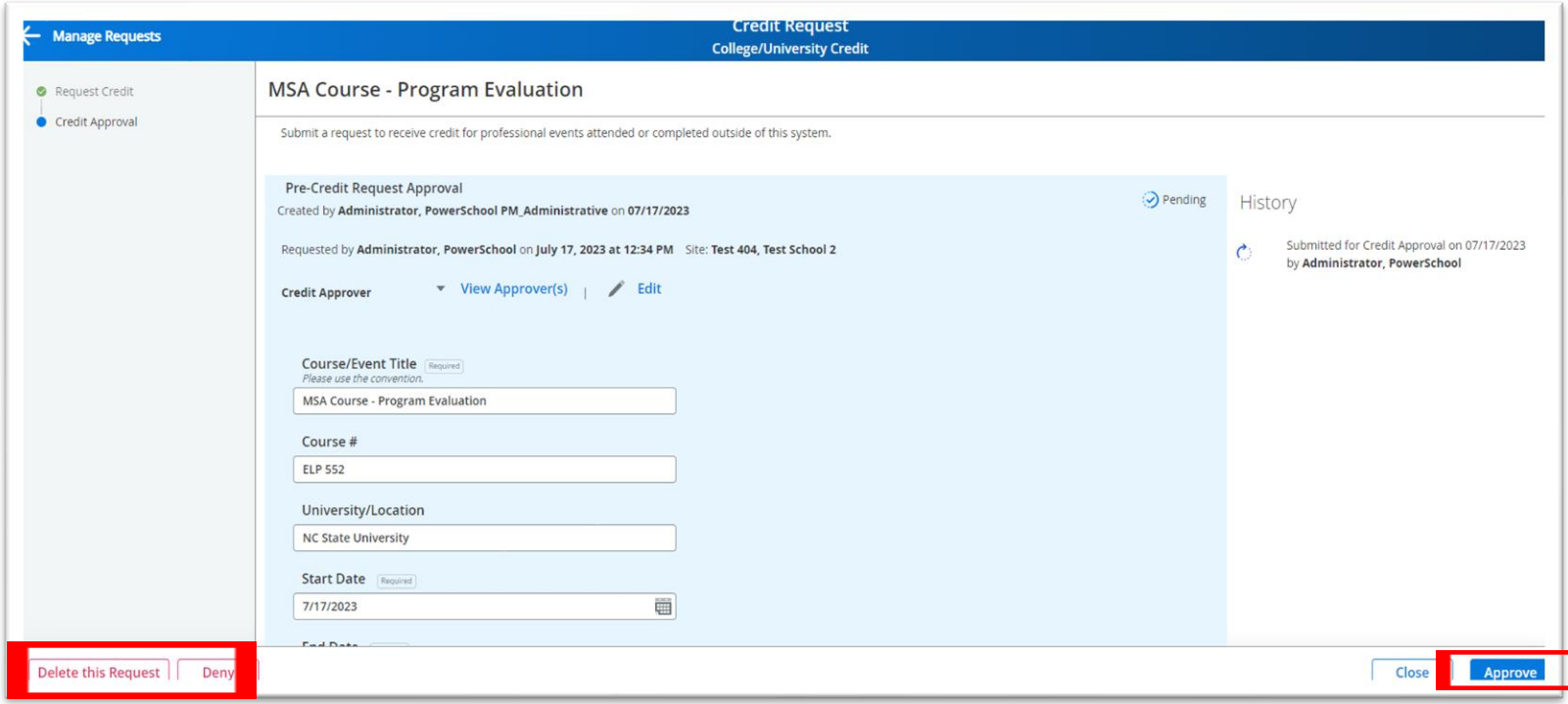
Manage Transfer Credit Requests

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.





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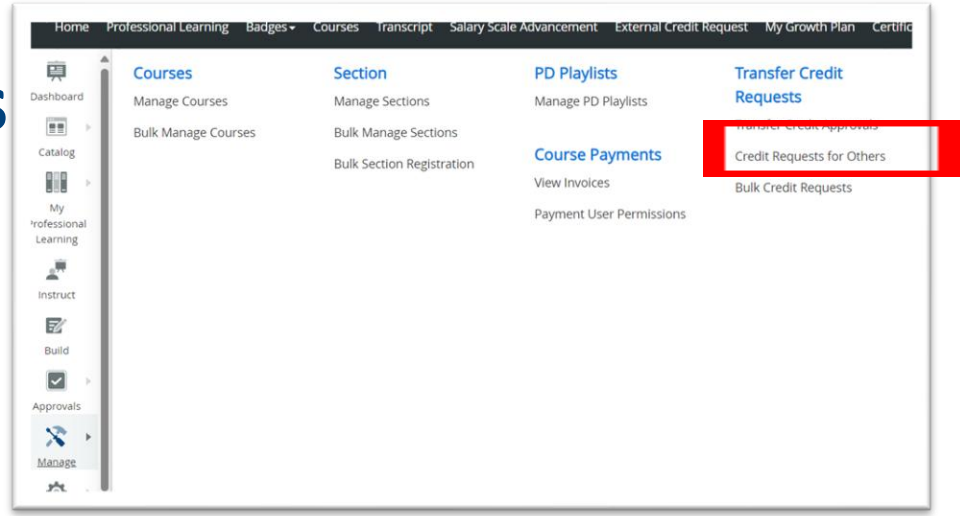
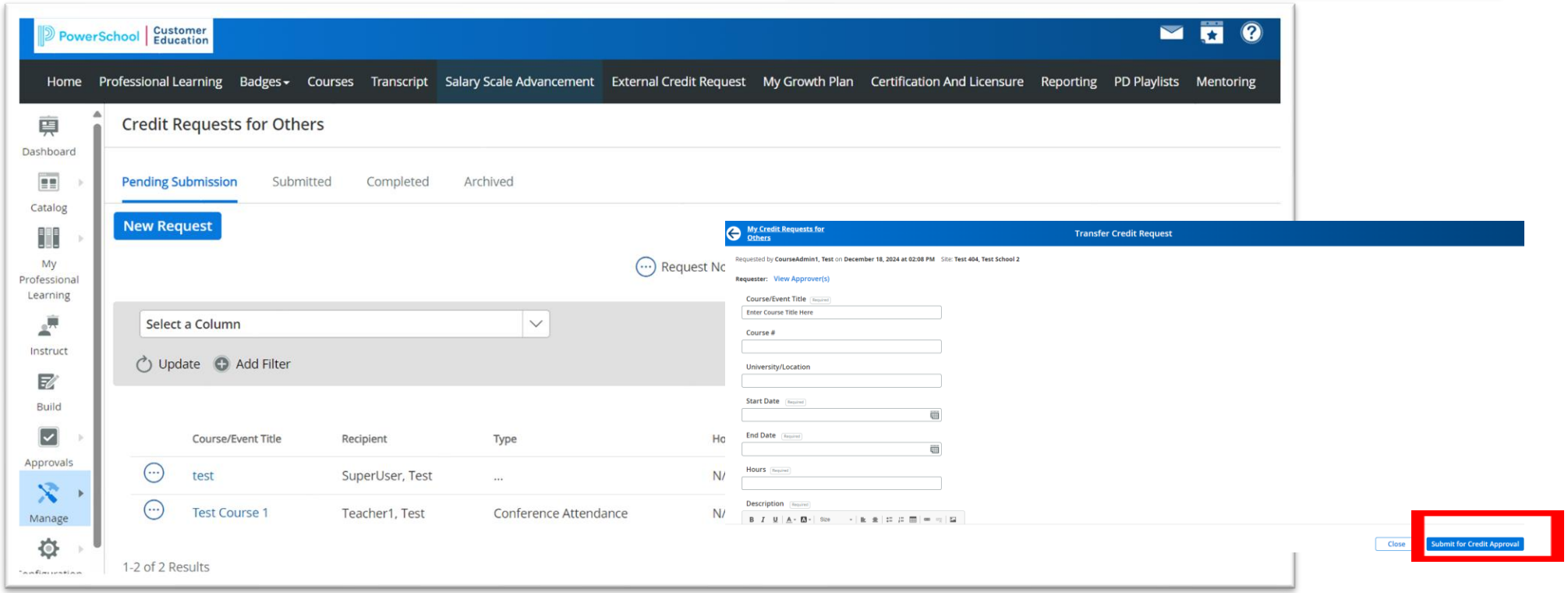
Manage Transfer Credit Requests

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





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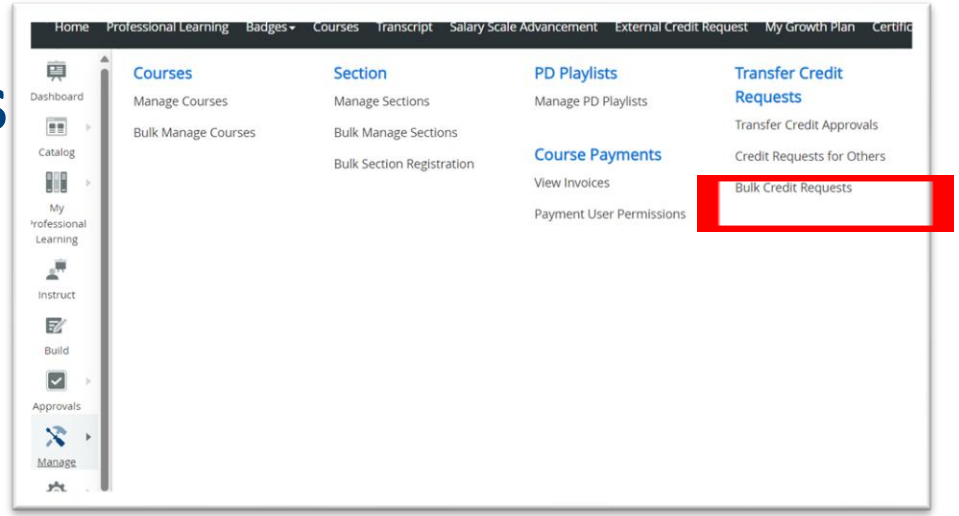
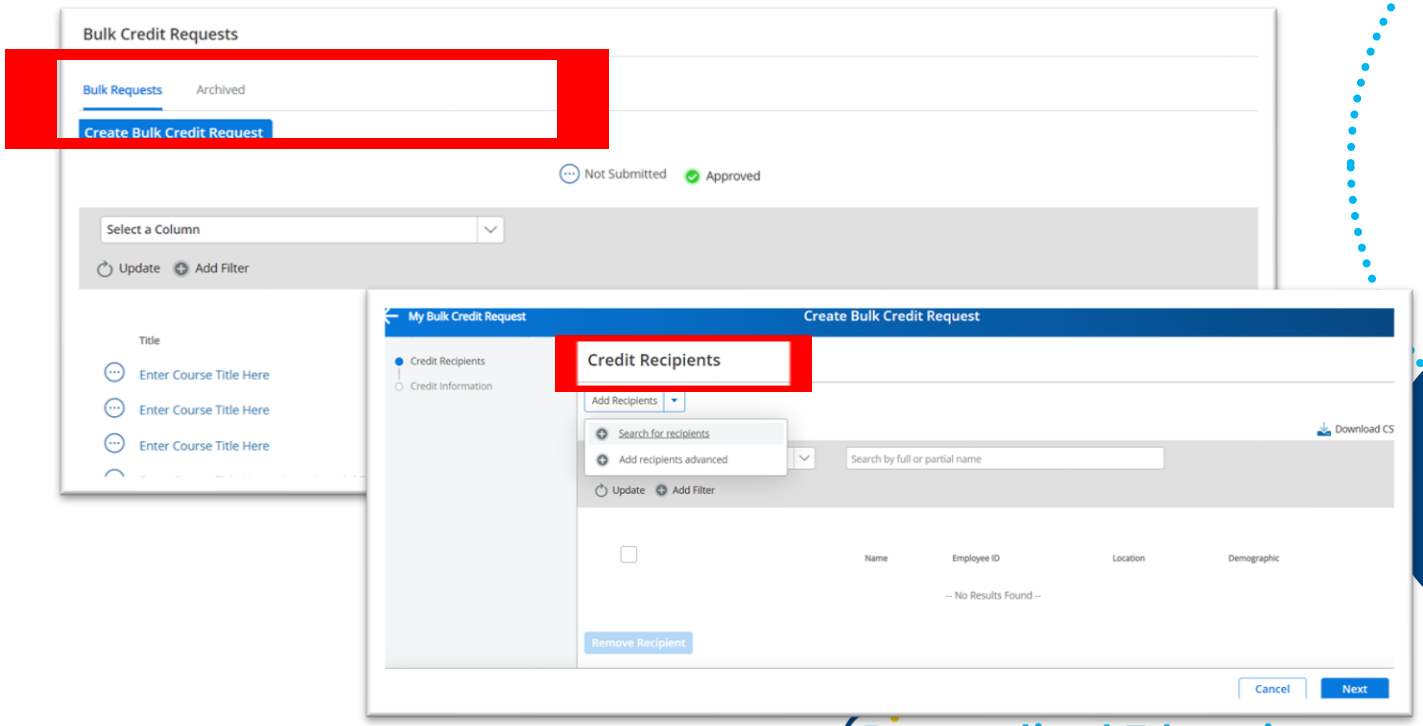
Manage Transfer Credit Requests

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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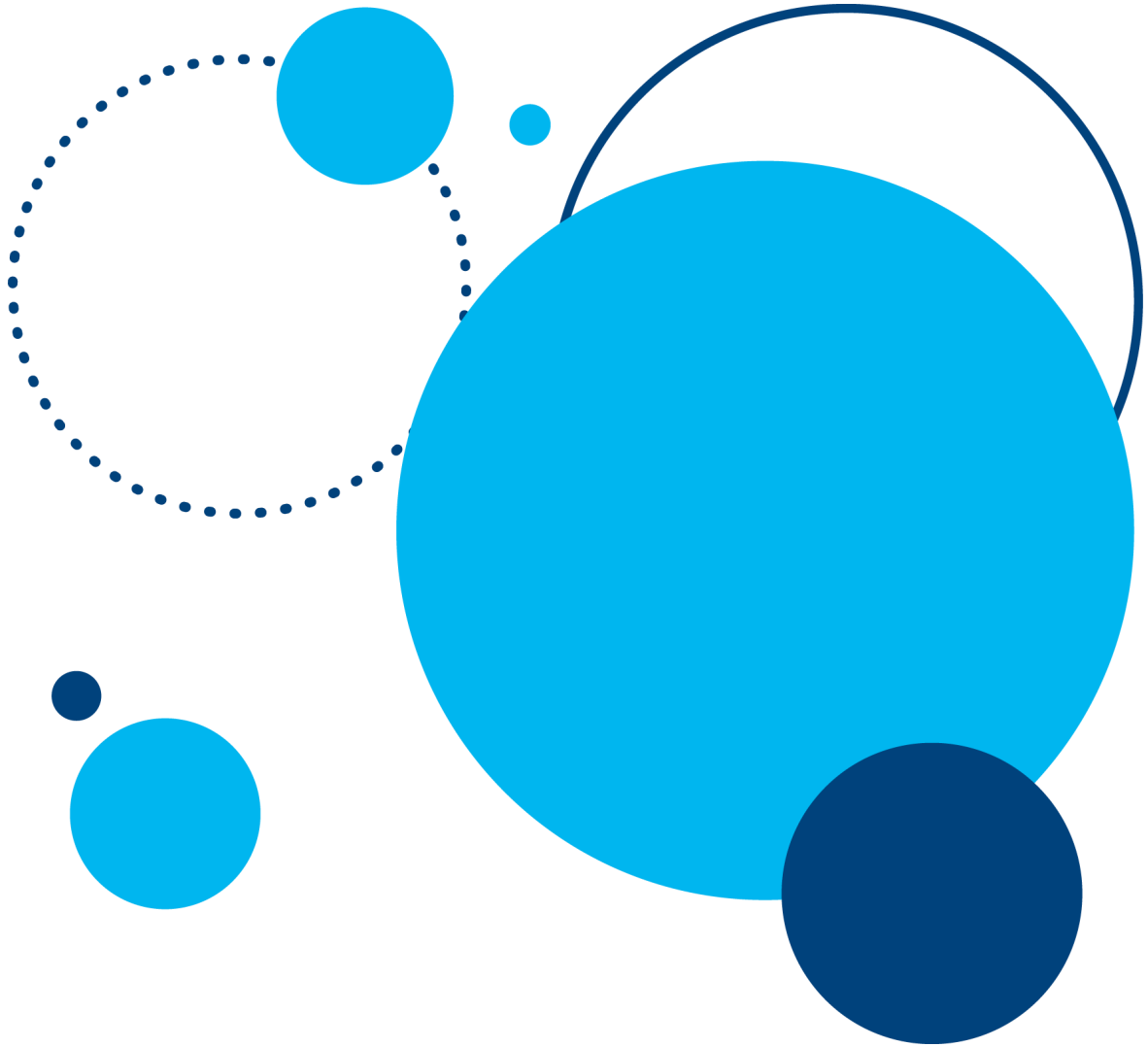
Transfer Credit Notifications



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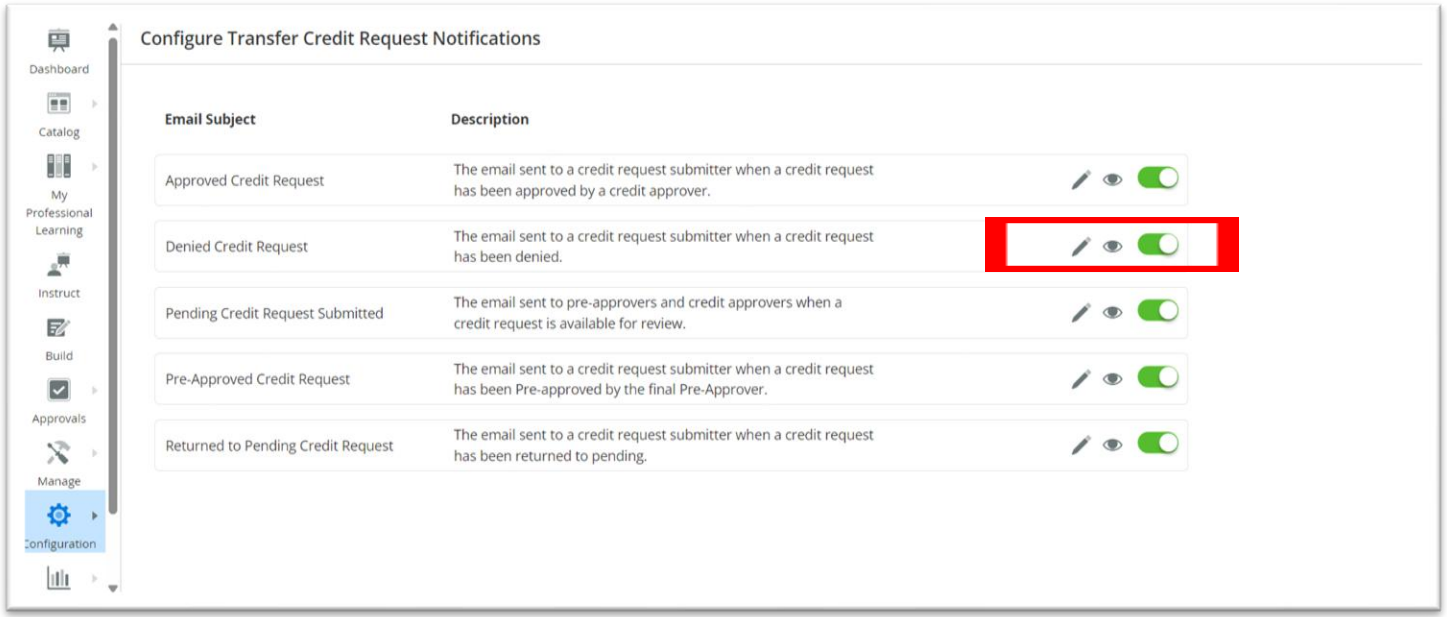
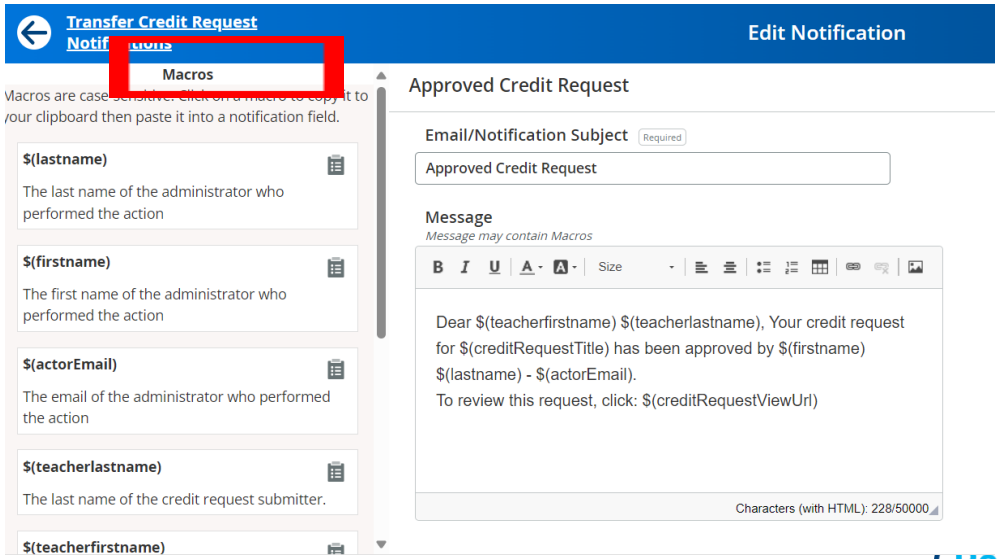
Transfer Credit Notifications

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 off these notifications if needed.





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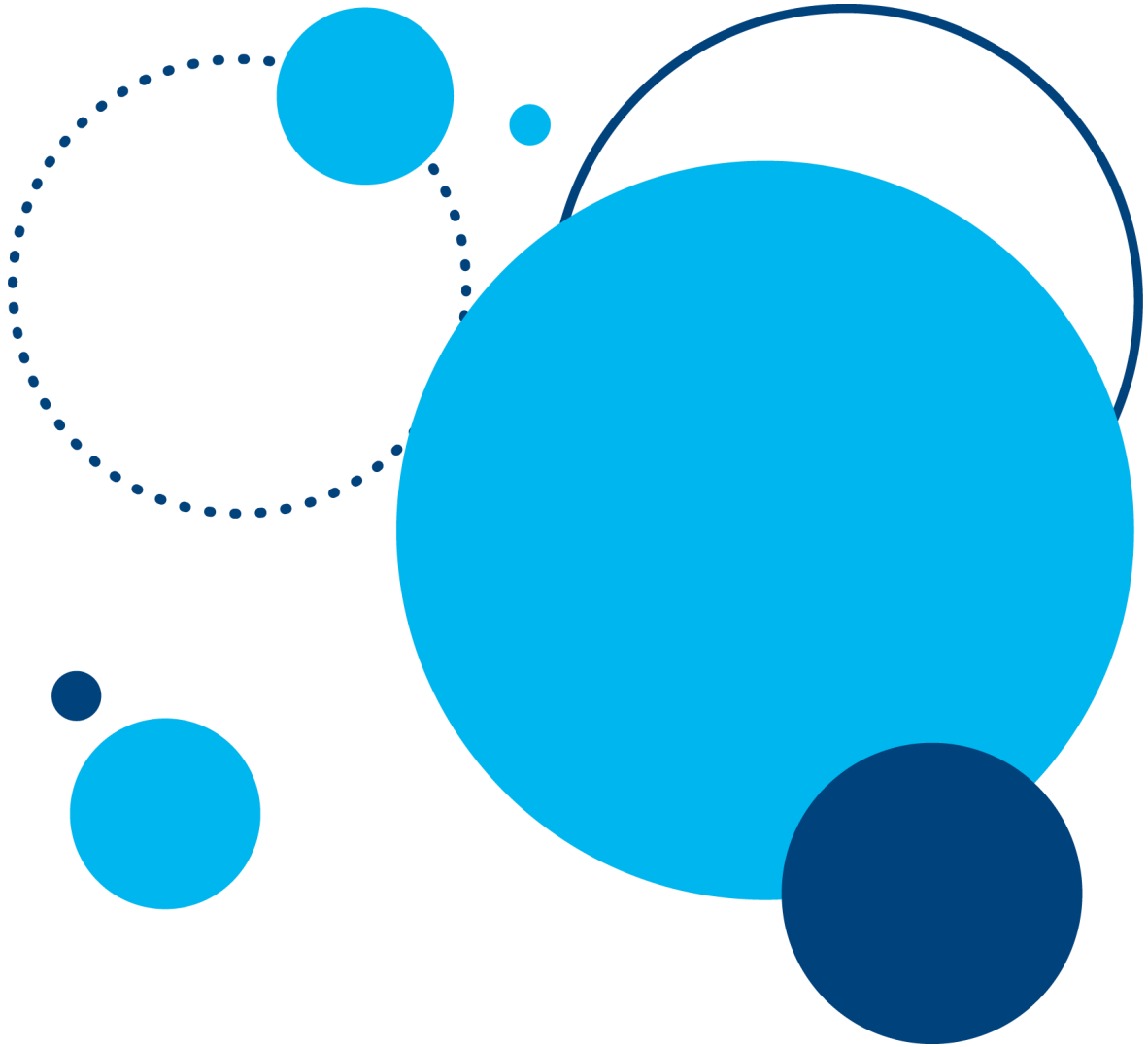
Roles and Permissions



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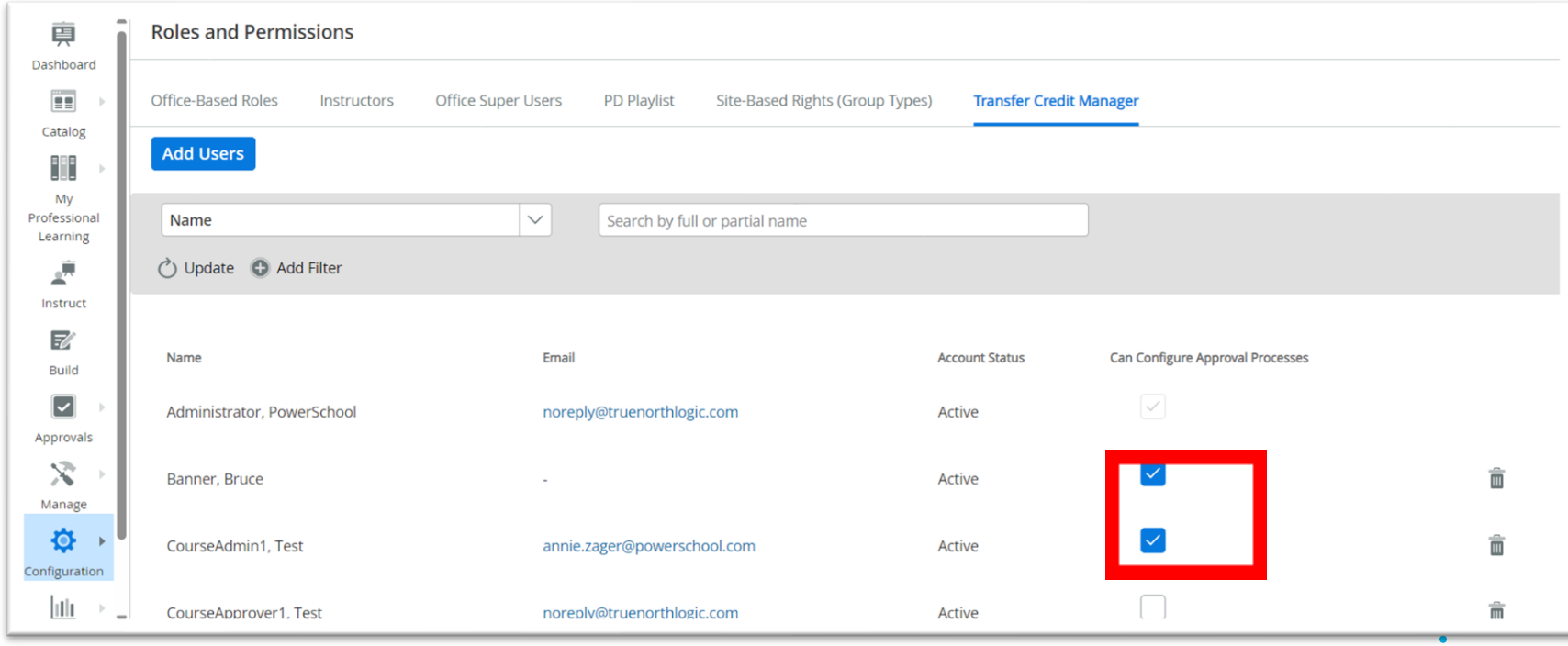
Roles and Permissions

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.



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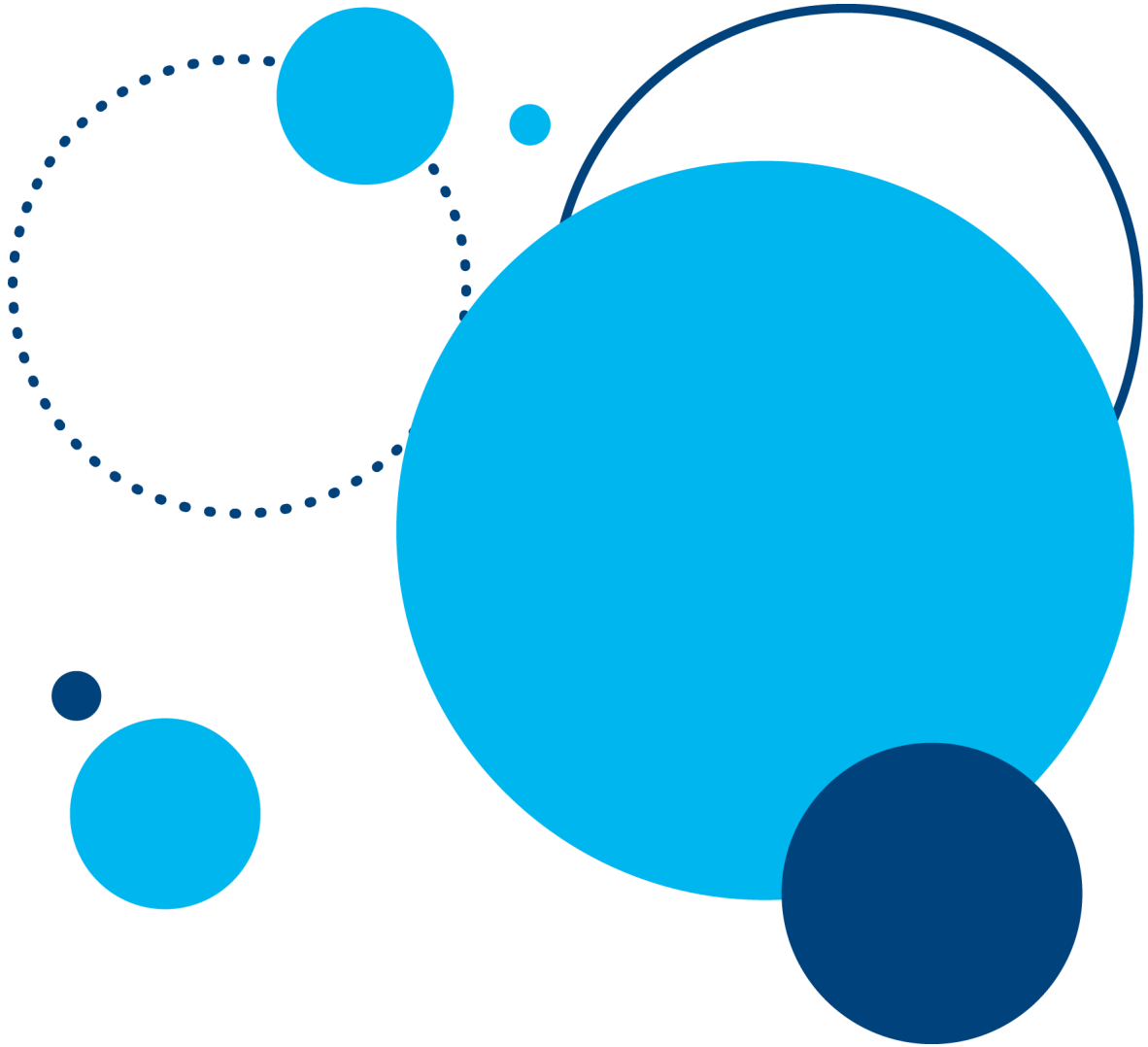
Adding External Credit Requests to Transcripts



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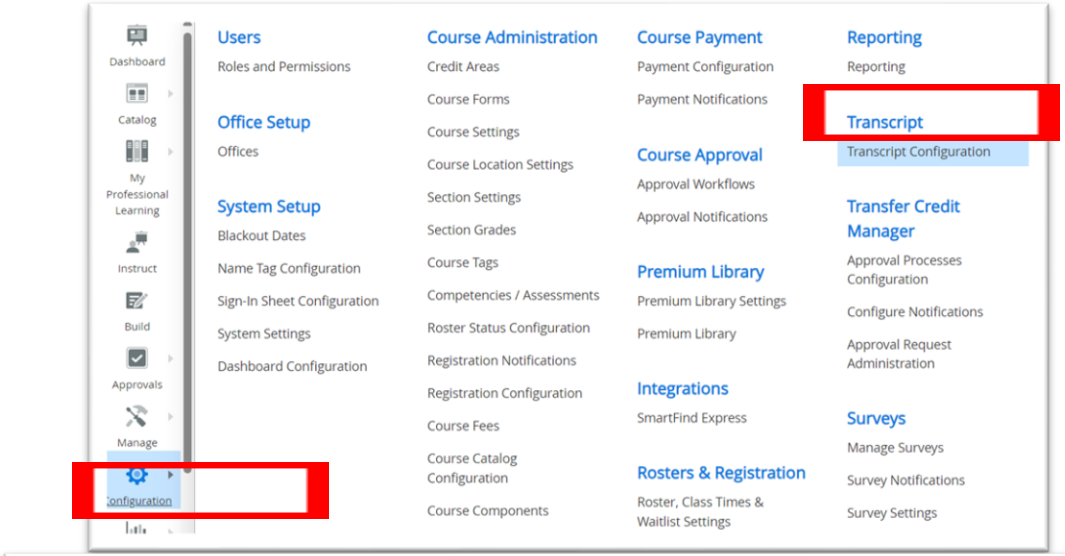
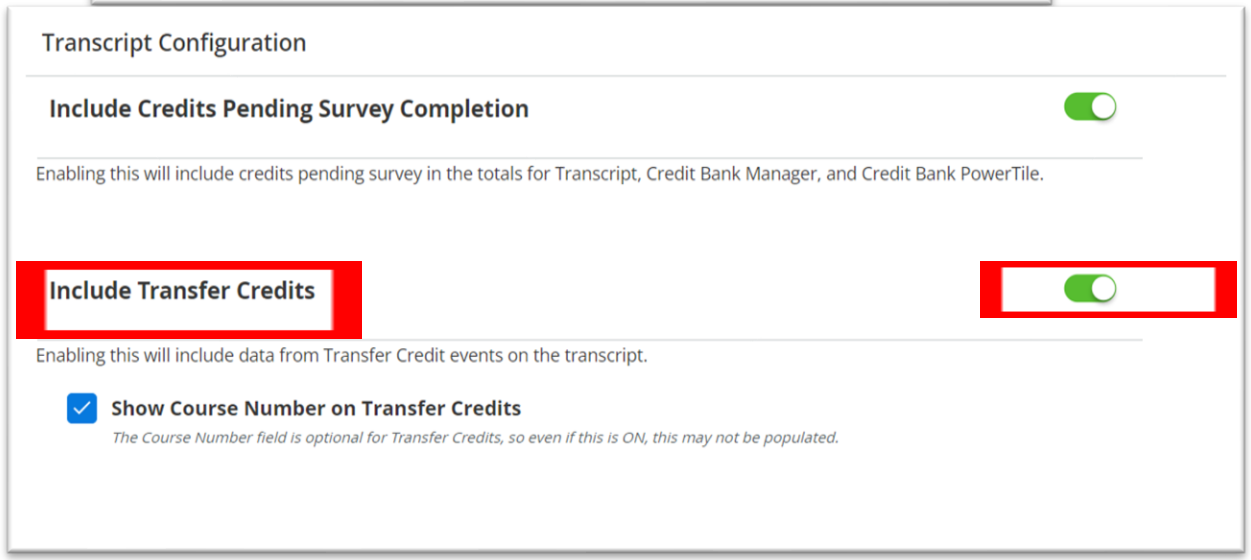
Adding External Credit Requests to Transcripts

- 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.





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Upcoming Talent PowerUp Meetings

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

- **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

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