

# Welcome to the Special Programs PowerSchool PowerUps!



# PowerUps

February 14, 2023

# Today's Agenda

- **New Features:**
  - PowerSchool Special Release Programs Version 22.11.1.0
  - PowerSchool Special Release Programs Version 22.11.2.0
- **Reporting How-To**
  - Create a Standard Report
  - Manage Report Properties/Privileges
  - Manage Report Securities
- **Reporting Utilities**
- **Reporting Demonstration How-To**
  - Profile Report
  - Document Report
- **Closing and Next Meeting Information**



# Meet the Team

## Robyn Skidmore

*Education Impact Consultant II*

- Retired educator - 26 years
  - Special Educator
  - Reading Specialist
- PowerSchool - 3 years
- Special Programs - 2 years



## Special Programs Support



- Our Support Team is on the call to assist with technical questions.
- Please submit your questions into the Q&A during presentation.
- There will be time for additional Q&A at end of the session.

# Platform Release Highlights

Version SPPL 22.11.1.0

Release Date: January 27, 2023

Version SPPL 22.11.2.0

February 17, 2023

# Resolved Issues

## Special Programs 22.11.1.0

### Digital Signature

- Resolved an issue where staff members were unable to opt out a signer after a document was sent for signatures.

## Special Programs 22.11.2.0

### Workflow Case Type

- Resolved an issue where previously, the Formula editor would not correctly insert the Student field recommendation into the Workflow Case Type setup dialog boxes

# New Features and Enhancements

## Special Programs 22.11.1.0

### Transfer Envelope

- If a district receives a document via transfer envelope but does not make it live, and the district sends the same student to another district in a transfer envelope, the receiving district can make the document live.
- Previously, the second receiving district in this scenario could not make a document live if the first receiving district had not already made it live.

### Digital Signature- Guided Signing

- Signers can now use the Guided Signing option to auto-navigate to the fields needing action.
- Signers can turn the option off or on at any time during the signing process without losing progress.
- There is additional confirmation step for signers using guided signing to acknowledge that they have read the document.
- Administrators can override guided signing from Edit Template Behavior Options.

### Digital Signature

- Required and optional fields are now denoted with tags on the fields.<sup>6</sup>


# New Features and Enhancements

## Special Programs 22.11.2.0

### Digital Signature

- Fixed issue where rows for staff would duplicate when users restart the Digital Signature process.

# Your Feedback is Important!



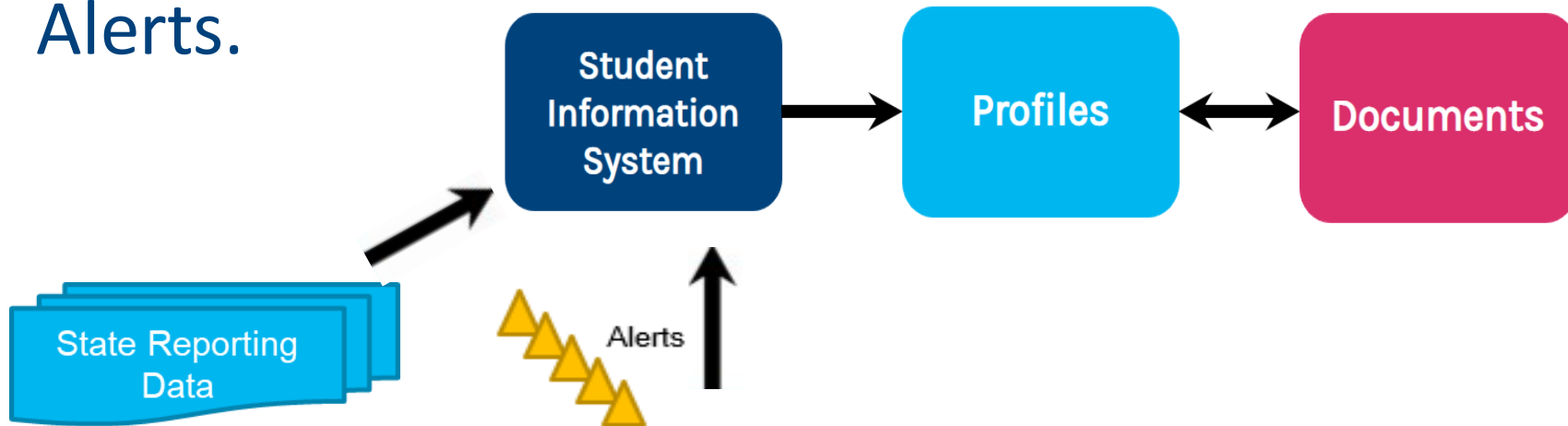
It would be great to have more time during the call to share with our colleagues and other districts.



# Reporting : Create a Standard Report

# Where does the Data come from?

- Data is imported from the SIS to Profiles.
- Data is exchanged between profiles and documents.
- Data is sent back to SIS as State Reporting Data and Alerts.



# Where does the Data come from?

## Tips:

- Pull data from Profile for a cleaner report
- Pull data from **finalized** documents
- Get to know your document templates and corresponding fields. Make note of information you need for report.
  - What field on what document does this data come from?



# Standard List Report Basics

## Gather Information:

1. Where do I need pull information from? (Source)
  - a. Student Profile
  - b. Student Documents (FINALIZED)
2. What information do I need to see? (Column Data)
  - a. Demographics?
  - b. Special Education information?
3. Who will see the report? (Security)
  - a. Public or Private (Depending on Security Permissions)

# Standard List Report Basics

**New List Report** ?  
*This type of report presents data in a row and column format with optional sorts and page breaks.*

**Report Name**

**Description** (optional)

**Ownership/Category** Public Report -> Optional Category: **None** ▼

**Type of Information** **Students** ▼

**Selection Criteria** Student Selection Formula [Quick Formula](#)

☐ Include Only 'Section 504 Plan' Students  
☐ Include Only 'English Language Learner' Students  
☐ Include Only 'Gifted and Talented' Students  
☐ Include Only 'Individualized Education Plan' Students  
☐ Include Only 'Not Exited' Students

**Accept** **Cancel**

**New List Report** ?  
*This type of report presents data in a row and column format with optional sorts and page breaks.*

**Report Name**

**Description** (optional)

**Ownership/Category** Public Report -> Optional Category: **None** ▼

**Type of Information** **Students > Documents...** ▼ **Section 504 - Plan** ▼

**Selection Criteria** 'Five04Plan' Document Selection Formula

☐ Include Only 'Section 504 Plan' Students  
☐ Include Only 'English Language Learner' Students  
☐ Include Only 'Gifted and Talented' Students  
☐ Include Only 'Individualized Education Plan' Students  
☐ Include Only 'Not Exited' Students  
☐ Final Documents Only  
☐ Active Documents Only  
☐ Include Only the Most Recent Document Per Student

**Section 504**  
Section 504 - Plan  
Meeting Participants  
Method of Contact  
Regular/Special Education & Related Aids/Services  
Mode and Date of Delivery  
Section 504 - Meeting Notice and Invitation  
Determination Notice Invited Other  
Determination Notice Invited Staff  
Eligible Letter  
Section 504 - Eligibility  
Eligible  
Method of Contact  
Plan Invitees - Other

**Accept** **Cancel**

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**Report Name:** Make unique

**Description:** Including a description helps other users identify and use the report if a Public report

**Ownership/Category:** Organize by adding to existing category, create a new category

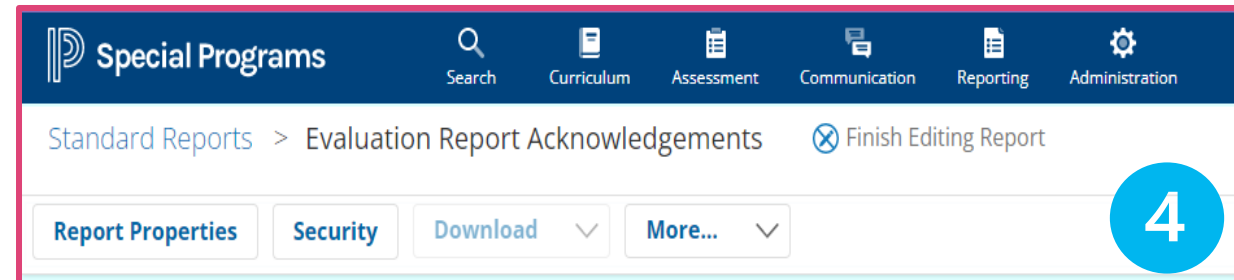
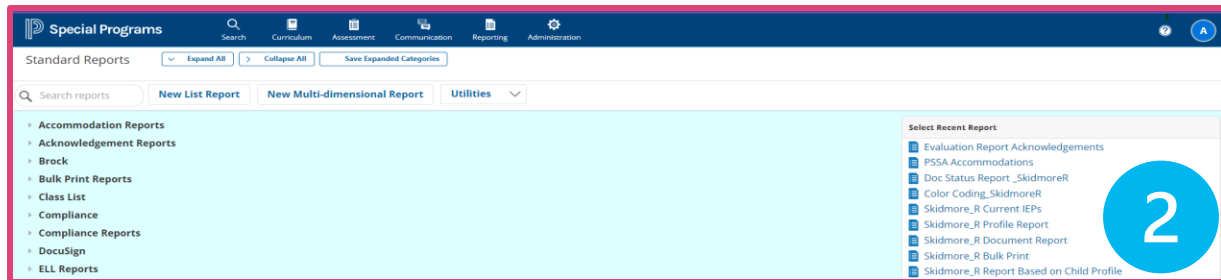
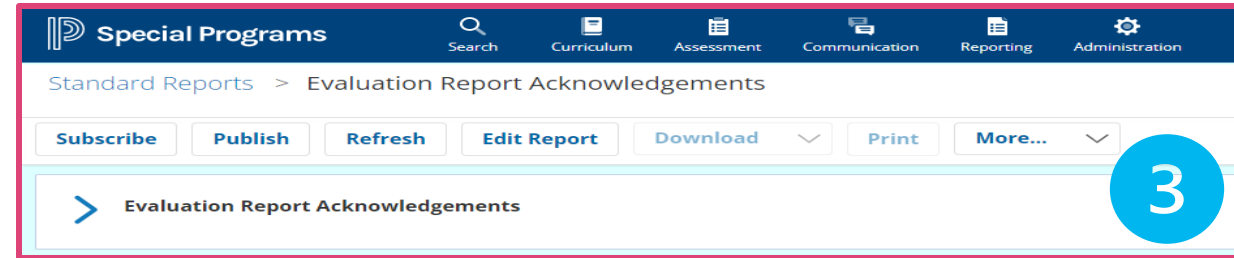
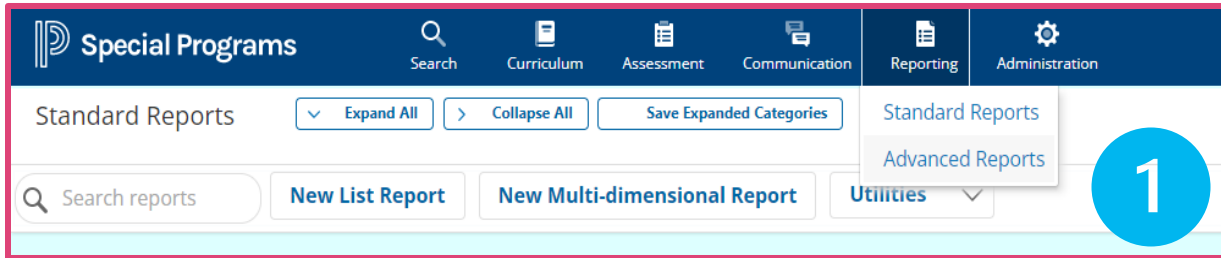
**Type of Information:** Profile or Document (Baseline or Child Template) ; Default is Student

**Selection Criteria:** Define formula for selecting records to appear.

**Reporting > Standard Report > List Report**

# Reporting : Manage Report Properties and Privileges

# Report Properties



1. Click **Reporting > Standard Reports**
2. Click on the Report Name to run the report.
3. Select **Edit Report**.
4. Select **Report Properties**.

# Report Properties

**Report Properties**

**Report Name**   
The report page header is also "Doc Status Report \_SkidmoreR".  
Set the page header to the new name? ☒

**Description**

**Type of Information** 'School Age IEP' Documents

**History** Created By: ADMIN (C:Robyn as Security Administrator)  
Created On: 12/14/2022 Wed, 03:06 PM  
Modified By: ADMIN (C:Robyn as Security Administrator)  
Modified On: 01/23/2023 Mon, 02:26 PM

**Ownership/Category** Public Report -> Optional Category:

**Data Refresh Options** ☒ Auto Refresh System-Wide Report View Overnight, Also At:   
Data can be as old as:  (Not applied to auto-refreshed system-wide report view)  
☒ Allow Manual Refreshing  
☐ Execute on Mirror Database

**Output Options** ☐ Allow Display Report as Calendar ( ☐ Default to Calendar View)  
☒ Allow Users to Render Report Directly On Their Home Page  
Highlight Report Name in Report Menus Using Color:   
☐ Disable Floating Column Headers

**Editing Control Options** ☐ Hide Data When Editing Report  
☐ Allow Users To Make Private Copies of Report

**Technical Notes**



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## Data Refresh Options

- Auto Refresh System-Wide Report View Overnight
- Allow Manual Refreshing

## Output Options

- Allow Display Report as Calendar
- Allow Users to Render Report Directly on Their Home Page

- Highlight Report Name

## Editing Control Options

- Hide Data When Editing Report
- Allow User to Make Private Copies of Report



# Report Properties



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- Include Inactive Students
- Final Documents Only
- Active Documents Only
- Include Only the Most Recent Document Per Student
- Allow User Filtering Based on Organizational Location

**Special Programs**

Search Curriculum Assessment Communication Reporting Administration

**Selection Formula for Report: Doc Status Report \_SkidmoreR**

Report Selection Formula: 'IEPGO' Document Selection Formula  
DocStatus <=> Final

Report Selection Description

**Selection Options**

☐ Include Only 'Section 504 Plan' Students  
☐ Include Only 'English Language Learner' Students  
☐ Include Only 'Gifted and Talented' Students  
☒ Include Only 'Individualized Education Plan' Students  
☐ Include Only 'Not Exited' Students  
☐ Include Inactive Students ( ☐ Only )  
☐ Final Documents Only  
☐ Active Documents Only  
☒ Include Only the Most Recent Document Per Student

☐ By Document Creation Date  
☐ By Document Finalization Date  
☒ Include Only the Most Recent Documents Within Selection Criteria  
☐ Include Only the Most Recent Documents Overall

☐ Allow User Filtering Based on Organizational Location  
☐ Notification Report: Show Row Count On Home Page  
☐ Always Filter to User Caseload  
☐ Enable Access Via User Caseload  
Maximum Rows to Retrieve: 10,000

**Report Parameters (advanced)** Number of Parameters: None

**Special Programs**

Search Curriculum Assessment Communication Reporting Administration

Robyn Skidmore Reports > Doc Status Report \_SkidmoreR Finish Editing Report

Report Properties Security Download More...

Use the insert +, edit, and delete X icons below to modify the report.

Doc Status Report \_SkidmoreR (13 Documents)

Document Selection Formula: DocStatus <=> Final ('Individualized Education Plan'; include only the most recent document per student within selection criteria)

Document Sort Value(s): None

Doc Status Report \_SkidmoreR

# Report Privileges

Special Programs

SearchCurriculumAssessmentCommunicationReportingAdministration

Security

Staff Security GroupsStudent/Parent SecuritySessionsAudit LogException Log

Expand GroupsFilter Groups by PrivilegeSecurity SettingsNew Security GroupPrintMore...

504 Specialist

Building Administrators

District Administrators

ELL Specialist

GenEd Teacher

• System-wide administrators can manage membership.  
• Location-wide administrators can manage membership.

Special Programs

SearchCurriculumAssessmentCommunicationReportingAdministration

Staff Security Groups > 504 Specialist

Properties/PrivilegesMembersDocument Templates

Edit Properties/PrivilegesMore...

504 Specialist - Properties/Privileges

Privilege Set	(+ ) Granted (- ) Denied	
Student Curriculum	(+) View Curriculum Outline	(+) View Assessment Definitions
	(+) View Question Items	(+) Edit Curriculum Outline
Special Access	(+) Access My Classes	(+) Edit My Standard Caseload
	(+) Access My Future Classes	(+) Edit My Case Manager Caseload
	(+) Access My Caseload	
Student Assessment	(+) Assess My Classes	(+) Publish Assessment Data
	(+) Use Online Assessment	(+) Create Public Screening Groups
	(+) View Assessment Administrations (Location-Wide)	(+) Access Assessment History for Viewable Profiles
	(+) Admin Assessment Administrations (Location-Wide)	
Progress Monitoring Groups	(+) Create Progress Monitoring Groups for My Classes	(+) View Progress Monitoring Groups (Location-Wide)
Reports	(+) Create Private Standard Reports	(+) Share Private Reports
	(+) View Public Standard Reports	(+) Publish Shared Reports
	(+) Create Edit Public Standard Reports	

Administration > Security > Select Security Group > Edit Properties/Privileges

# Report Privileges



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▼ Reports Privileges		
Create Private Standard Reports	Grant (+)	▼
View Public Standard Reports	Grant (+)	▼
Create Edit Public Standard Reports	n/a	▼
Admin Public Reports	n/a	▼
View Advanced Reports	n/a	▼
Process Unprocess Advanced Reports	n/a	▼
Share Private Reports	Grant (+)	▼
Publish Shared Reports	n/a	▼

- **Create** Private Standard Reports
- **View** Public Standard Reports
- **Create Edit** Public Standard Reports
- **Admin** Public Reports
- **View** Advanced Reports
- **Share** Private Reports
  - Allows users to share their private reports with specified Security groups.
- **Publish** Shared Reports
  - Allow users to share their private reports but also publish them to the home pages of other users.

# Reporting : Manage Report Security

# Report Security

The screenshot shows a web application interface for 'Special Programs'. At the top is a dark blue navigation bar with icons and labels for Search, Curriculum, Assessment, Communication, Reporting, and Administration. Below this is a light blue content area. A modal dialog box is open, titled 'Security for Public Report: Evaluation Report Acknowledgements'. Inside the dialog, it says 'Enable Access for:' followed by a list of roles with checkboxes. The roles are: 'All Security Groups Below' (unchecked), 'Building Administrators \*\*\*' (checked), 'District Administrators \*\*\*' (checked), 'GenEd Teacher' (unchecked), 'Gifted Specialist \*\*\*' (checked), and 'Special Education Specialist \*\*\*' (checked). To the right of the list are two buttons: 'Select All' and 'Select None'. At the bottom of the dialog is a note: '\*\*\* Have privileges to create/edit reports and therefore have access regardless.' and two buttons: 'Accept' and 'Cancel'.

**Special Programs**

Search Curriculum Assessment Communication Reporting Administration

**Security for Public Report: Evaluation Report Acknowledgements**

Enable Access for:

- ☐ All Security Groups Below
- ☒ Building Administrators \*\*\*
- ☒ District Administrators \*\*\*
- ☐ GenEd Teacher
- ☒ Gifted Specialist \*\*\*
- ☒ Special Education Specialist \*\*\*

Select All

Select None

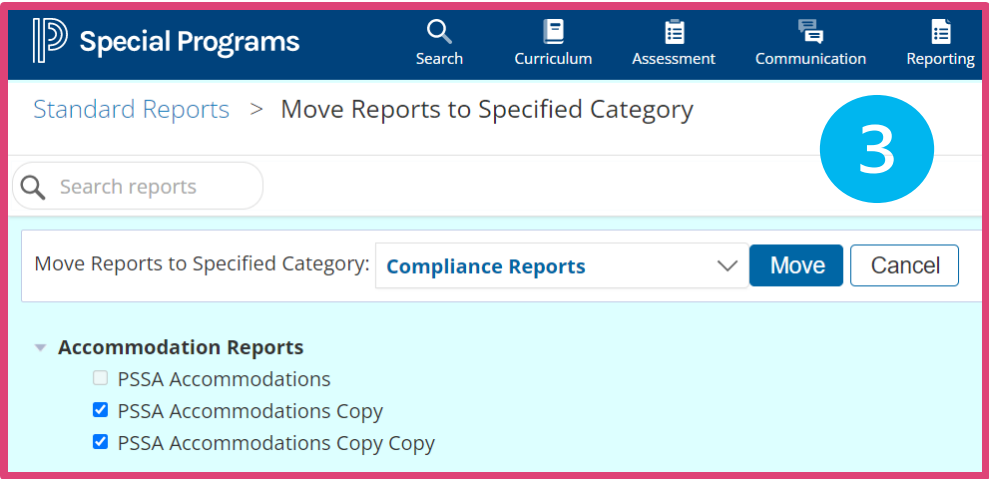
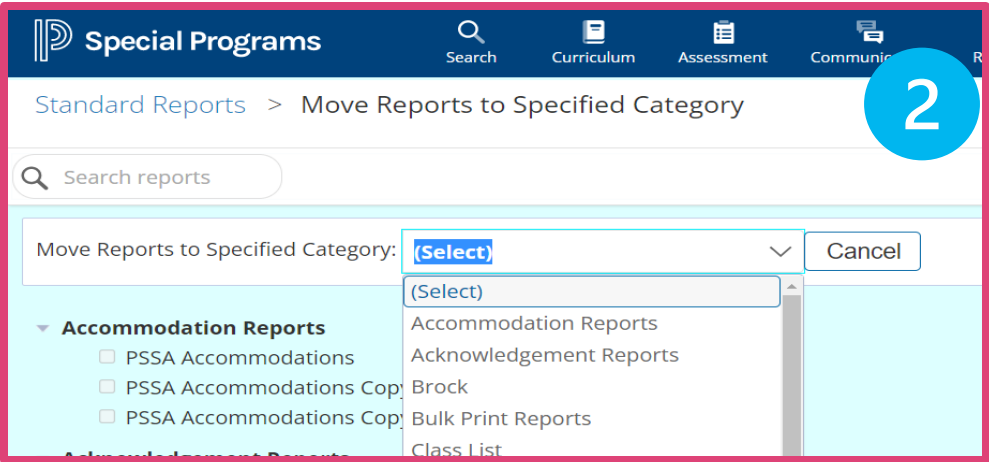
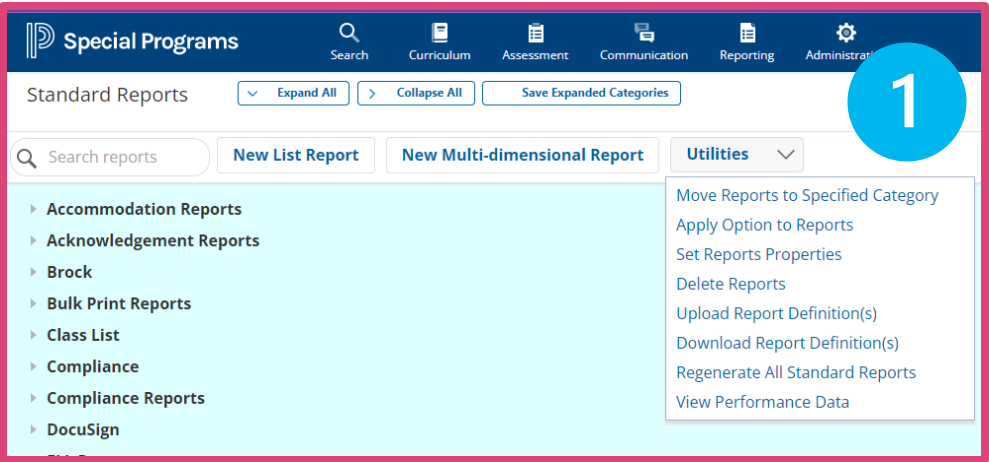
\*\*\* Have privileges to create/edit reports and therefore have access regardless.

Accept Cancel

**Reporting > Standard Reports > Select Report > Edit Report > Security**

# Reporting: Utilities

# Move Reports to Specified Category

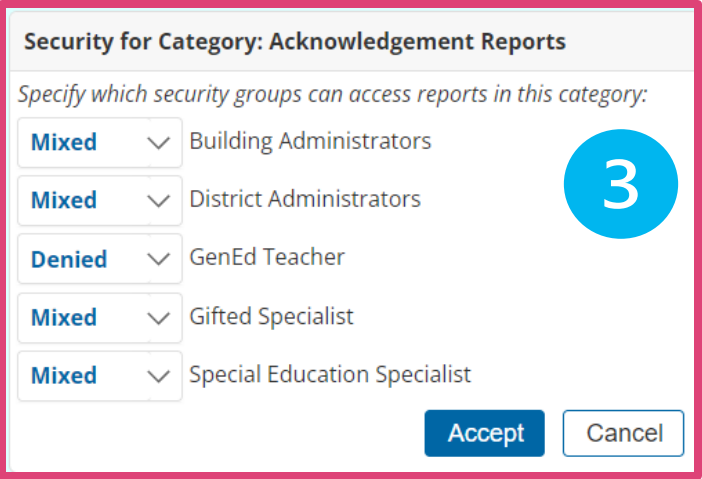
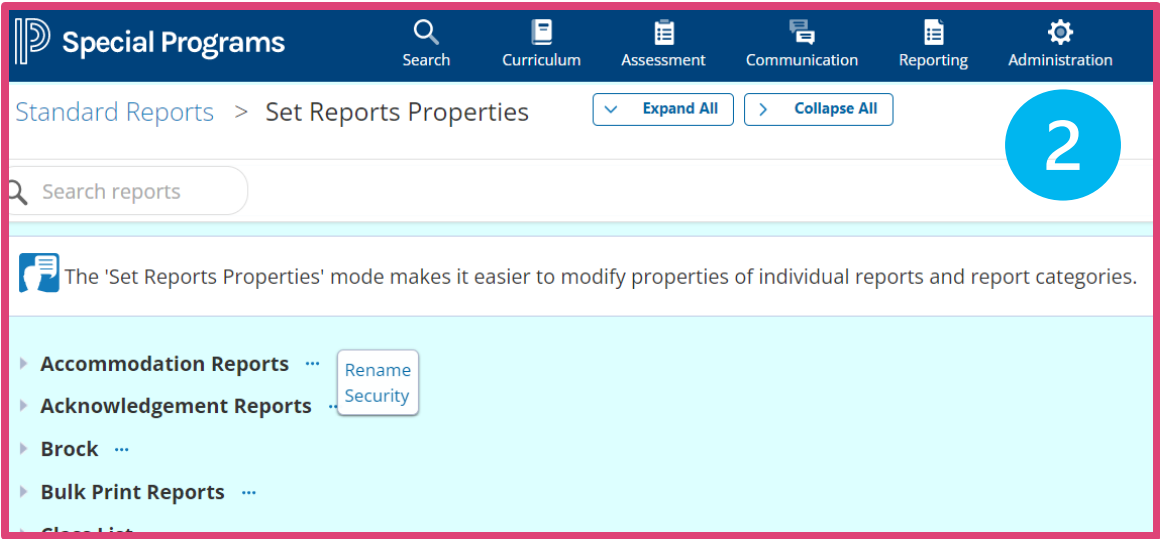
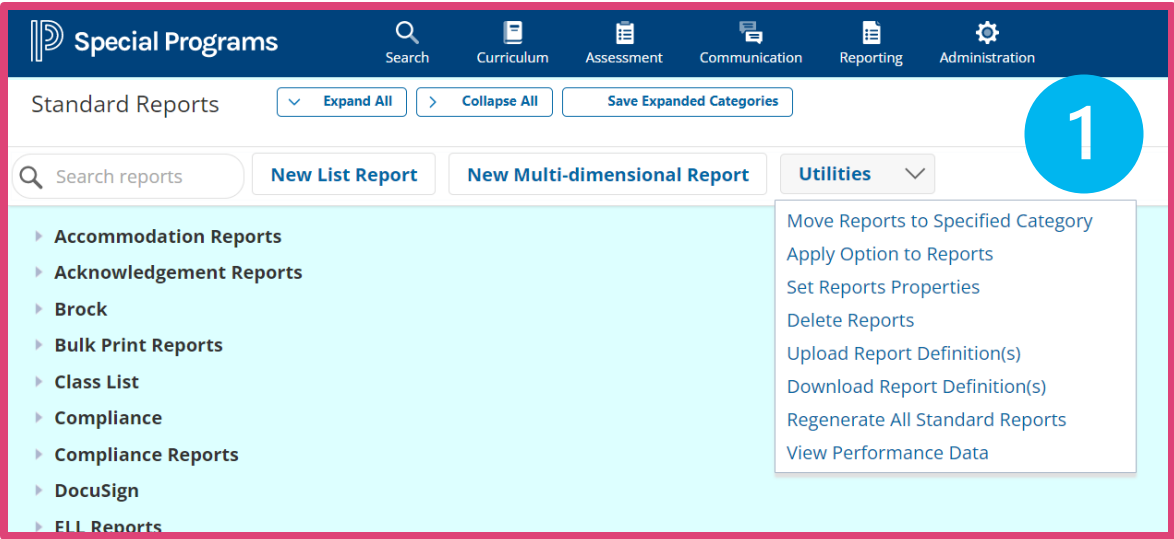


*Knowledge is Power*



**Reporting > Standard Reports > Utilities > Move Reports to Specified Category**

# Set Reports Properties



*Knowledge is Power*

Reporting > Standard Reports > Utilities > Set Report Properties



# Delete Reports

Special Programs

SearchCurriculumAssessmentCommunicationReportingAdministration

Standard ReportsExpand AllCollapse AllSave Expanded Categories

Search reportsNew List ReportNew Multi-dimensional ReportUtilities

Accommodation Reports

Acknowledgement Reports

Brock

Bulk Print Reports

Class List

Compliance

Compliance Reports

DocuSign

ELL Reports

eSPEXport

Move Reports to Specified Category

Apply Option to Reports

Set Reports Properties

Delete Reports

Upload Report Definition(s)

Download Report Definition(s)

Regenerate All Standard Reports

View Performance Data

1

Special Programs

SearchCurriculumAssessmentCommunicationReporting

Standard Reports > Delete ReportsExpand AllCollapse All

Search reports

Mark the checkboxes next to the reports you want to delete, scroll to the bottom and click the 'Delete' button

Find Reports Not Used

Accommodation Reports

PSSA Accommodations

☒ PSSA Accommodations Copy

PSSA Accommodations Copy Copy

Acknowledgement Reports

☒ Evaluation Report Acknowledgements

School Age IEP Acknowledgements

School Age IEP Acknowledgements Brock

2

Public Student Reports

Public District Reports

Public Location Reports

Public Staff Reports

Public Document Reports

3

Delete Marked Reports

Cancel



Knowledge is Power

Reporting > Standard Reports > Utilities > Delete Reports

# Delete Reports

Special Programs

SearchCurriculumAssessmentCommunication

Robyn Skidmore Reports > Doc Status Report \_SkidmoreR

SubscribePublishRefreshEdit ReportDownloadPrint

> Doc Status Report \_SkidmoreR

Special Programs

SearchCurriculumAssessmentCommunicationReporting

Robyn Skidmore Reports > Doc Status Report \_SkidmoreR Finish Editing Report

Report PropertiesSecurityDownloadMore...

Use the insert + , edit and delete × icons below to modify the report

Doc Status Report \_SkidmoreR (13 Documents)

Document Selection Formula: DocStatus <> Final ('

Add Row Colorization Column

Regenerate Report

Translate Report Layout

Delete Report

Special Programs

SearchCurriculumAssessmentCommunicationReporting

Delete Report: Doc Status Report \_SkidmoreR

Click 'Delete' to confirm the deletion of the report: Doc Status Report \_SkidmoreR

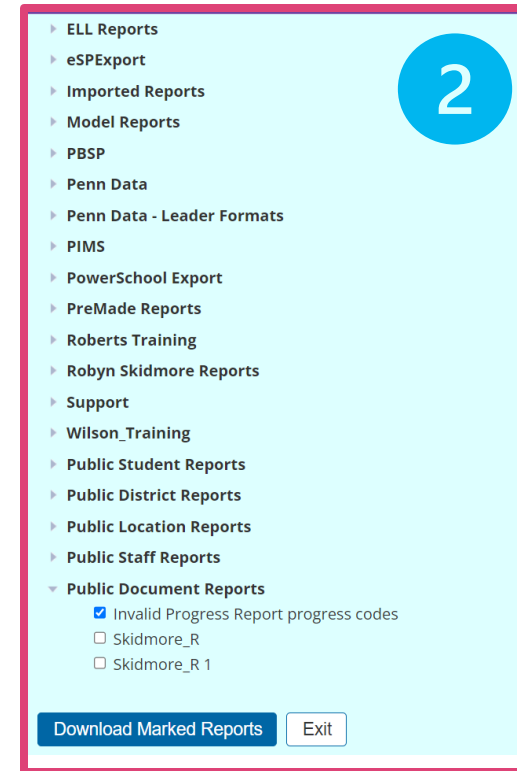
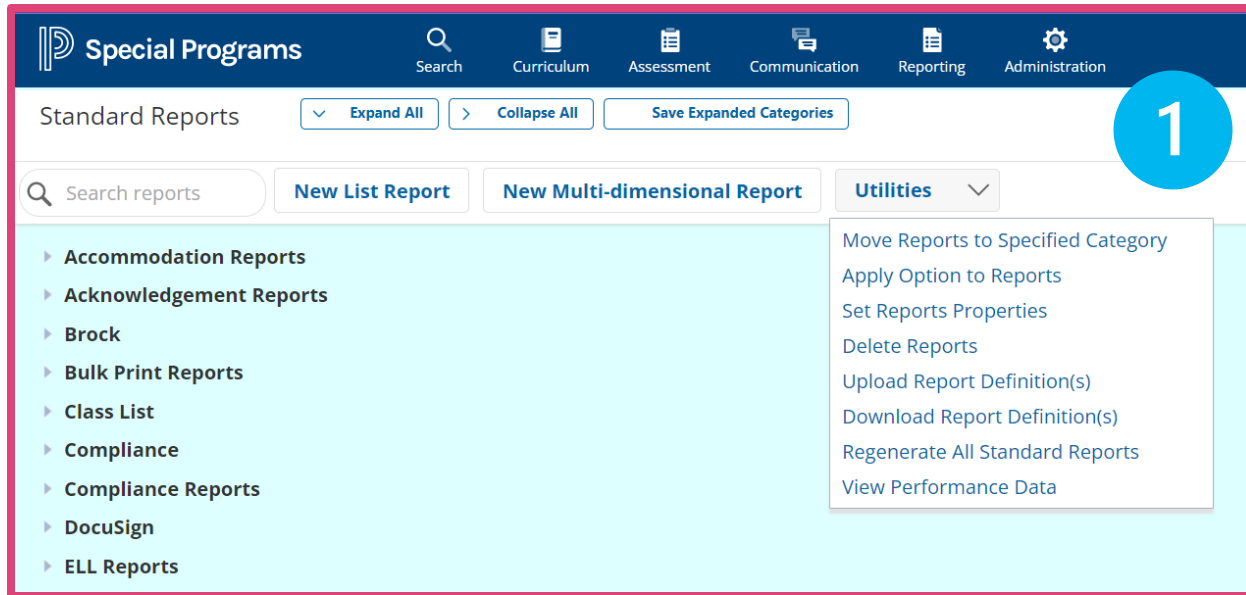
DeleteCancel



Knowledge is Power

Reporting > Standard Reports

# Download Report Definitions

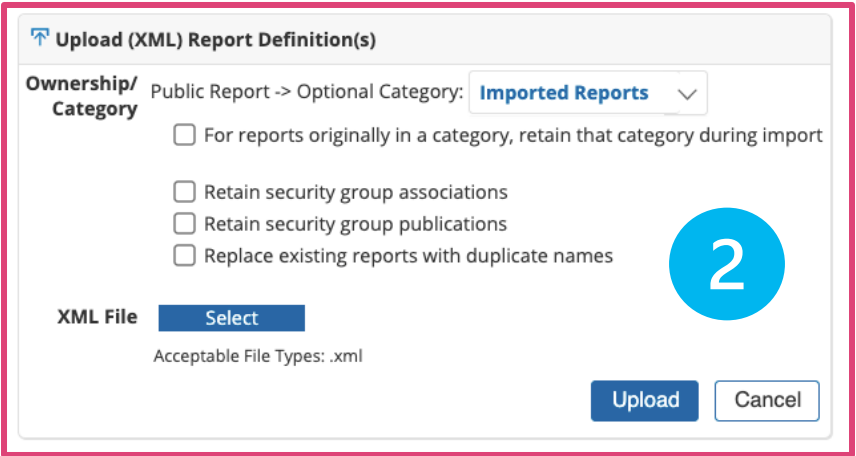
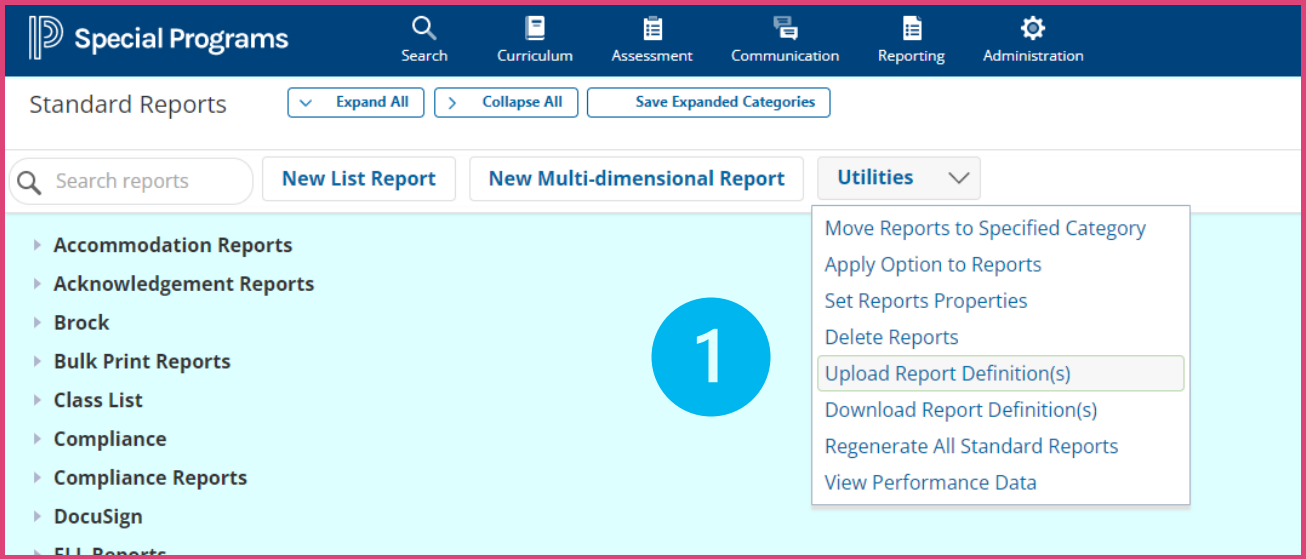


*Knowledge is Power*



**Reporting > Standard Reports > Utilities > Download Report Definitions**

# Upload Report Definitions



*Knowledge is Power*

Reporting > Standard Reports > Utilities > Upload Report Definitions

# Copy Reports

Special Programs

SearchCurriculumAssessmentCommunicationReportingAdministration

Robyn Skidmore Reports > Doc Status Report \_SkidmoreR

SubscribePublishRefreshEdit ReportDownloadPrintMore...

Doc Status Report \_SkidmoreR

1

Doc Status Report

ID	Last Name	First Name	Status
546902	Alvarado	Naori	Draft

Send Message with Report

Copy Report

Bulk-Print Setup

Bulk-Print Selected Documents

Set Documents as Active

View Audit Log

Enter Documentation Mode

Special Programs

SearchCurriculumAssessmentCommunicationReportingAdministration

Copy Report: Doc Status Report \_SkidmoreR

Name of new copy

Doc Status Report \_SkidmoreR Copy

Ownership/category of new copy

Public Report -> Optional Category: Robyn Skidmore Reports

Security

☐ Copy Security Group Associations

2

Accept

Cancel

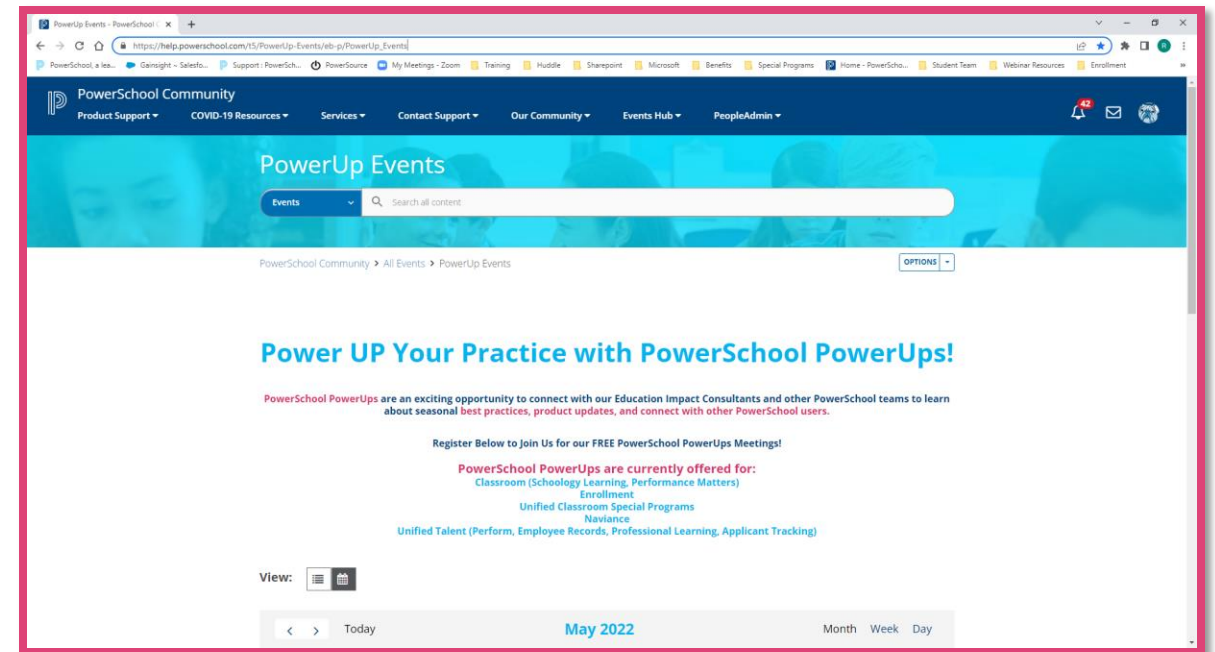
Reporting > Standard Reports > More > Copy Report



# Reporting Demonstration

# PowerSchool PowerUp Events Page

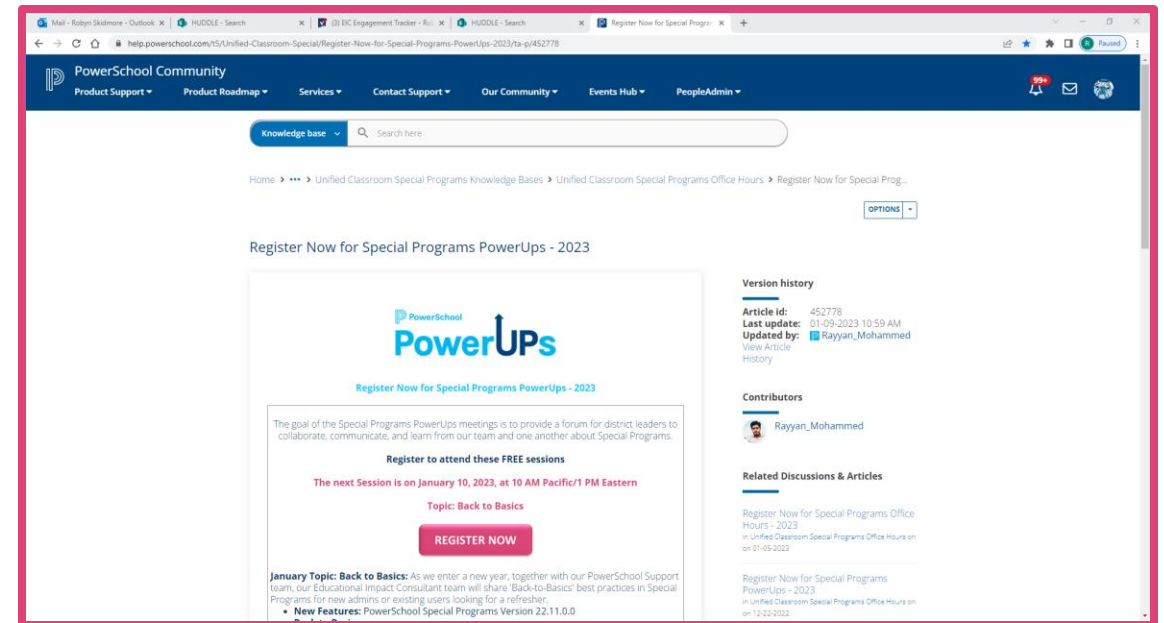
- Register for any upcoming PowerSchool PowerUp Events!
  - *Events Hub > All Events > PowerUp Events*
- PowerUps are currently offered for:
  - Classroom (Schoology & Performance Matters)
  - Unified Classroom Special Programs
  - Naviance
  - Enrollment
  - Talent (Professional Learning, Applicant Tracking, Records and Onboarding, Perform)
  - Unified Insights



# Special Programs PowerUps in PowerSchool Community

## PowerSchool Special Programs Community Page

- Find resources shared by EICs
- View updates
- Access Recordings
- Register for PowerSchool Special Programs PowerUp events






# Unified Classroom Special Programs Office Hours

## Register for upcoming Office Hours Events!

- *Events Hub > All Events > Unified Classroom Special Programs Events*
- Join us to:
  - Connect with PowerSchool experts and peers
  - Find the solutions to your pain points
  - Learn some insider tips for using Special Programs
  - Receive answers to your questions in real-time through our live Q&A forum



### Office Hours

Register Now for Special Programs Office Hours 2023

Dear Valued Customers,

Connect with PowerSchool Support experts and peers and find solutions to your pain points. During these **hour-long sessions**, you'll learn some insider tips about using the Performance Matters Assessment. In addition, you can ask your questions through a **live Q&A forum** with our Support experts

**Register to attend these FREE sessions.**

**The first session is on January 18, 2023**

**Topic - Back to Basics**

**REGISTER NOW**

**Topics:**

- January 18th - **Back to Basics**
- February 15th - **Reporting Basics**
- March 15th - **Digital Signature**

As always, we will email the recording to all registrants and post the recording on the PowerSchool Community, once the session is complete.

We look forward to connecting with you soon

# Next Steps and Additional Resources

# Special Programs 2023 PowerUp Events and Office Hours

**March 14:** *Special Programs PowerUp*

**March 15 :** *Office Hours*

**Topic:** *Digital Signature*

**April 11:** *Special Programs PowerUp*

**April 12:** *Office Hours*

**Topic:** TBA

**May 9:** *Special Programs PowerUp*

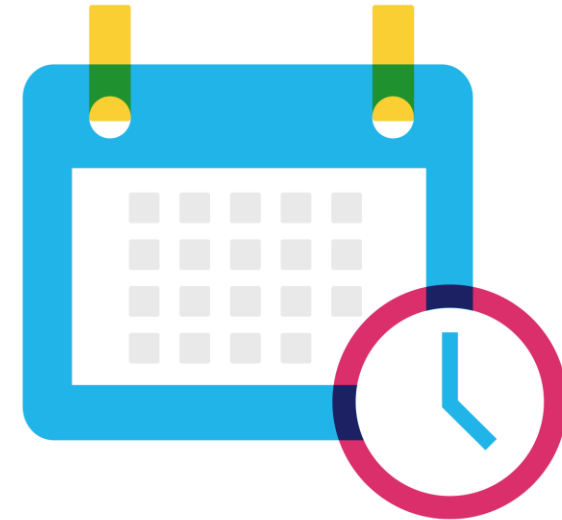
**May 10:** *Office Hours*

**Topic:** TBA

**June 13:** *Special Programs PowerUp*

**June 14** *Special Programs Office Hours*

**Topic:** TBA



# Please Share Your Feedback!

- You will be asked to take a **short survey** when leaving the Zoom Meeting
- Help us help you – We value **your feedback** and use it to create future sessions



# Next Steps

- **Connect with colleagues** in PowerSchool Community page.
- **Updates will be shared by EICs** via in the PowerSchool Community Page.
- **Monthly email reminder** to join our next PowerUp Meeting.
- **Register for Upcoming PowerUps Today!**





# Become a PowerSchool Champion!

PowerSchool Champions connect, share and learn with others in solution-specific communities. We share our expertise as teachers, administrators, technology directors, or talent leaders. We engage in interesting activities to accumulate points, collect badges, and earn fantastic rewards. Joining the Champions community provides:

- **Community** • Join an exclusive group of school and district leaders
- **Engagement** • Share your expertise and give product feedback
- **Opportunity** • Earn rewards like swag, cool opportunities, event attendance, and more
- **Growth** • Advance professionally, build your PLN and increase your Ambassador Program eligibility

Visit [powerschool.com/champions](https://powerschool.com/champions) and SIGN UP or email [champions@powerschool.com](mailto:champions@powerschool.com) if you have questions!



 PowerSchool

**CHAMPIONS**



PowerSchool

# Thank you for your Partnership!



# Resources

PowerSchool Community	In-Platform User Help
<a href="#">PowerSchool Community</a>	<a href="#">Communications and Calendar</a>
<a href="#">Special Programs PowerUps 2023 Series Registration</a>	<a href="#">Review and Acknowledge</a>
<a href="#">PowerUp Events (All Products)</a>	<a href="#">Digital Signature Details</a>
<a href="#">Technical Contacts</a>	<a href="#">Reporting</a>
<a href="#">Contact Support</a>	
<a href="#">Case Portal Priority Definitions</a>	
<a href="#">Subscriptions and Notifications</a>	

# Resources

Special Programs Release Notes	Office Hours	Special Programs PowerUps
<a href="#">Platform Release 22.11.0.0</a> Release date: December 16, 2022	<a href="#">Office Hours 2020 Series</a>	<a href="#">Special Programs PowerUps 2022 Series</a>
<a href="#">Platform Release 22.11.1.0</a> Release date: January 27, 2023	<a href="#">Office Hours 2021 Series</a>	
<a href="#">Platform Release: 22.11.2.0</a> Release date: February 17, 2023	<a href="#">Office Hours 2022 Series</a>	

# Resources: Reporting

Reporting		
<a href="#">Office Hours   PowerSchool Special Programs - July 16, 2020</a>	<a href="#">Reporting main screen navigation basics</a>	<a href="#">Creating Reports When Using the "Review &amp; Acknowledge" Feature</a>
<a href="#">Office Hours Recording: Reports - June 24, 2021</a>	<a href="#">Report creation basics in Special Programs</a>	<a href="#">How-To: Reporting - Example Document Report</a>
<a href="#">Office Hours Recording: Reports - Part 2 - July 29, 2021</a>	<a href="#">Profile Reports in Special Programs</a>	
<a href="#">PowerSchool Special Programs PowerUp: Reporting January</a>	<a href="#">Creating Document Reports in Special Programs</a>	
<a href="#">Finding profile field names</a>	<a href="#">Editing Report columns</a>	
<a href="#">Finding Field and Template Names for Report Use</a>	<a href="#">Editing the report properties and selection formula</a>	
<a href="#">How to sort a report</a>	<a href="#">Working With Date Fields in the Report Selection Criteria Formula</a>	