Welcome to the Special Programs PowerSchool PowerUp!

PowerSchool

Powering Brighter Futures

April 17 , 2024

Special Programs 2024 PowerUp and Office Hours Events

PowerUp Dates *Scheduled for 2PM EST	Topic	Office Hours Dates
January	End User Basics: Working with the Home Page	
February 21	Understanding Student Documents in Special Programs	
March 20	Reporting 102	
April 17	Digital Signature	April 25
May 9	Security	May 16
June 5	Easy Edit and EOY	June 13
July		
August 14	Workflow Case Management	August 22
September 11	Translations	September 19
October 16	Integrations	October 24
November 14	Utilities/Transfers	November 21
December		

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Special Programs PowerUps Team

Robyn Skidmore

Senior Educational Impa
Consultant (EIC)

- Retired educator- 26 years in public education
- SPED/ Inclusion teacher
- Master of Special Education
- Endorsed Reading Specialist

Support Team on 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 meeting if time allows.

Please use the survey at the end of the call for more technical questions to be addressed at the upcoming Office Hours.

Today's Agenda

- Welcome and Agenda
- Platform Release: SPPL 23.11.5.0
  - Release Date: April 19, 2024
- Digital Signature Personas
  - Admin
  - Staff
  - Parent/Guardian
- Digital Signature Management
- Digital Signature Reporting
- Closing and Next Steps

Platform Release Highlights

Version SPPL 23.11.5.0
Release Date: April 19 , 2024

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Digital Signature Auto-Acceptance Feature

- Auto-Acceptance of documents if at least one signature is present (based on age > 150 days)
- Auto-Void of documents if no signatures are present (based on age > 150 days)
- Process runs daily (every 24 hours)
- Summary/reminder emails & notifications weekly
  - contain a list of documents in the following ranges
    - less then 90 days or less , 60 days or less , 30 days or less, 14 days or less and 7 days or less.

- 'Controlled Availability' initially
- Need pilot volunteer testers
- Email lori.ivey@powerschool.com if interested in participating

Digital Signature

Digital Signature: What is it?

Ease the burden of manually obtaining required signatures.

- Digital Signature is configured specifically for each model.
- This means that availability of document templates within a model will differ per state/province.

Translations Capabilities

Mobile Accessible

Convenient for Staff and Parent/Guardians

Reportable Fields

Font stylized text or drawn signature available

Intuitive workflows

Save time without relying on manual processes

Signatures can be obtained via email and/or SignNow

Full dashboard to view signature statuses and complete actions in mass

Legally Compliant

Automatic, Built-In messaging

Single platform

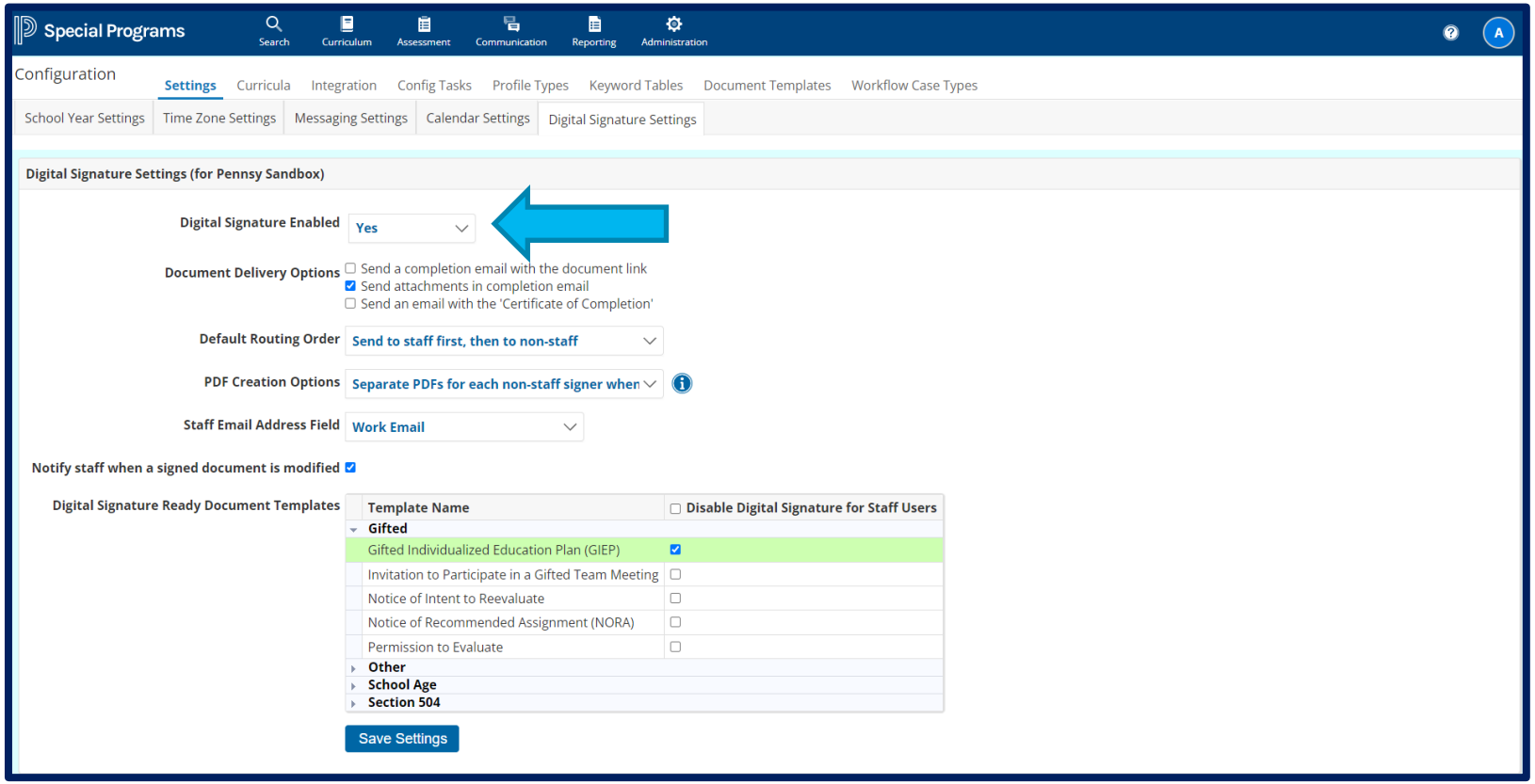
Before You Begin: How Does It Work?

- ✓ **Need a License and an Account**
- ✓ Deployment with **Document Templates ready** for your State or Province model.
  - After log-in to Special Programs, go to **?** > **State Resources** to view documents configured for Digital Signature.
- ✓ Setup Digital Signature **Account Settings.**
- ✓ Setup the **Document Templates** for Digital Signature.
- ✓ **Setup Staff Security Roles** on Document Templates.
  - All staff with read and write access can send documents.
  - Parents/Guardians must be set to “Receives Mail.”
- ✓ **Identify** who will sign the document
  - Have **valid email addresses** for staff, parent or guardian.

Digital Signature: Admin User

How-to: Configure Digital Signature

Administration > Configuration > Settings > Digital Signature Settings

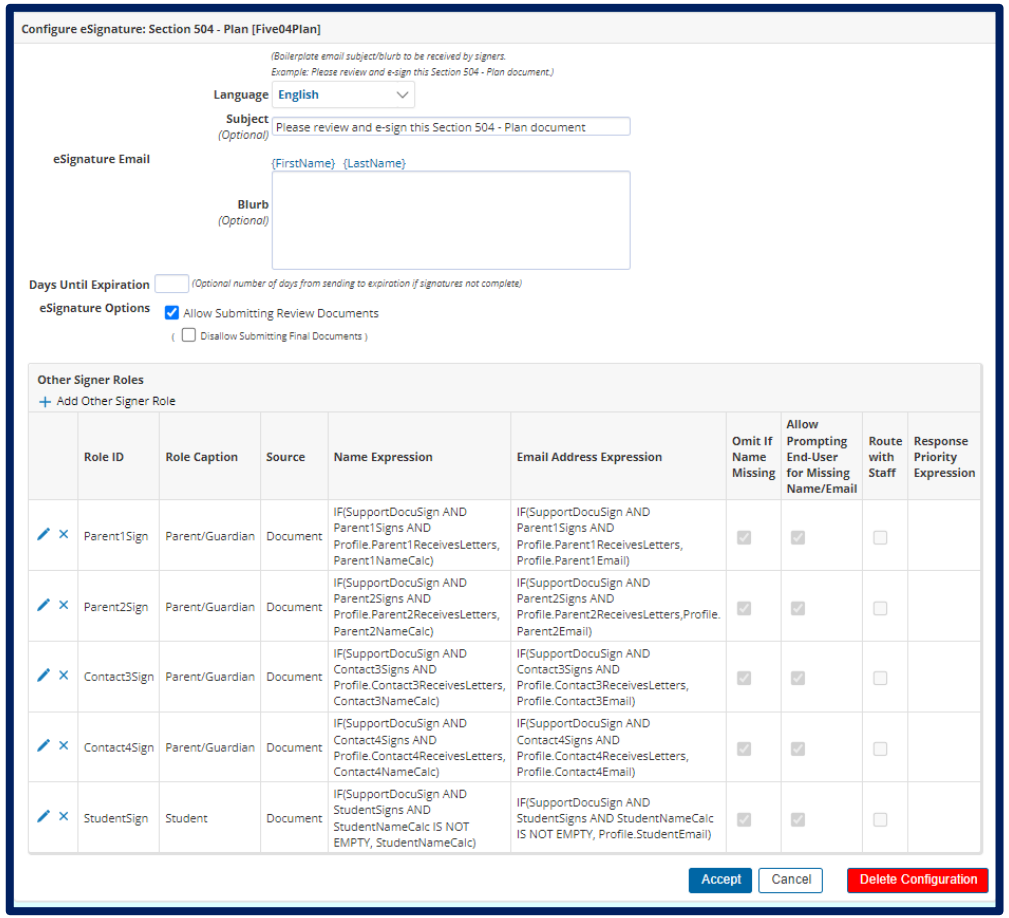


If a document template is not listed, the document cannot be sent via digital signature.

Be aware of documents with different signing requirements.

How-to: Configure Document Template

Administration > Configuration > Document Templates > Select Document > More > Configure eSignature



Configure eSignature: Section 504 - Plan [Five04Plan]

(Boilerplate email subject/blurb to be received by signers.
Example: Please review and e-sign this Section 504 - Plan document.)

Language: English

Subject (Optional): Please review and e-sign this Section 504 - Plan document

eSignature Email: {FirstName} {LastName}

Blurb (Optional):

Days Until Expiration: (Optional number of days from sending to expiration if signatures not complete)

eSignature Options: Allow Submitting Review Documents

(Disallow Submitting Final Documents)

Other Signer Roles

+ Add Other Signer Role

	Role ID	Role Caption	Source	Name Expression	Email Address Expression	Omit If Name Missing	Allow Prompting End-User for Missing Name/Email	Route with Staff	Response Priority Expression
	Parent1Sign	Parent/Guardian	Document	IF(SupportDocuSign AND Parent1Signs AND Profile.Parent1ReceivesLetters, Parent1NameCalc)	IF(SupportDocuSign AND Parent1Signs AND Profile.Parent1ReceivesLetters, Profile.Parent1Email)	☑	☑	☐	
	Parent2Sign	Parent/Guardian	Document	IF(SupportDocuSign AND Parent2Signs AND Profile.Parent2ReceivesLetters, Parent2NameCalc)	IF(SupportDocuSign AND Parent2Signs AND Profile.Parent2ReceivesLetters,Profile.Parent2Email)	☑	☑	☐	
	Contact3Sign	Parent/Guardian	Document	IF(SupportDocuSign AND Contact3Signs AND Profile.Contact3ReceivesLetters, Contact3NameCalc)	IF(SupportDocuSign AND Contact3Signs AND Profile.Contact3ReceivesLetters, Profile.Contact3Email)	☑	☑	☐	
	Contact4Sign	Parent/Guardian	Document	IF(SupportDocuSign AND Contact4Signs AND Profile.Contact4ReceivesLetters, Contact4NameCalc)	IF(SupportDocuSign AND Contact4Signs AND Profile.Contact4ReceivesLetters, Profile.Contact4Email)	☑	☑	☐	
	StudentSign	Student	Document	IF(SupportDocuSign AND StudentSigns AND StudentNameCalc IS NOT EMPTY, StudentNameCalc)	IF(SupportDocuSign AND StudentSigns AND StudentNameCalc IS NOT EMPTY, Profile.StudentEmail)	☑	☑	☐	

Accept | Cancel | Delete Configuration

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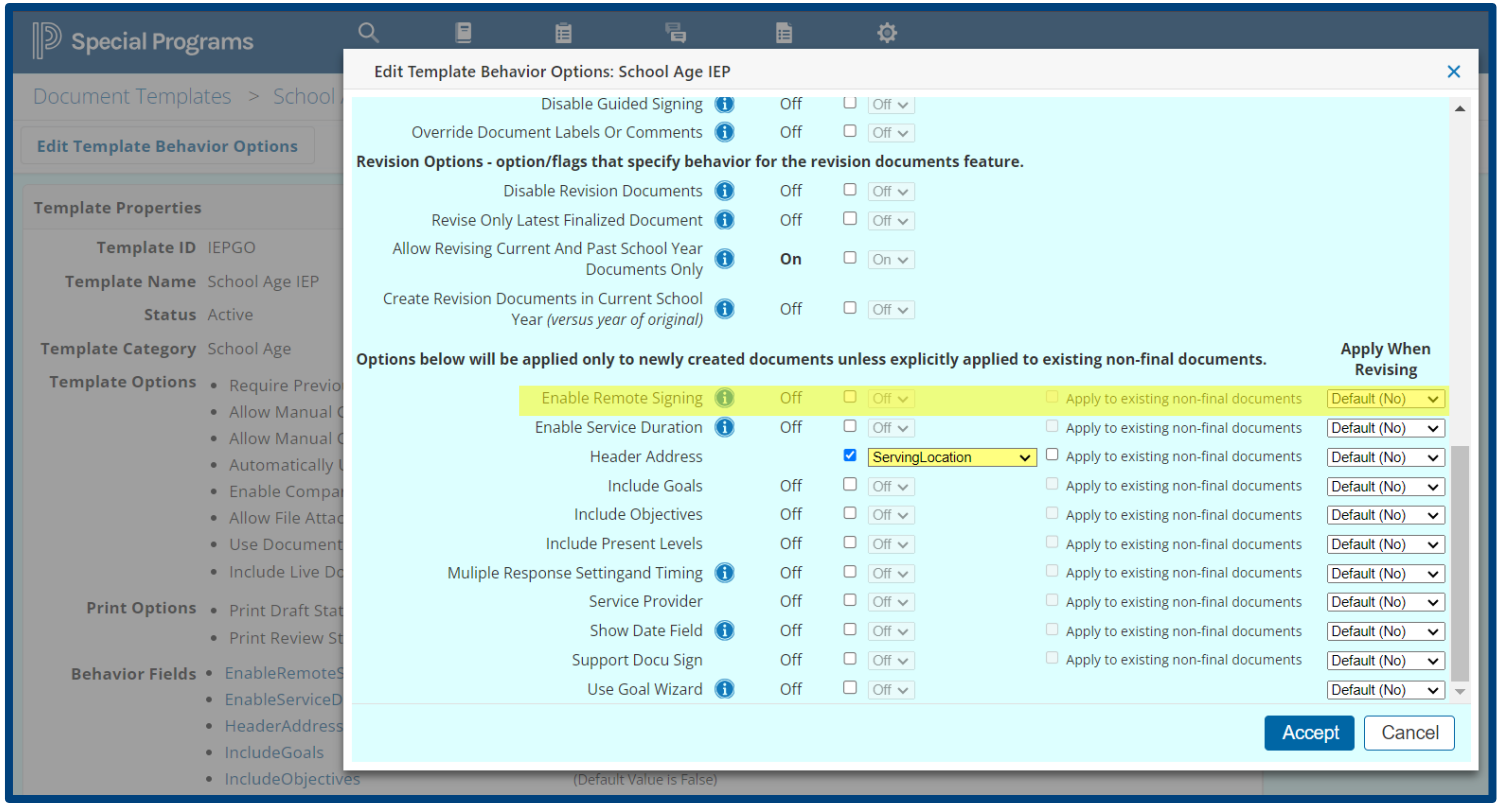
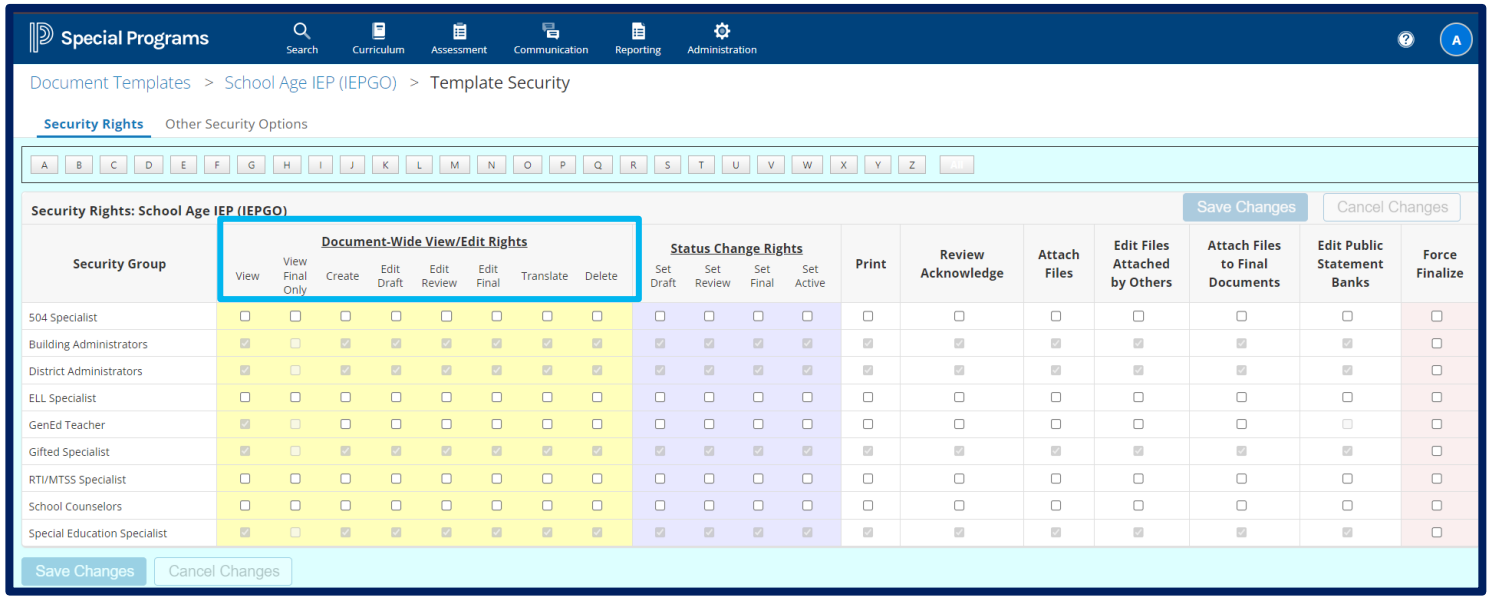
How-To: Enable/Disable Remote Signing

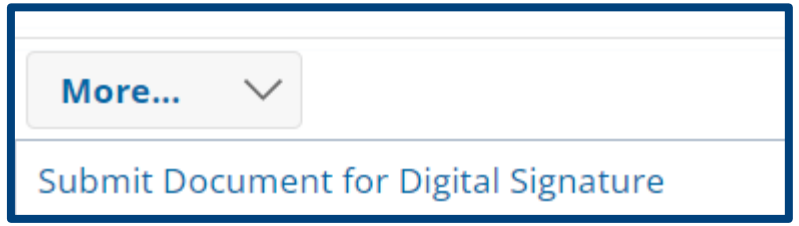


Administration > Configuration > Settings > Document Templates > Zoom icon (magnifying glass) > Properties > Edit Template Behavior Options > Enable Remote Signing

How-To: Digital Signature Security



Users submitting documents must have the permission to read and write to the document template.



Users with correct permissions will see Submit Document for Digital signature

Administration > Configuration > Settings > Document Templates > Select Document > Zoom icon (magnifying glass) > Security

Digital Signature: Staff Users

Staff Signers

Before submitting for Signature:

- Select **Sign Now** or **Sign through Email**
- Select **Routing Order** for signers
- Select **Opt-out**
- Select **Language** depending on the document language translations.

During Signing Process:

- **Accept** current signatures
- **Restart** Digital Signature request
- **Void** Digital Signature request (if all signers have not already signed)
- Can change to Sign Now during signing process
- **Refresh**

After Signing:

- Save as **Primary Signer**
- **Edit** signer's response
- Send **certificate of completion**
- Send **signed document**
- **Restart** Digital Signature Process
- **Refresh**
- If parent opts-out of electronic signature, signer's response can be entered, must provide reason.
- If signer declines to sign, staff can view reason for declining to sign and edit the signer's response.

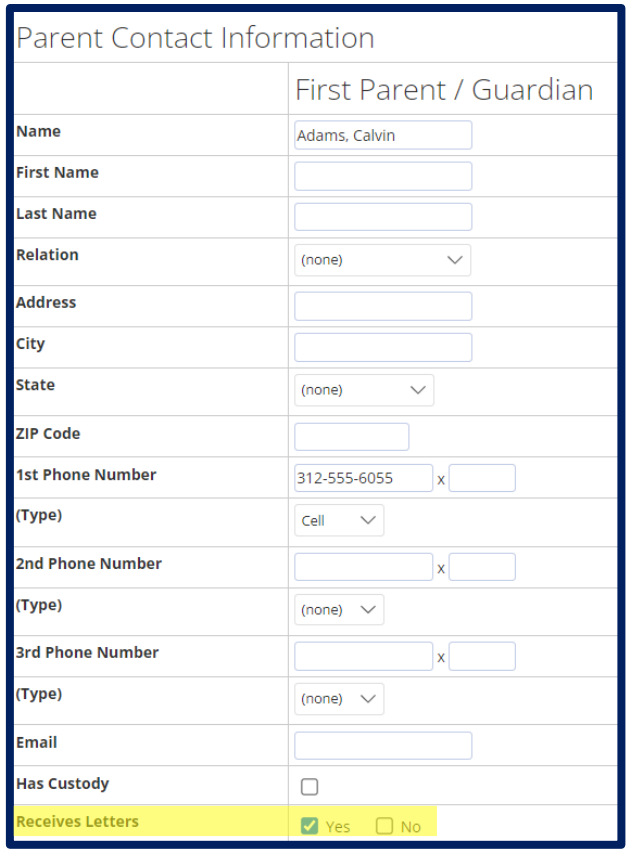
Good to Know Information

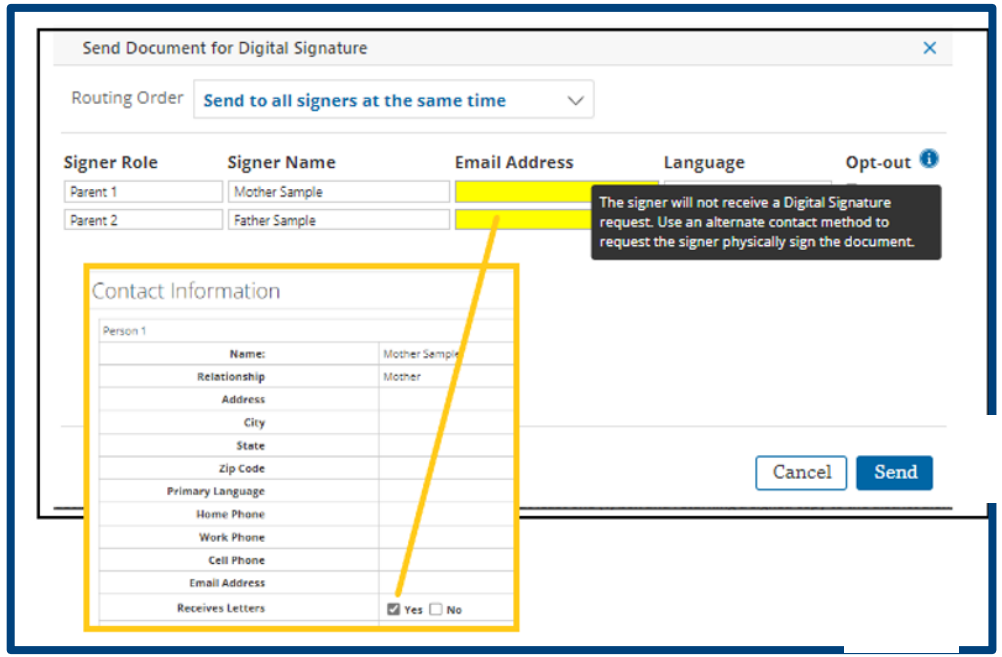
- **Documents** must be **configured** to use Digital Signature.
- In the document, **verify default signers** are correct.
- To add a new signature line, click **Add (+ icon)** or click in first empty signature field.
- If a signer fulfills multiple roles, create signature fields for these signers by role. Each role will have a separate entry when submitting for Digital Signature. However, the signer will receive only one email request, which will be displayed once in Digital Signature Details.

Signers who will receive the document for signing are established during document creation in the signers' section. ALWAYS VERIFY FOR ACCURACY.

Digital Signature: Receive Letters

- For a parent/guardian to receive communication (email), the **Receive Letters** box must be checked for all Parent/Guardians who need to receive communication.
- Go to **Student > Profile > Parent Contact Information > Receives Letters** (at bottom)

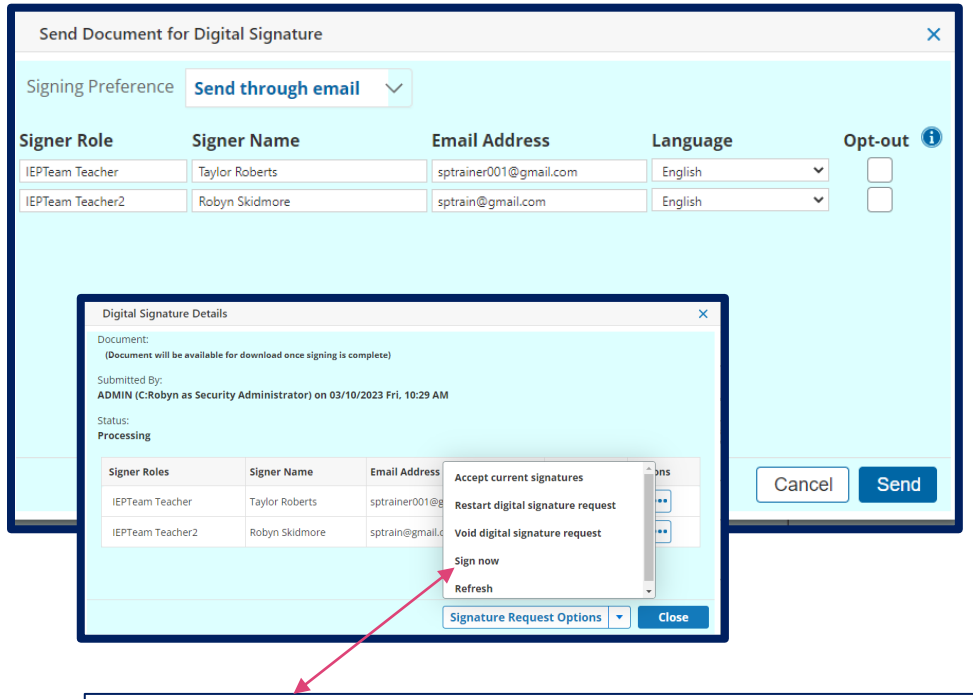




How-To: Submit Document for Signature

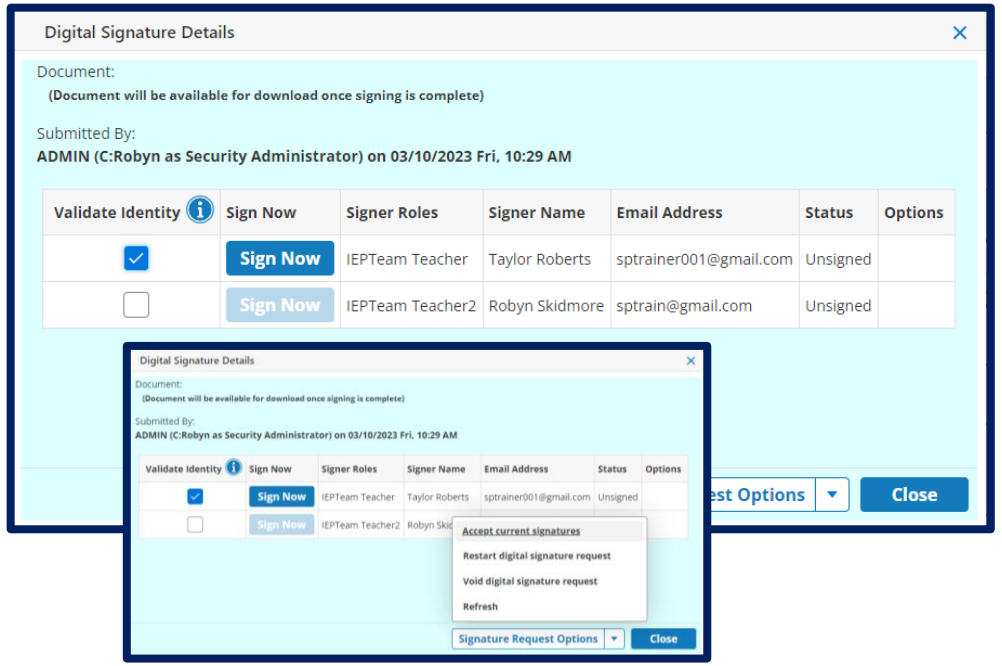
The initiator will receive an email when all signers have completed signing.

Email Request: Sign via email link



If the signing process is not complete, you can switch to using **Sign Now** after sending email requests.

Sign Now: Sign on device in the same room.



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How-To: Signing the Document

Step 1: **Create the Signature**

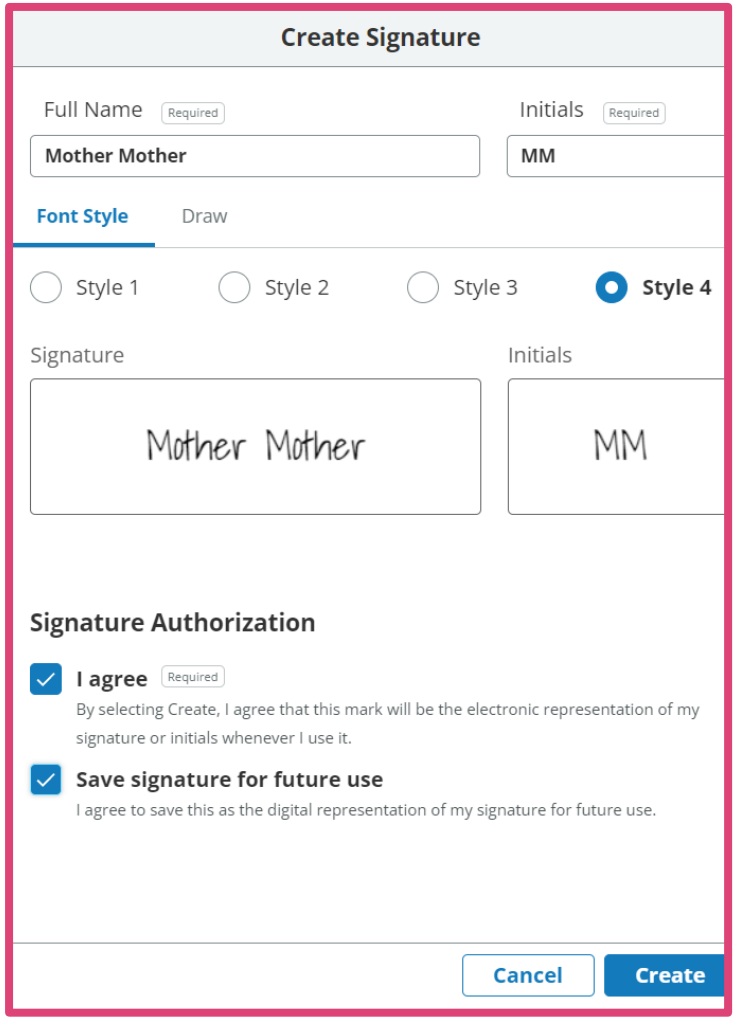
- ***This is not signing the document; only creation of signature used for document signing.***
- Create a **New signature** or **Use a saved signature.**
- Previously saved signatures can be edited.

Step 2: **Chose Signing Experience**

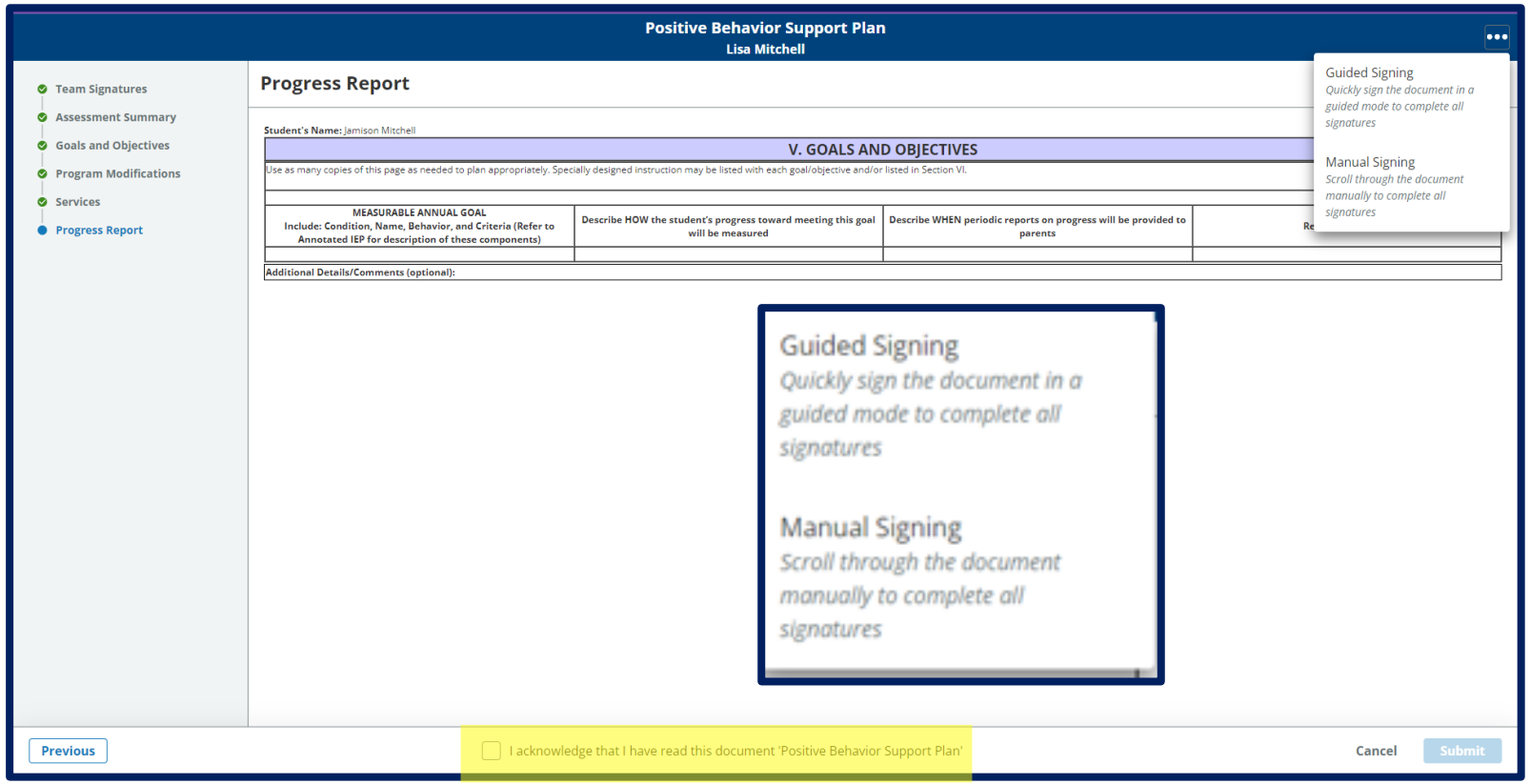
- Manual or Guided Signing.

Step 3**: Complete the required information** on each page and initial or sign where prompted.

- If a page requires a signature or initials, the number of signatures needed will display with the page name.



How-To: Manual or Guided Signing



You can choose to manually move to each action prompt or have the system automatically guide you to each action prompt.

To change your signing experience, choose the options menu (three-dot icon) and select Manual Signing or Guided Signing.

- There is an additional confirmation step for signers using guided signing to acknowledge that they have read the document.

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How-To: Cancel or Refuse Signature

Sign Later	Request to Sign in Person	Decline to Sign Document
Use the link provided in the signature request email to open the document. On the Create Signature page, click **Cancel**. Select **Sign Later** and click **Exit**. You will receive an email with a new signature request link.	Use the link provided in the signature request email to open the document. On the Create Signature page, click **Cancel**. Select **Opt-out of electronic signature and physically sign the document**. Click **Exit**.	Use the link provided in the signature request email to open the document. On the Create Signature page, click **Cancel**. Select **Decline to sign** and enter your **Reason** for declining. Click **Exit**.

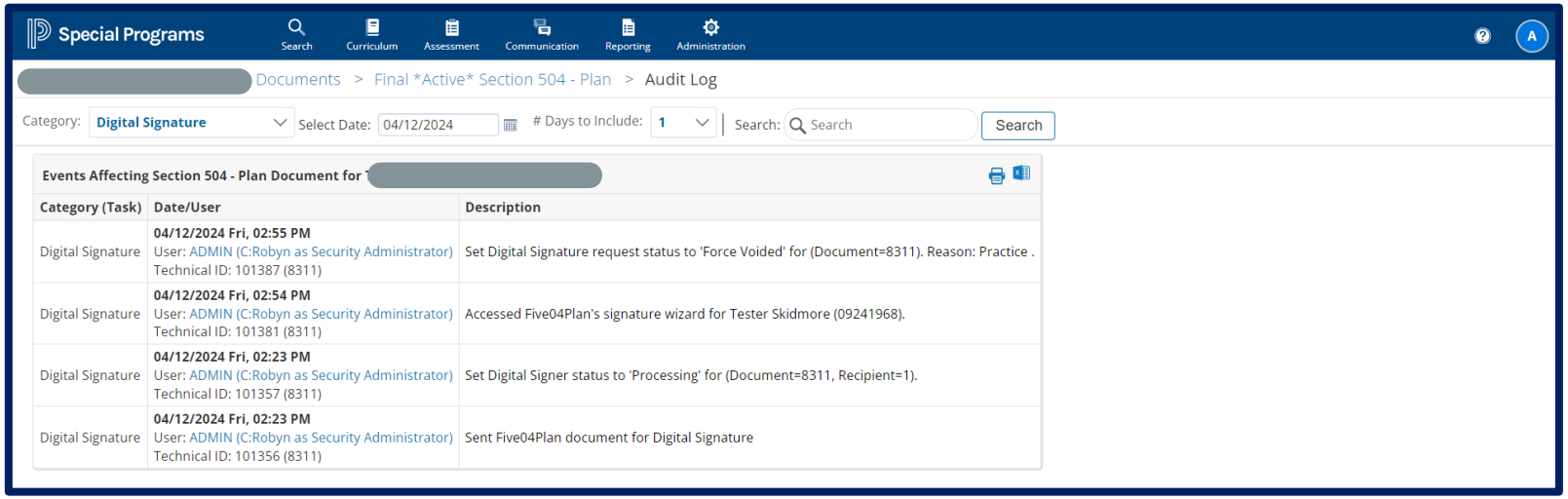
How-To: Void Signature

Staff users with access to the document can void a signature request if the request has not yet been completed.

- Select **Student** and Open the **Document**.
- **More** > **View Digital Signature Details**
- **Signature Request Option** > **Void Digital Signature Request**
- Enter **Reason** for voiding > **Void Request**

This will notify all signers (via email) that the request has been voided and prevent signers from completing the signature request.

How-To: Access to the reason for Voiding a Digital Signature



The reason for **Voiding a Digital Signature request** is listed in the **Audit Log** for the document.

When you open the **Document Audit Log**, it will show the **date/user** and lists the **reason** that was entered when voiding the digital signature request.

Additionally, when you void a digital signature request, an **email** will be sent listing the reason the signature request was canceled.

How-To: Restart Signature Request

- You can restart the signature request if you have not made edits to the document.
- You can restart the request for any signer.
- If you have made edits to the document, you must void the signature request.
- To Restart Signature Request:
    1. Select the student and open the document.
    2. Click **More** and choose **View Digital Signature Details**.
    3. Open the **Signature Request Options** menu and choose **Restart Signature Request**.
    4. On Send Document for Digital Signature page, select a signing preference: **Send through email** or **Sign Now**.

Requested Feature: "Sign Now" vs "Email Request"

Question:

Is there a way to switch back and forth between “Sign Now” and “Email Request” when signing documents?

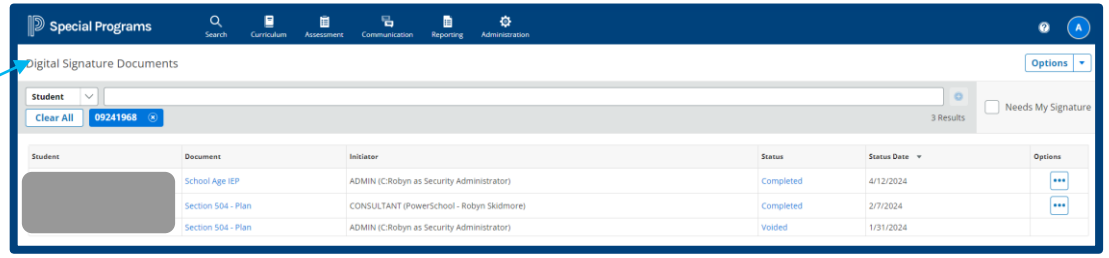
- A lot of times we previously sent the document as “Email Request”, but when we meet with the parents/guardians, we are wondering if we can switch to ‘Sign Now’ since we have the parent right in front of us during an IEP meeting.

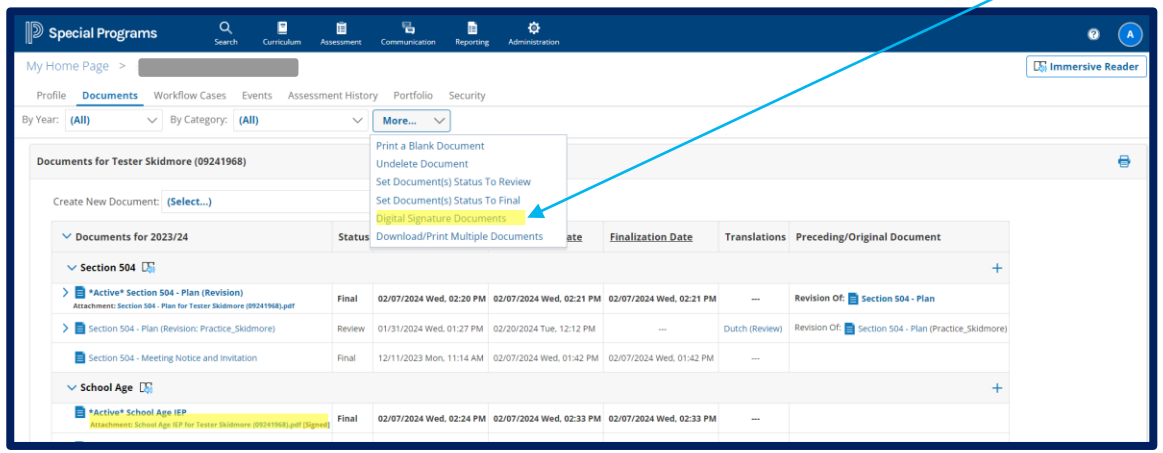
Answer: Yes!!

If the signing process is not complete, you can switch to using Sign Now after sending email requests. From the document, click **More** and choose **View Digital Signature Details**. Then select **Signature Request Options** and choose **Sign Now**

Where can I find the completed, signed document?

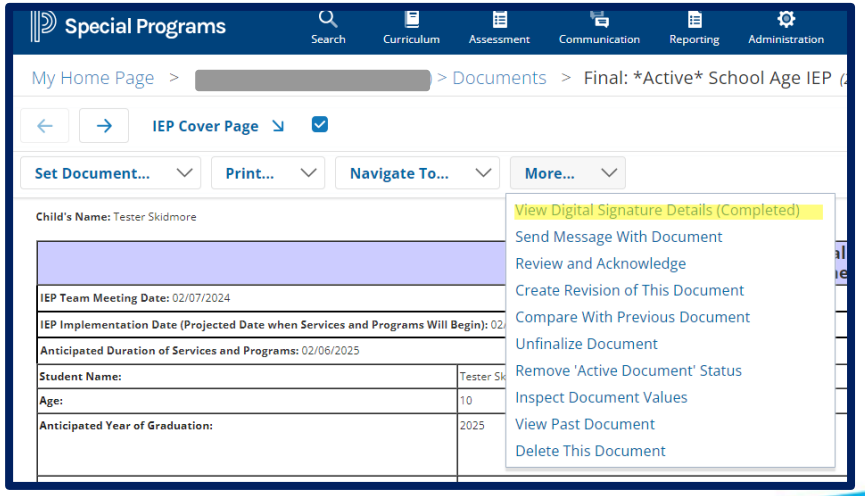
Digital Signature Utility





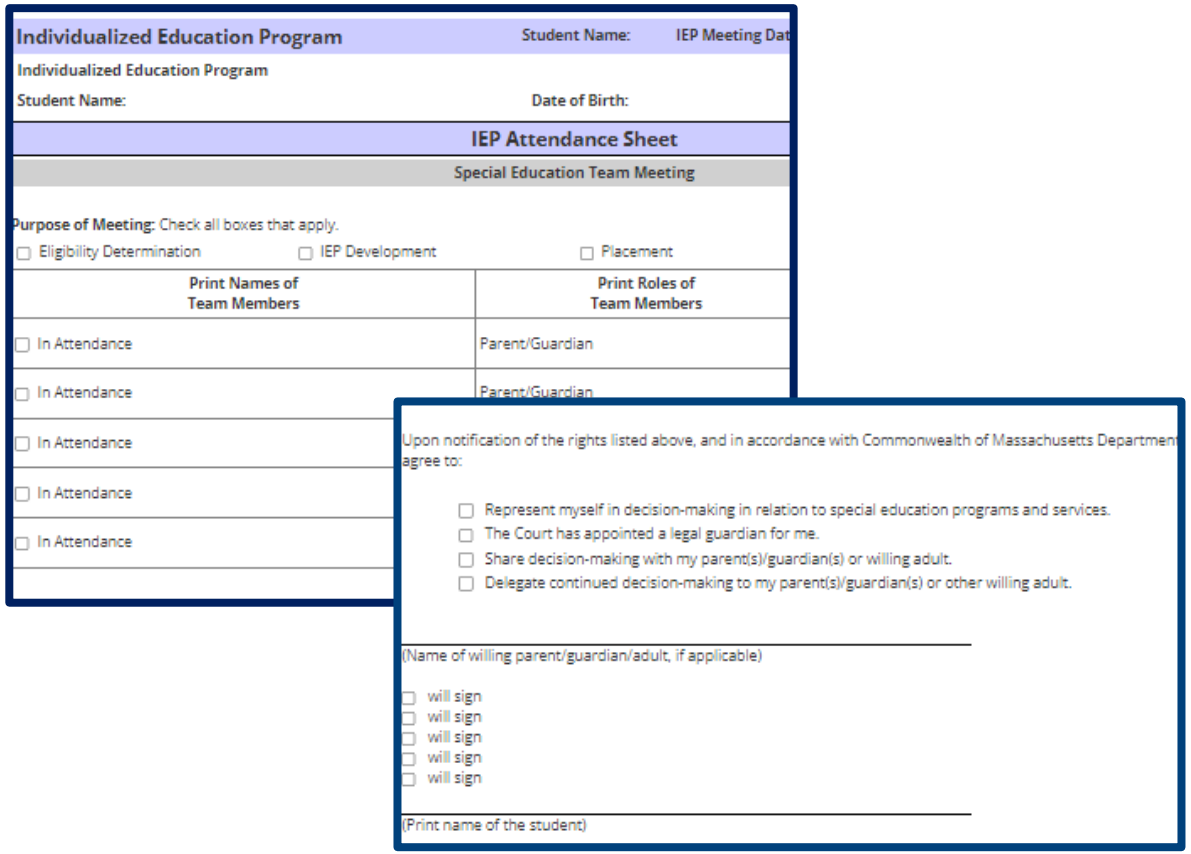
Attachment link on Student's Document List
Or
More > Digital Signature Documents.

In Student Document, under More



Document Template: Know Document Checkboxes

- Document templates vary between state and province models.
- In some documents, the parent's name listed on the attendance sheet is enough to trigger listing as a signee.
- Most documents will require checking off at least one “In Attendance” for the parent or staff to receive a copy to sign.
- Other documents require checking off “will sign” for the parent to receive a copy.
- THESE CHECK BOXES TRIGGER INCLUSION ON eSIGNATURE RECIPIENT LIST.



Individualized Education Program | Student Name: | IEP Meeting Dat

Individualized Education Program

Student Name: | Date of Birth:

IEP Attendance Sheet

Special Education Team Meeting

Purpose of Meeting: Check all boxes that apply.

☐ Eligibility Determination ☐ IEP Development ☐ Placement

Print Names of Team Members	Print Roles of Team Members
☐ In Attendance	Parent/Guardian
☐ In Attendance	Parent/Guardian
☐ In Attendance	
☐ In Attendance	
☐ In Attendance	

Upon notification of the rights listed above, and in accordance with Commonwealth of Massachusetts Department agree to:

☐ Represent myself in decision-making in relation to special education programs and services.
☐ The Court has appointed a legal guardian for me.
☐ Share decision-making with my parent(s)/guardian(s) or willing adult.
☐ Delegate continued decision-making to my parent(s)/guardian(s) or other willing adult.

(Name of willing parent/guardian/adult, if applicable)

☐ will sign
☐ will sign
☐ will sign
☐ will sign
☐ will sign

(Print name of the student)

Digital Signature: Parent/Guardian Signers

Parent/Guardian Signers

Sign through **Email** or in-person with **Sign Now**
Create a signature. ***This is only signature creation; this does not sign the document.***
Chose to **Sign Later**, Request to **Sign in Person** or **Decline** to Sign Document.
Generate a **new link** if the existing link is expired.

Digital Signature: Parent Receives Email

Please review and e-sign this Placement Consent Form - PL1: 3-5 year olds document

D donotreply@specialeducation.powerschool.com
To [redacted]

Reply | Reply All | Forward | ...

Wed 6/29/2022 8:14 PM

This message was sent with High importance.
If there are problems with how this message is displayed, click here to view it in a web browser.

EXTERNAL

There is a document associated with your student's learning plan that needs your review ar

Sign Document

If you're having trouble viewing the Sign Document button, use the link below.
https://ne.specialeducation.powerschool.com/userlogin_otp.aspx?token=h83kgBPv3zS
2BOE1NzBgIBdak8vdcgYwp2OGirsP1pHRrcjPDsDPDAJE9YuYJgYR7QKw7ibVucbIVBbA%3
3D&continue=signtemplatedoc.aspx%3ftemplate%3d135%26doc%3d2668

Do Not Share This Email
This email contains a secure link. Please do not share this email, link, or access code with others.

Please review and e-sign this Parent Invitation document. External Inbox ×

donotreply@specialeducation.powerschool.com
to me

11:41PM (1 minute ago)

Akron Public Schools
10 North Main Street
Akron, Ohio 44308

Please review and e-sign this Parent Invitation PR-02 for an upcoming team meeting on 04/01/2023, for student #0123456789 in grade 02.

Remember, when e-signing is complete, you will receive the following message: "You have successfully signed this document. A copy will be emailed to you AFTER everyone completes signing. You may close this window."

If you have questions or need assistance, please contact [redacted]

Thank you!

Sign Document

If you're having trouble viewing the Sign Document button, use the link below.
https://mw.specialeducation.powerschool.com/userlogin_otp.aspx?token=zTzgOeRkFnedSu7JzstdaZkaAWE2GypnL1uxaL2vyOM4%2Bgs9upPjo%2B7yZSpPug2PYa%
2FHgT6jpdLTMV8zRdVRyA%3D%3D&continue=signtemplatedoc.aspx%3ftemplate%3d126%26doc%3d347549

Do Not Share This Email
This email contains a secure link. Please do not share this email, link, or access code with others.

Reply | Forward

Digital Signature: Management

Digital Signature Details
Select Student > Open Document > More > View Digital Signature Details

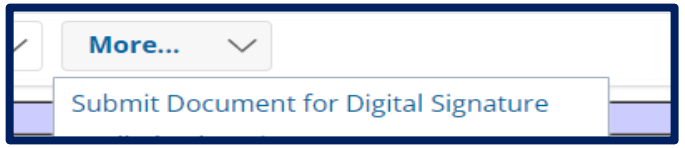
During Signing

- **Check** signers/signature status.
- **Restart** Signature Request.
- **Accept** with Pending or Current Signatures.
- **Edit** a Signer's Response.
- **Void** a Signer's Request if all signer's have NOT signed the document.
- **Send** Signed Document and Certificate of Completion.
- **Sign Now**
- **Refresh**

After Signing

- **Save** as **Primary Signer**.
- **Edit** signer's response.
- Send **certificate of completion**.
- **Send** signed document.
- **Restart** Digital Signature Process.
- **Refresh**
- If parent opts-out of electronic signature, signer's response can be entered, must provide reason.
- If signer declines to sign, staff can view reason for declining to sign and edit the signer's response.
- Review Signer Consents.

Digital Signature Details: Signing Status
Select document > More



Status
Sent
Auto responded
Delivered
Declined
Voided
Signed
Completed
Unsigned

Digital Signature Details

Restart Signature Request	• You can restart the signature request **if you have not made edits to the document**. • You can restart the request for any signer. • If you have made edits to the document, you must **void the signature request.**
Edit a Signer's Response	• If the signer has already signed the document, a new signature request email will be sent. • Signers can review your edits when they sign the document.
Send Signed Document and Certificate of Completion	After the signing process is complete, you can email the signer's link to the signed document and the completion certificate.
Primary Signer * The primary signer data flow is dependent on your state model configuration.	**By default, the first signer is assigned the primary signer status**. • When more than one parent or guardian signs the document, the system updates the document after each additional signature to reflect the primary signer's responses. • This process can take up to two minutes to complete. • The system saves all signer responses when the signing process is complete, and the final PDF includes every response.
Review Signer Consents	• To review the consent answers for all parents and guardians who have completed the signing process.

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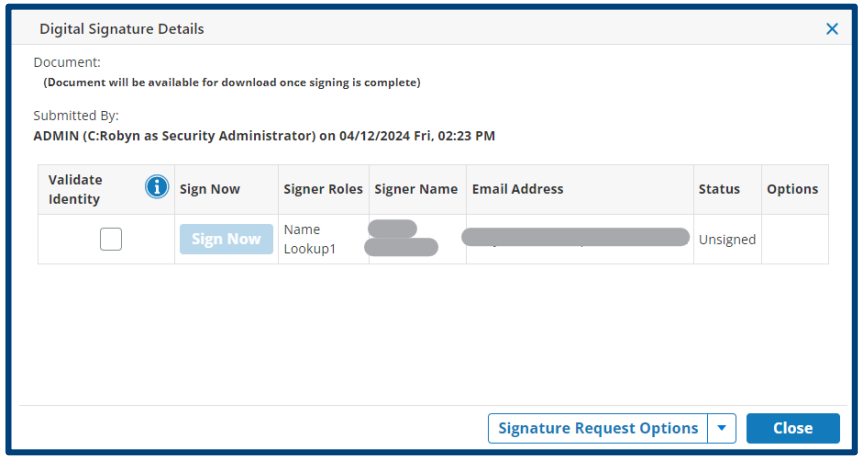
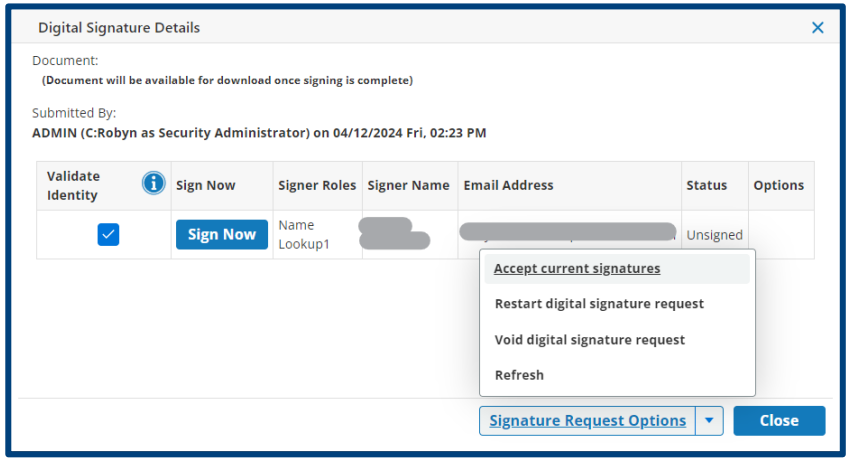
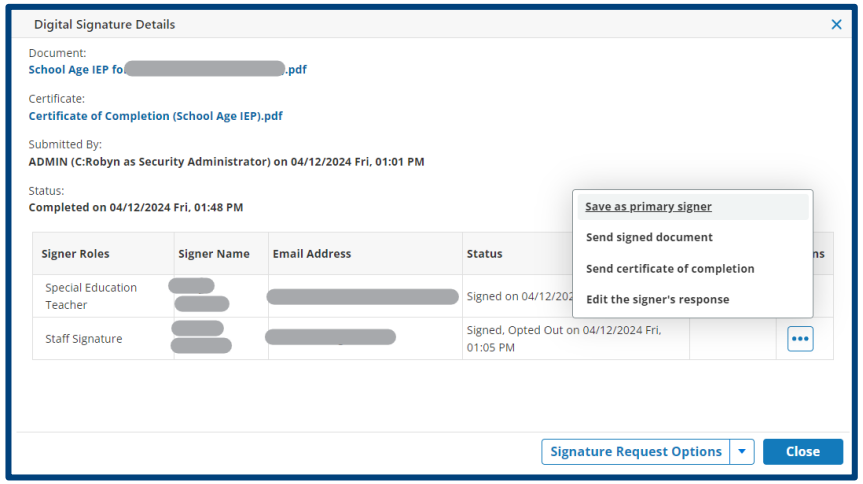
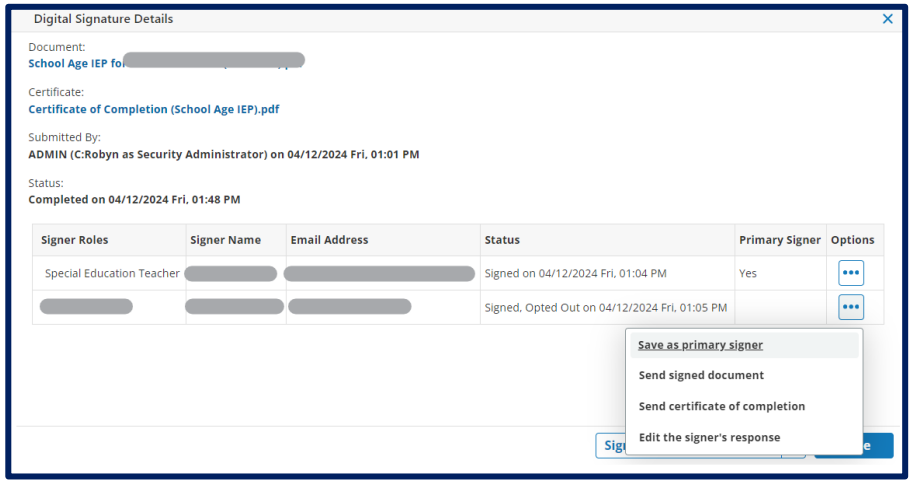
Digital Signature Details Examples









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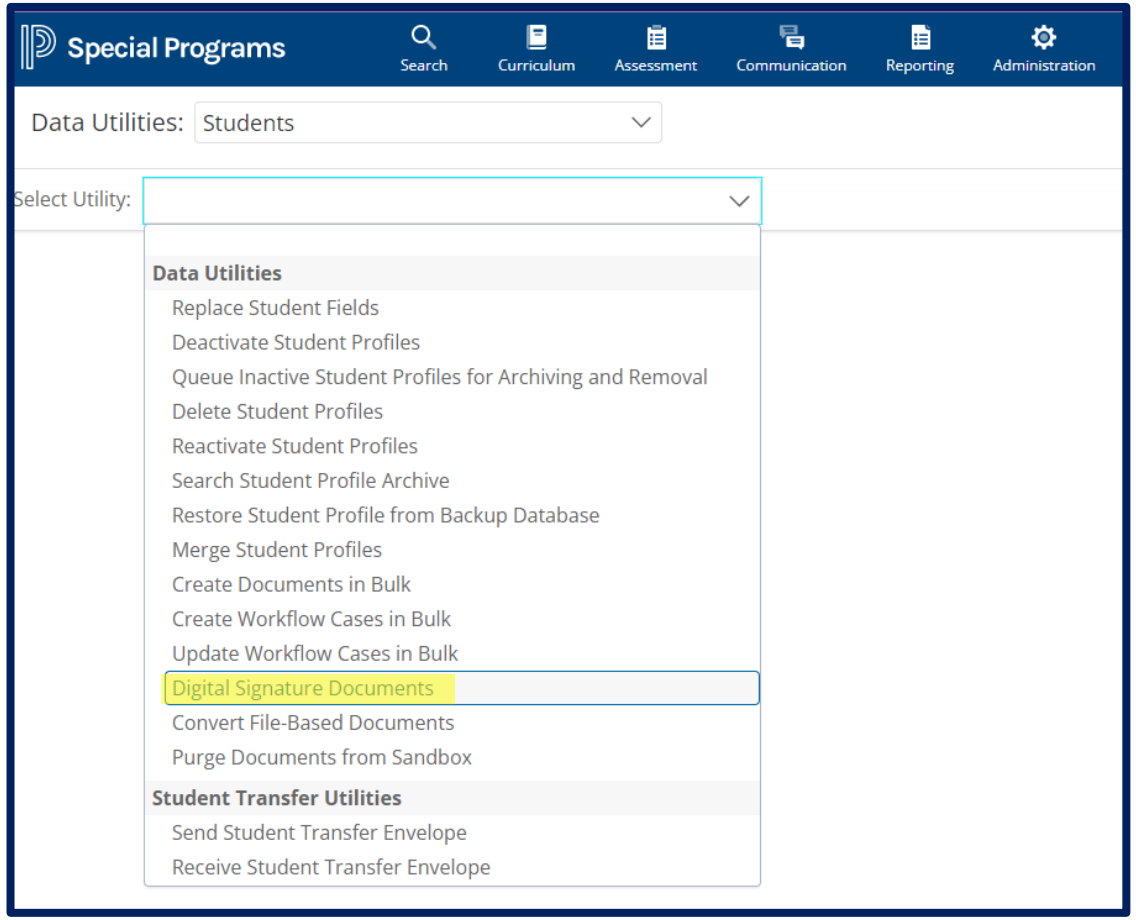
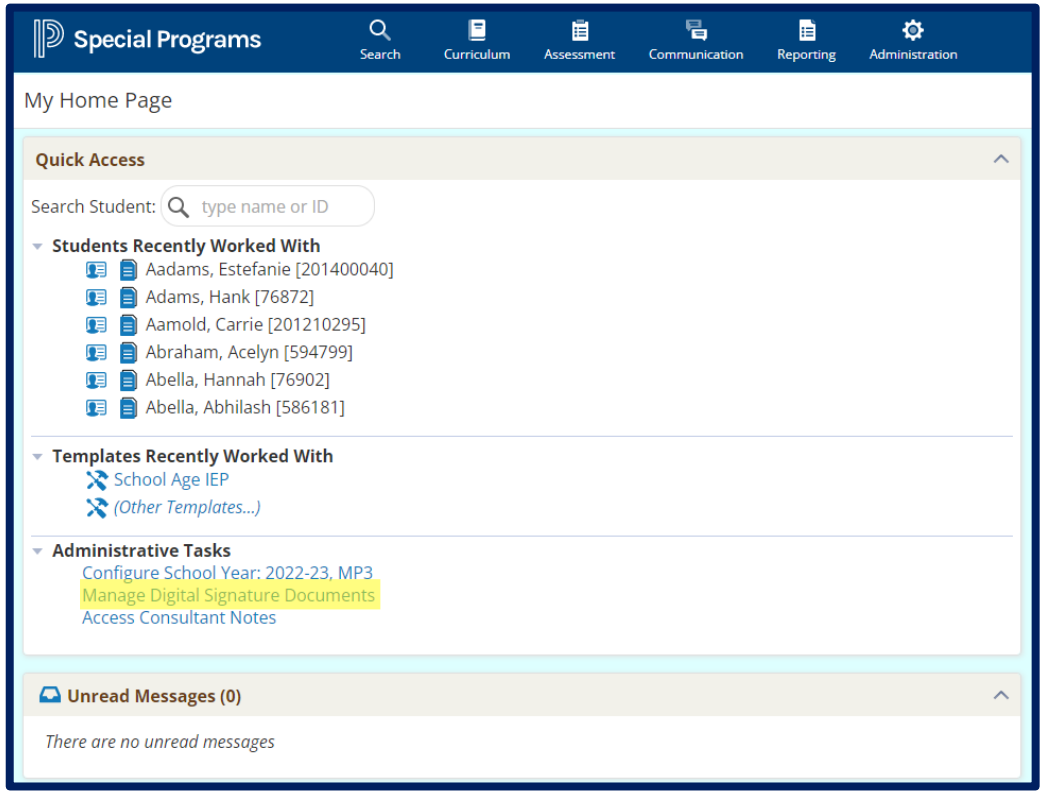
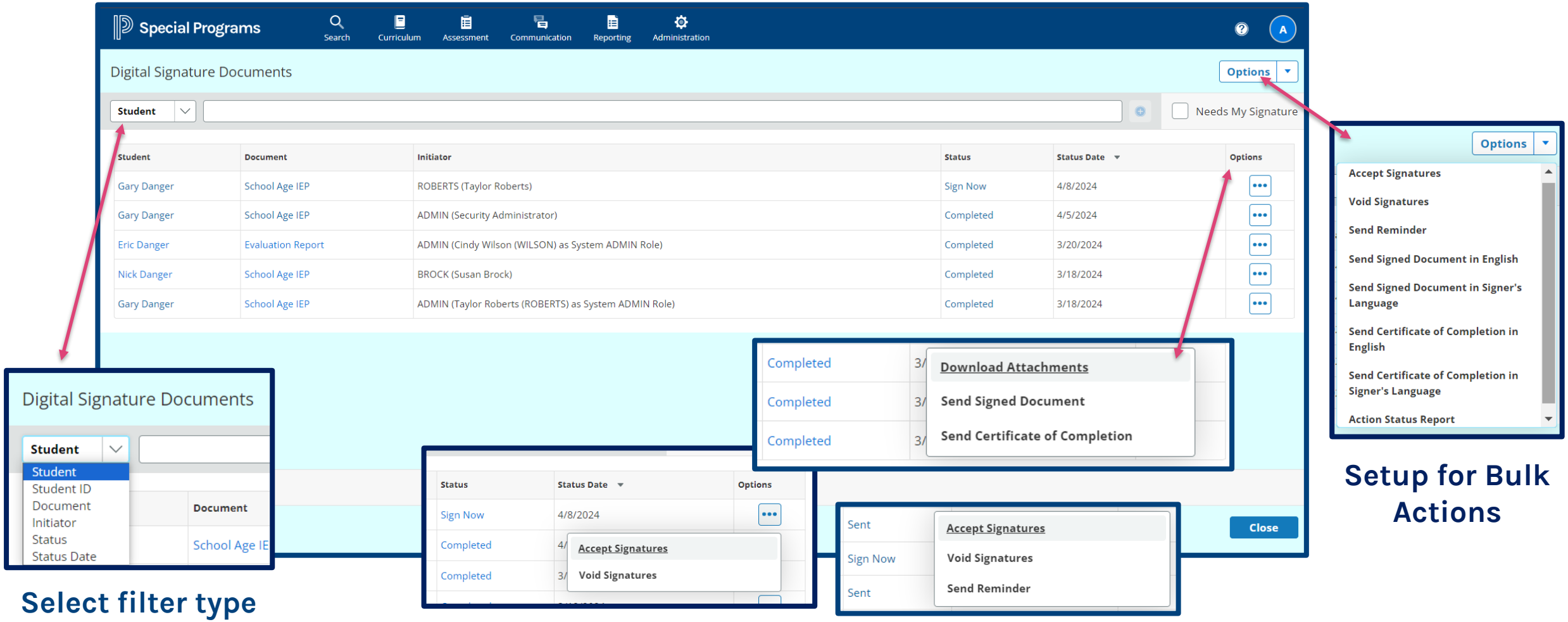
How-To: Digital Signature Documents Utility

Administration > Utilities > Students > Digital Signature Documents





Click on blue hyperlink for more Status details, visit the Document or go to the Student's Profile.

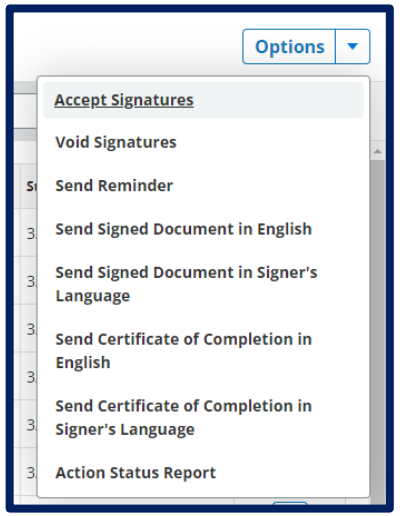


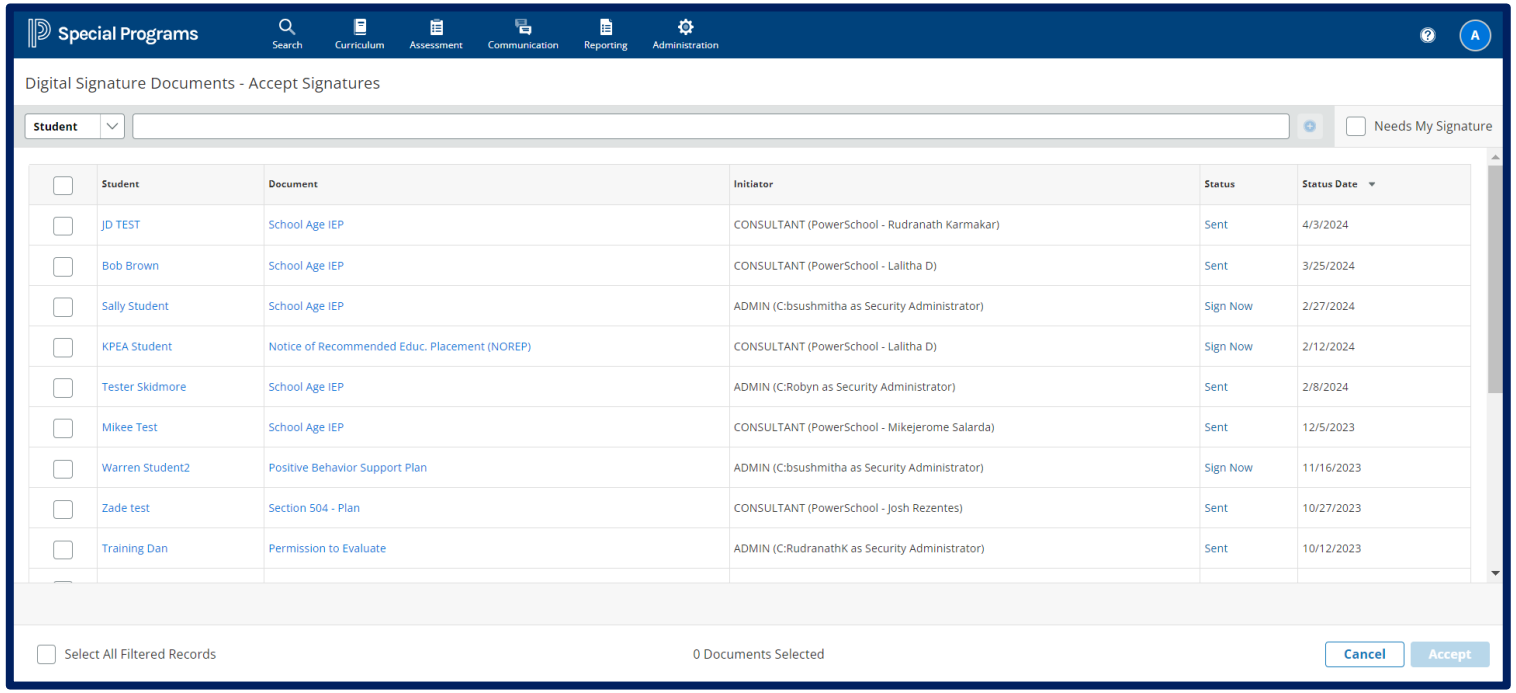
Select filter type

Setup for Bulk Actions

Document Options is available for individual documents. Option will depend on the Document Status

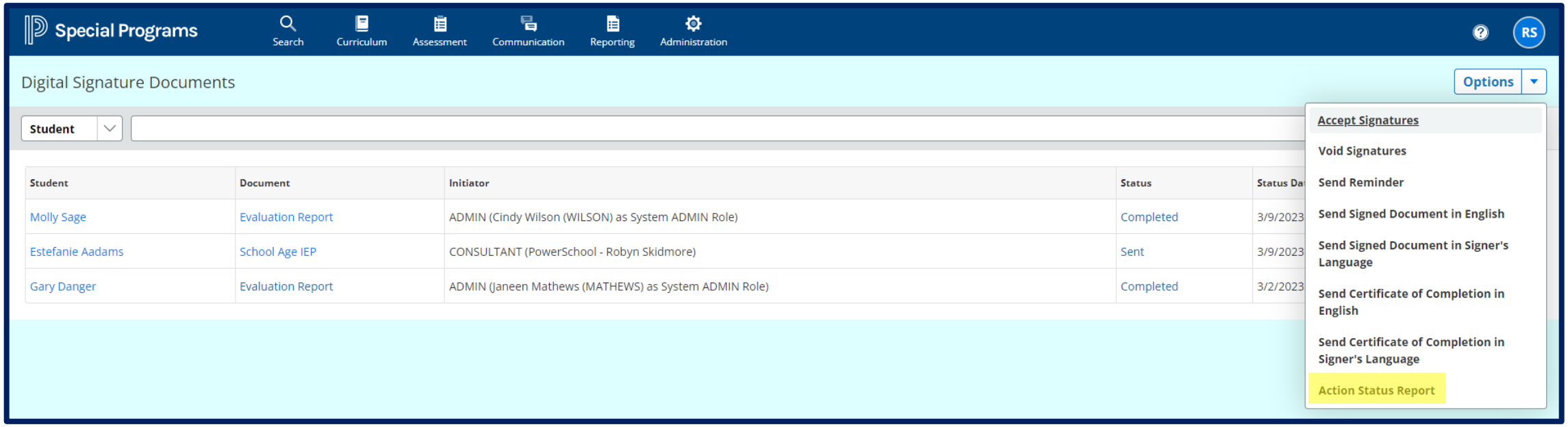
How-To: Assign Bulk Actions

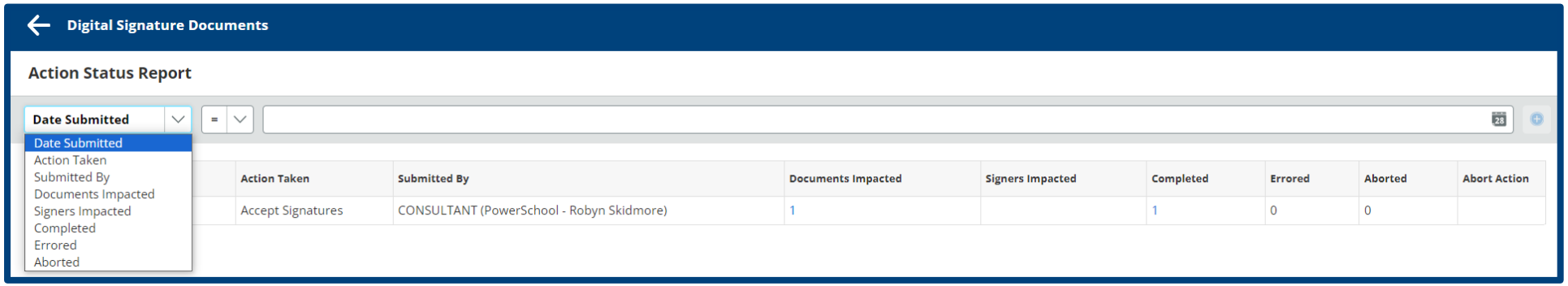




- *Filter results for Documents needing your signature*
- *Act on a single or multiple documents*
- *Choose Options > Action Status Report to review document information.*

How-To: Action Status Report





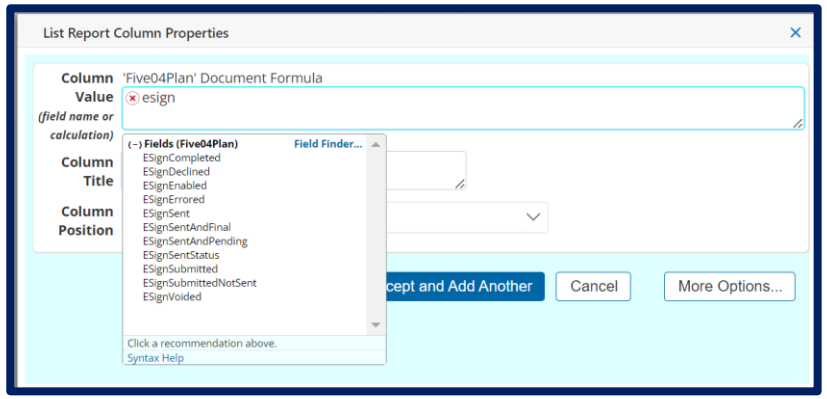
Digital Signature: Reporting

How-To: List Statuses for Digital Signature Configured Document Templates

1. From the Homepage of PSSP, navigate to **Reporting**.
2. Navigate to **Standard Reports**.
3. Select **New List Report**.
4. Add in the **Report Name**.
5. **Type of Information** as **Student Documents**
6. Select the specific Document.
7. Check the required options. (Eg; '**Final Documents Only**', '**Active Documents Only**')
8. Click '**Accept**'.
9. Click on the + icon where the **Digital Signature** values needs to be listed.

How-To: Formula Reference for Digital Signature Special Values

Function	Description
ESignSubmittedNotSent	Returns true if the signature request status is Processing.
ESignSent	Returns true if the signature request has been sent to signers.
ESignSentAndPending	Returns true if the signature request has been sent to signers, but the request has not been completed or voided.
ESignSentAndFinal	Returns true if the signature request has been sent to signers and the request has been completed or voided.
ESignVoided	Returns true if the signature request has been voided.
ESignCompleted	Returns true if the signature request has been completed.
ESignSentStatus	Returns the current status of the signature request as text, for example, Processing or Sent.



Digital Signature: Good to Know

- **Troubleshooting**:
  - Check Digital Signature Settings: Is Digital Signature enabled?
  - Check Document Template Behavior Options: Is Remote Signing enabled?
  - Check Template Security: Do the users submitting documents have the permission to read and write to the document template?
  - Check Receives Mail checkbox if no email address available to submit for signature.
- After sending for signature, the document locks.
  - **No more editing until signature process is completed**.
- Cannot re-send document for signature unless the previous one was cancelled.

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Q & A

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Thank you for your Partnership!

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