

Welcome to the Special Programs PowerSchool PowerUp!



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		

Special Programs PowerUps Team



Robyn Skidmore

**Senior Educational Impact
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

Digital Signature Auto-Acceptance Feature

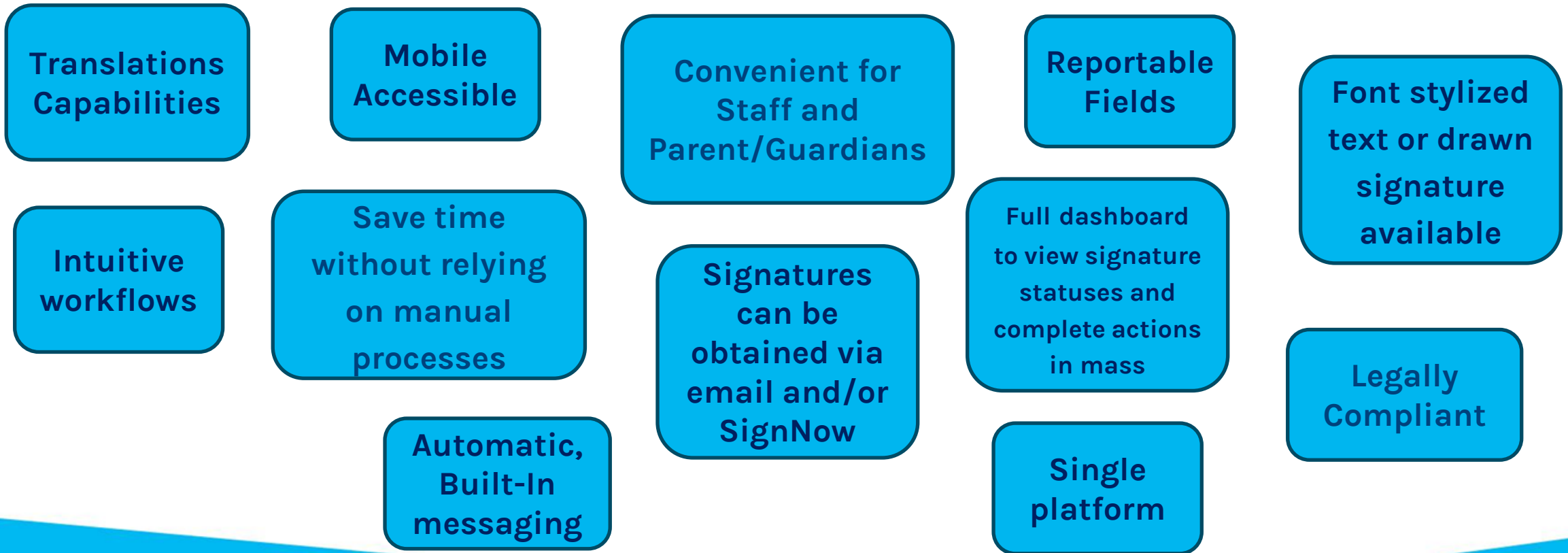
- Auto-Acceptance of documents if at least one signature is present (based on age > 150 days)
- Auto-Void of documents if no signatures are present (based on age > 150 days)
- Process runs daily (every 24 hours)
- Summary/reminder emails & notifications weekly
 - contain a list of documents in the following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



Before You Begin: How Does It Work?

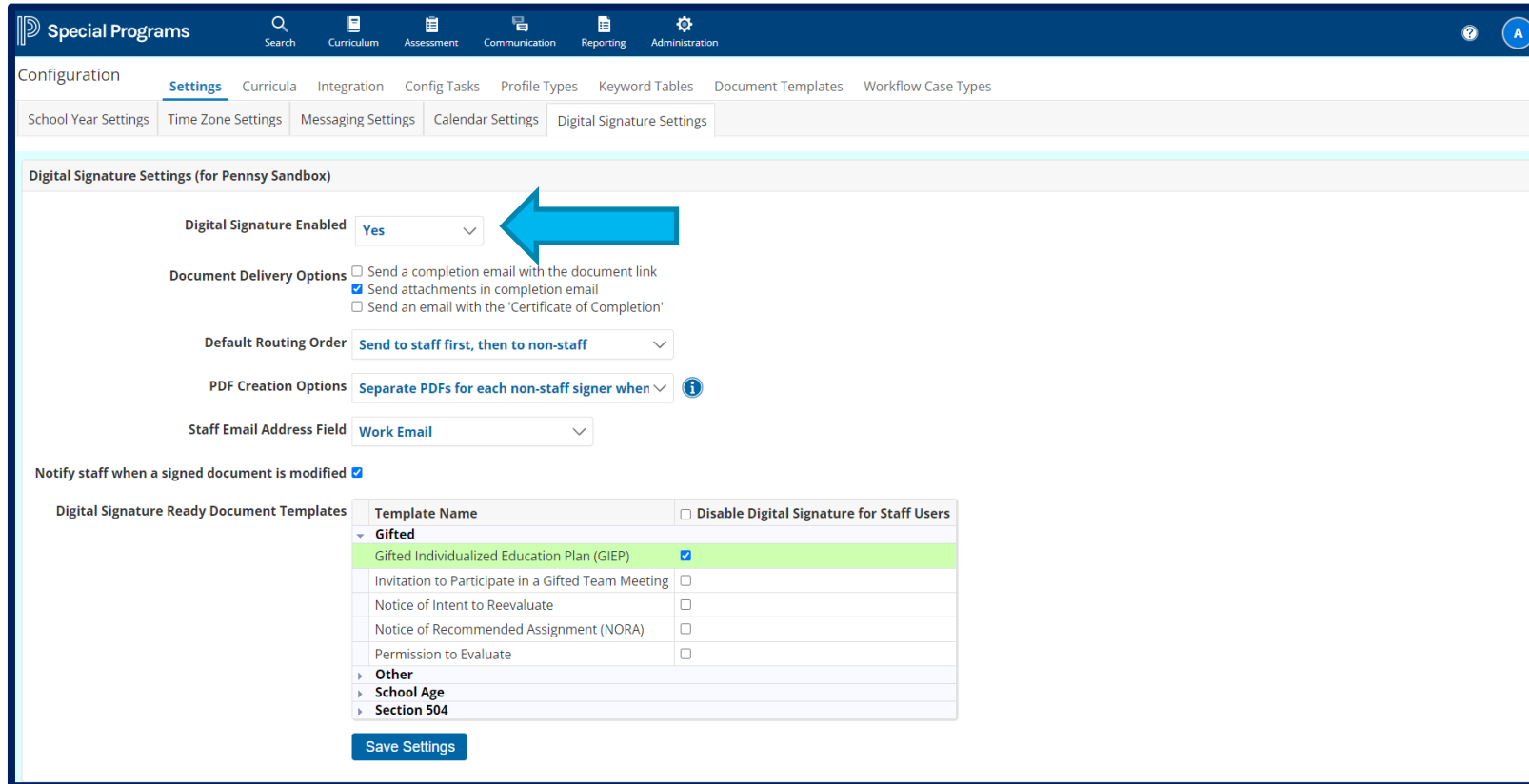
- ✓ **Need a License and an Account**
- ✓ Deployment with **Document Templates ready** for your State or Province model.
 - After log-in to Special Programs, go to ? > **State Resources** to view documents configured for Digital Signature.
- ✓ Setup Digital Signature **Account Settings**.
- ✓ Setup the **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



Special Programs

Configuration

Settings

Digital Signature Settings (for Pennsy Sandbox)

Digital Signature Enabled: Yes

Document Delivery Options

- Send a completion email with the document link
- Send attachments in completion email
- Send an email with the 'Certificate of Completion'

Default Routing Order: Send to staff first, then to non-staff

PDF Creation Options: Separate PDFs for each non-staff signer when

Staff Email Address Field: Work Email

Notify staff when a signed document is modified

Digital Signature Ready Document Templates

Template Name	Disable Digital Signature for Staff Users
Gifted	
Gifted Individualized Education Plan (GIEP)	<input checked="" type="checkbox"/>
Invitation to Participate in a Gifted Team Meeting	<input type="checkbox"/>
Notice of Intent to Reevaluate	<input type="checkbox"/>
Notice of Recommended Assignment (NORA)	<input type="checkbox"/>
Permission to Evaluate	<input type="checkbox"/>
Other	
School Age	
Section 504	

Save 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):

eSignature Email:

Blurb (Optional):

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

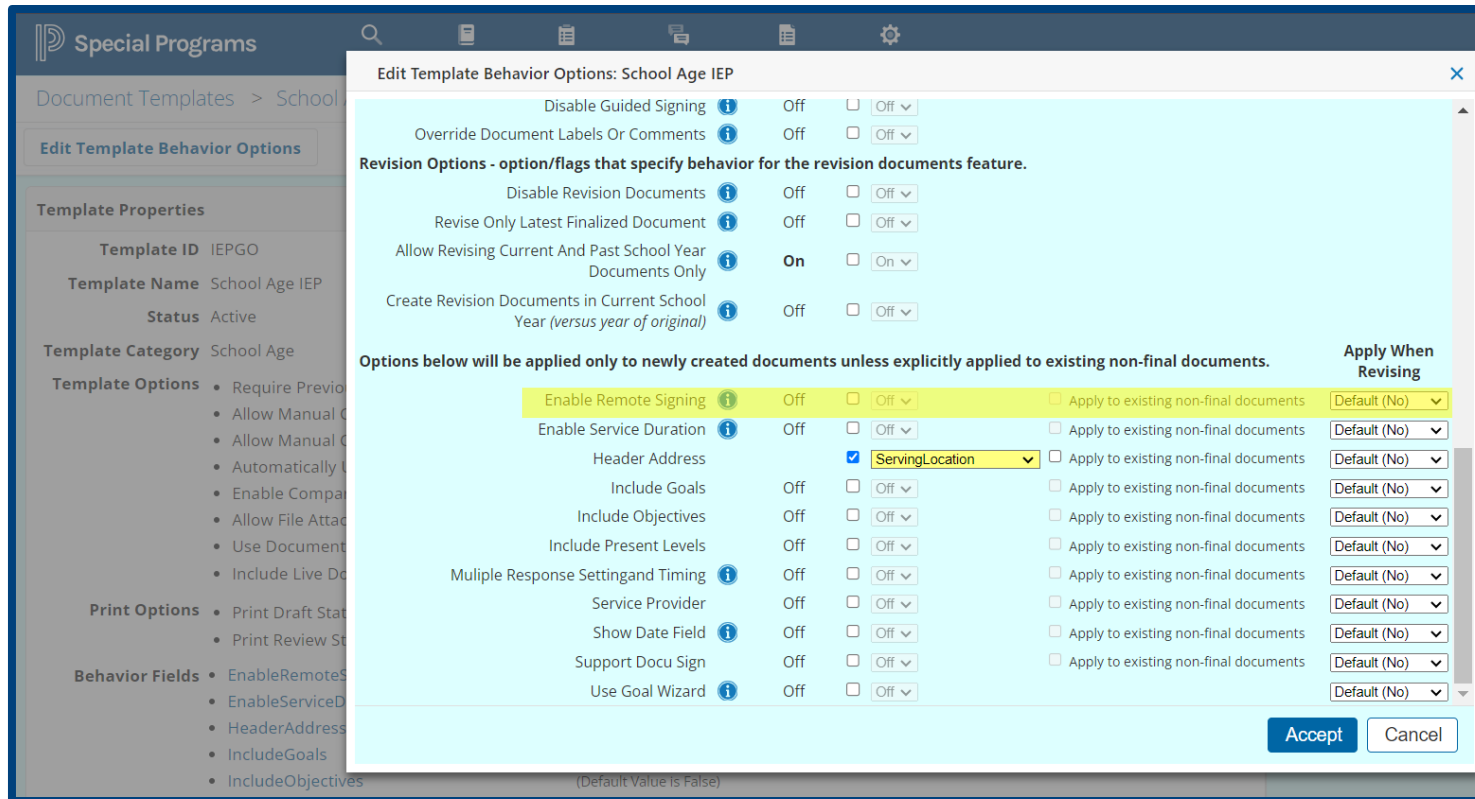
eSignature Options: Allow Submitting Review Documents
 Disallow Submitting Final Documents

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)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	Parent2Sign	Parent/Guardian	Document	IF(SupportDocuSign AND Parent2Signs AND Profile.Parent2ReceivesLetters, Parent2NameCalc)	IF(SupportDocuSign AND Parent2Signs AND Profile.Parent2ReceivesLetters, Profile.Parent2Email)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	Contact3Sign	Parent/Guardian	Document	IF(SupportDocuSign AND Contact3Signs AND Profile.Contact3ReceivesLetters, Contact3NameCalc)	IF(SupportDocuSign AND Contact3Signs AND Profile.Contact3ReceivesLetters, Profile.Contact3Email)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	Contact4Sign	Parent/Guardian	Document	IF(SupportDocuSign AND Contact4Signs AND Profile.Contact4ReceivesLetters, Contact4NameCalc)	IF(SupportDocuSign AND Contact4Signs AND Profile.Contact4ReceivesLetters, Profile.Contact4Email)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	StudentSign	Student	Document	IF(SupportDocuSign AND StudentSigns AND StudentNameCalc IS NOT EMPTY, StudentNameCalc)	IF(SupportDocuSign AND StudentSigns AND StudentNameCalc IS NOT EMPTY, Profile.StudentEmail)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Accept Cancel Delete Configuration

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

Special Programs

Document Templates > School Age IEP (IEPGO) > Template Security

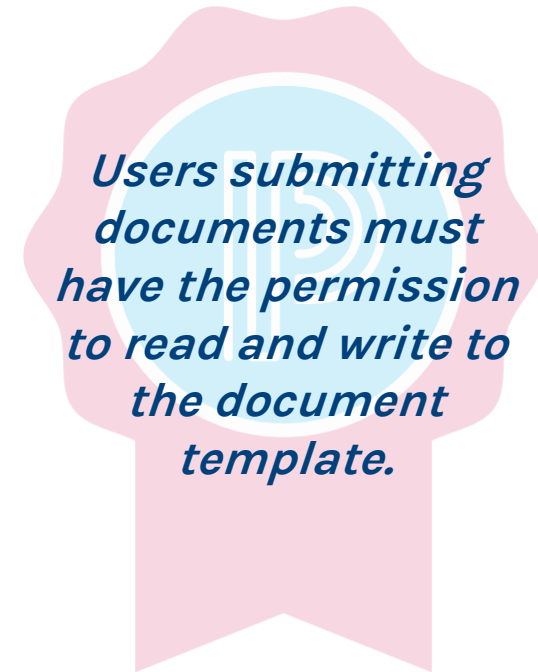
Security Rights Other Security Options

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Security Rights: School Age IEP (IEPGO) Save Changes Cancel Changes

Security Group	Document-Wide View/Edit Rights								Status Change Rights				Print	Review Acknowledge	Attach Files	Edit Files Attached by Others	Attach Files to Final Documents	Edit Public Statement Banks	Force Finalize
	View	View Final Only	Create	Edit Draft	Edit Review	Edit Final	Translate	Delete	Set Draft	Set Review	Set Final	Set Active							
504 Specialist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Building Administrators	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
District Administrators	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ELL Specialist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GenEd Teacher	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gifted Specialist	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
RTI/MTSS Specialist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
School Counselors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Special Education Specialist	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Save Changes Cancel Changes



More...

Submit Document for Digital Signature

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)

Parent Contact Information	
	First Parent / Guardian
Name	Adams, Calvin
First Name	
Last Name	
Relation	(none) v
Address	
City	
State	(none) v
ZIP Code	
1st Phone Number	312-555-6055 x
(Type)	Cell v
2nd Phone Number	x
(Type)	(none) v
3rd Phone Number	x
(Type)	(none) v
Email	
Has Custody	<input type="checkbox"/>
Receives Letters	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

Send Document for Digital Signature				
Routing Order Send to all signers at the same time v				
Signer Role	Signer Name	Email Address	Language	Opt-out ⁱ
Parent 1	Mother Sample			
Parent 2	Father Sample			

The signer will not receive a Digital Signature request. Use an alternate contact method to request the signer physically sign the document.

Contact Information	
Person 1	
Name:	Mother Sample
Relationship	Mother
Address	
City	
State	
Zip Code	
Primary Language	
Home Phone	
Work Phone	
Cell Phone	
Email Address	
Receives Letters	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

Cancel Send

How-To: Submit Document for Signature

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

Email Request: Sign via email link

Sign Now: Sign on device in the same room.

The 'Send Document for Digital Signature' window shows a 'Signing Preference' dropdown set to 'Send through email'. Below is a table of signers:

Signer Role	Signer Name	Email Address	Language	Opt-out
IEPTeam Teacher	Taylor Roberts	sptrainer001@gmail.com	English	<input type="checkbox"/>
IEPTeam Teacher2	Robyn Skidmore	sptrain@gmail.com	English	<input type="checkbox"/>

A 'Digital Signature Details' pop-up window is overlaid, showing document information and a table of signers. A context menu is open over the table with options: 'Accept current signatures', 'Restart digital signature request', 'Void digital signature request', 'Sign now', and 'Refresh'. A red arrow points from the 'Sign now' option to the text box below.

The 'Digital Signature Details' window shows document information and a table of signers:

Validate Identity	Sign Now	Signer Roles	Signer Name	Email Address	Status	Options
<input checked="" type="checkbox"/>	Sign Now	IEPTeam Teacher	Taylor Roberts	sptrainer001@gmail.com	Unsigned	
<input type="checkbox"/>	Sign Now	IEPTeam Teacher2	Robyn Skidmore	sptrain@gmail.com	Unsigned	

A 'Digital Signature Details' pop-up window is overlaid, showing document information and a table of signers. A context menu is open over the table with options: 'Accept current signatures', 'Restart digital signature request', 'Void digital signature request', and 'Refresh'.

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

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.

The screenshot shows a 'Create Signature' form with the following elements:

- Full Name** (Required): Text input field containing 'Mother Mother'.
- Initials** (Required): Text input field containing 'MM'.
- Font Style** / **Draw** section: Four radio button options labeled 'Style 1', 'Style 2', 'Style 3', and 'Style 4'. 'Style 4' is selected.
- Signature**: A preview box showing the text 'Mother Mother' in a cursive font.
- Initials**: A preview box showing the text 'MM' in a cursive font.
- Signature Authorization** section:
 - I agree** (Required): A checkbox with a checkmark. Below it is the text: 'By selecting Create, I agree that this mark will be the electronic representation of my signature or initials whenever I use it.'
 - Save signature for future use**: A checkbox with a checkmark. Below it is the text: 'I agree to save this as the digital representation of my signature for future use.'
- Buttons**: 'Cancel' and 'Create' buttons at the bottom right.

How-To: Manual or Guided Signing

Positive Behavior Support Plan
Lisa Mitchell

Progress Report

Student's Name: Jamison Mitchell

V. GOALS AND OBJECTIVES

Use as many copies of this page as needed to plan appropriately. Specially designed instruction may be listed with each goal/objective and/or listed in Section VI.

MEASURABLE ANNUAL GOAL Include: Condition, Name, Behavior, and Criteria (Refer to Annotated IEP for description of these components)	Describe HOW the student's progress toward meeting this goal will be measured	Describe WHEN periodic reports on progress will be provided to parents	Re

Additional Details/Comments (optional):

Guided Signing
Quickly sign the document in a guided mode to complete all signatures

Manual Signing
Scroll through the document manually to complete all signatures

Previous I acknowledge that I have read this document 'Positive Behavior Support Plan' Cancel Submit

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.

How-To: Cancel or Refuse Signature

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

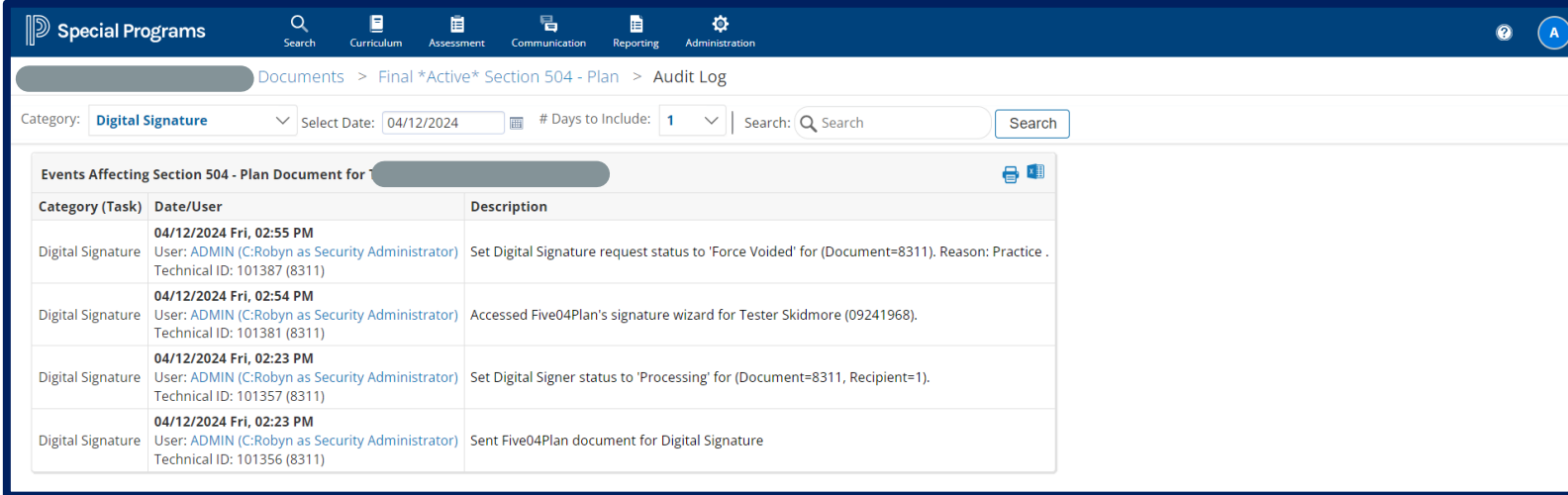
How-To: Void Signature

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 screenshot shows the 'Special Programs' interface with the 'Audit Log' for a document titled 'Final *Active* Section 504 - Plan'. The category is set to 'Digital Signature' and the date is '04/12/2024'. The table below lists five events:

Category (Task)	Date/User	Description
Digital Signature	04/12/2024 Fri, 02:55 PM User: ADMIN (C:Robyn as Security Administrator) Technical ID: 101387 (8311)	Set Digital Signature request status to 'Force Voided' for (Document=8311). Reason: Practice .
Digital Signature	04/12/2024 Fri, 02:54 PM User: ADMIN (C:Robyn as Security Administrator) Technical ID: 101381 (8311)	Accessed Five04Plan's signature wizard for Tester Skidmore (09241968).
Digital Signature	04/12/2024 Fri, 02:23 PM User: ADMIN (C:Robyn as Security Administrator) Technical ID: 101357 (8311)	Set Digital Signer status to 'Processing' for (Document=8311, Recipient=1).
Digital Signature	04/12/2024 Fri, 02:23 PM User: ADMIN (C:Robyn as Security Administrator) Technical ID: 101356 (8311)	Sent Five04Plan document for 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?

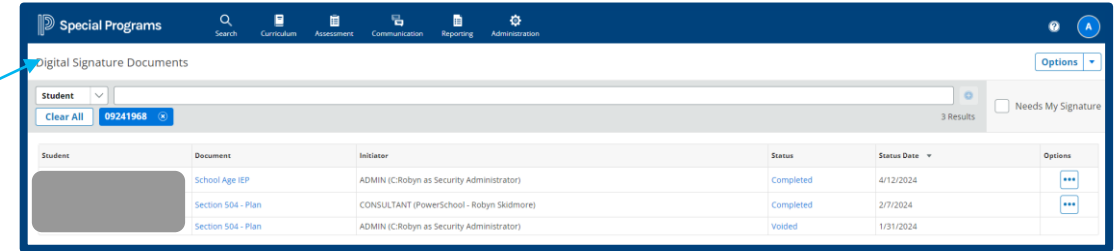
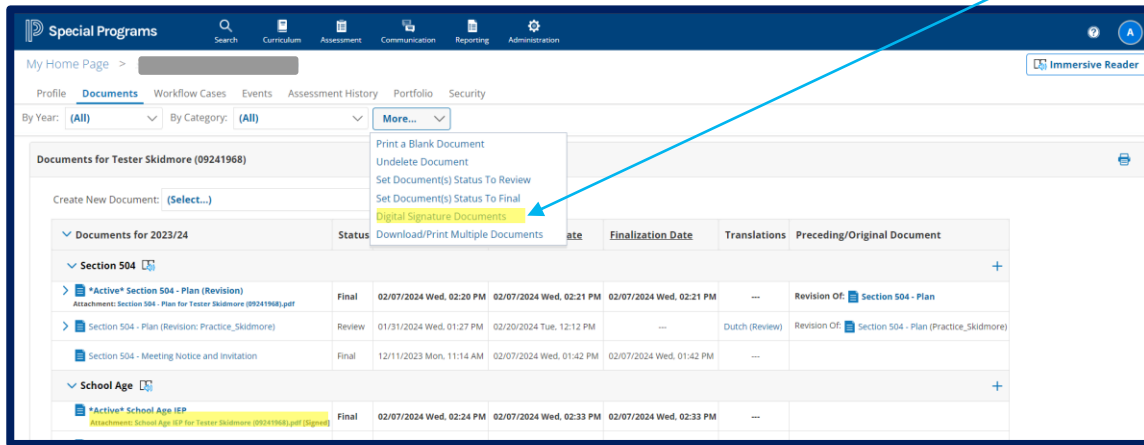
- A lot of times we previously sent the document as “Email Request”, but when we meet with the parents/guardians, we are wondering if we can switch to ‘Sign Now’ since we have the parent right in front of us during an IEP meeting.

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**

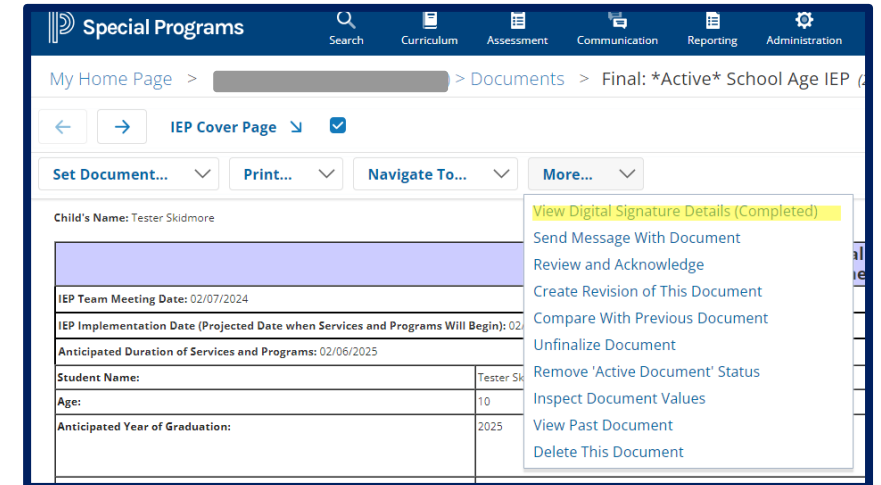
Where can I find the completed, signed document?

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 Date:
Individualized Education Program			
Student Name:		Date of Birth:	
IEP Attendance Sheet			
Special Education Team Meeting			
Purpose of Meeting: Check all boxes that apply.			
<input type="checkbox"/> Eligibility Determination	<input type="checkbox"/> IEP Development	<input type="checkbox"/> Placement	
Print Names of Team Members		Print Roles of Team Members	
<input type="checkbox"/> In Attendance		Parent/Guardian	
<input type="checkbox"/> In Attendance		Parent/Guardian	
<input type="checkbox"/> In Attendance			
<input type="checkbox"/> In Attendance			
<input type="checkbox"/> In Attendance			
Upon notification of the rights listed above, and in accordance with Commonwealth of Massachusetts Department of Education, I agree to:			
<input type="checkbox"/> Represent myself in decision-making in relation to special education programs and services.			
<input type="checkbox"/> The Court has appointed a legal guardian for me.			
<input type="checkbox"/> Share decision-making with my parent(s)/guardian(s) or willing adult.			
<input type="checkbox"/> Delegate continued decision-making to my parent(s)/guardian(s) or other willing adult.			
_____ (Name of willing parent/guardian/adult, if applicable)			
<input type="checkbox"/> will sign			
<input type="checkbox"/> will sign			
<input type="checkbox"/> will sign			
<input type="checkbox"/> will sign			
<input type="checkbox"/> 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

 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 and signature.

[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=h83kgBPv3zSL2BOE1NzBgIBdak8vdcgYwp2OGirsP1pHRrcjPDsDPDAJE9YuYJgYR7QKw7ibVucblVBbA%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 x

 donotreply@specialeducation.powerschool.com
to me

11:41 PM (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=zTzgOeRkFnedSu7JzstdaZkaAWE2GyopL1uxal2vyOM4%2Bgs2upPjo%2B7yZ5oPug2PYa%2FHgTgjdLTMV8zRdVRYA%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

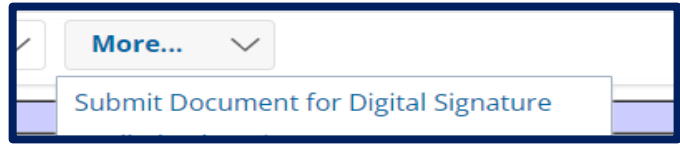
- **Check** signers/signature status.
- **Restart** Signature Request.
- **Accept** with Pending or Current Signatures.
- **Edit** a Signer's Response.
- **Void** a Signer's Request if all signers have NOT signed the document.
- **Send** Signed Document and Certificate of Completion.
- **Sign Now**
-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




More... ▾
Submit Document for Digital Signature

Status
Sent
Auto responded
Delivered
Declined
Voided
Signed
Completed
Unsigned



More... ▾
View Digital Signature Details (Sent)



More... ▾
View Digital Signature Details (Completed)

Digital Signature Details

Restart Signature Request	<ul style="list-style-type: none">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 <u>void the signature request.</u>
Edit a Signer's Response	<ul style="list-style-type: none">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.	<p>By default, the first signer is assigned the primary signer status.</p> <ul style="list-style-type: none">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	<ul style="list-style-type: none">To review the consent answers for all parents and guardians who have completed the signing process.

Digital Signature Details Examples

Digital Signature Details

Document:
(Document will be available for download once signing is complete)

Submitted By:
ADMIN (C:Robyn as Security Administrator) on 04/12/2024 Fri, 02:23 PM

Validate Identity	Sign Now	Signer Roles	Signer Name	Email Address	Status	Options
<input type="checkbox"/>	Sign Now	Name Lookup1	[Redacted]	[Redacted]	Unsigned	

Signature Request Options [v] Close

Digital Signature Details

Document:
(Document will be available for download once signing is complete)

Submitted By:
ADMIN (C:Robyn as Security Administrator) on 04/12/2024 Fri, 02:23 PM

Validate Identity	Sign Now	Signer Roles	Signer Name	Email Address	Status	Options
<input checked="" type="checkbox"/>	Sign Now	Name Lookup1	[Redacted]	[Redacted]	Unsigned	

Accept current signatures

Restart digital signature request

Void digital signature request

Refresh

Signature Request Options [v] Close

Digital Signature Details

Document:
School Age IEP fo [Redacted].pdf

Certificate:
Certificate of Completion (School Age IEP).pdf

Submitted By:
ADMIN (C:Robyn as Security Administrator) on 04/12/2024 Fri, 01:01 PM

Status:
Completed on 04/12/2024 Fri, 01:48 PM

Signer Roles	Signer Name	Email Address	Status	Options
Special Education Teacher	[Redacted]	[Redacted]	Signed on 04/12/2024	[...]
Staff Signature	[Redacted]	[Redacted]	Signed, Opted Out on 04/12/2024 Fri, 01:05 PM	[...]

Save as primary signer

Send signed document

Send certificate of completion

Edit the signer's response

Signature Request Options [v] Close

Digital Signature Details

Document:
School Age IEP fo [Redacted].pdf

Certificate:
Certificate of Completion (School Age IEP).pdf

Submitted By:
ADMIN (C:Robyn as Security Administrator) on 04/12/2024 Fri, 01:01 PM

Status:
Completed on 04/12/2024 Fri, 01:48 PM

Signer Roles	Signer Name	Email Address	Status	Primary Signer	Options
Special Education Teacher	[Redacted]	[Redacted]	Signed on 04/12/2024 Fri, 01:04 PM	Yes	[...]
[Redacted]	[Redacted]	[Redacted]	Signed, Opted Out on 04/12/2024 Fri, 01:05 PM		[...]

Save as primary signer

Send signed document

Send certificate of completion

Edit the signer's response

Signature Request Options [v] Close

How-To: Digital Signature Documents Utility

Administration > Utilities > Students > Digital Signature Documents

The screenshot shows the 'Special Programs' application interface. At the top, there is a navigation bar with icons for Search, Curriculum, Assessment, Communication, Reporting, and Administration. Below this, a 'Data Utilities:' dropdown menu is set to 'Students'. A 'Select Utility:' dropdown menu is open, displaying a list of utilities. The 'Digital Signature Documents' utility is highlighted in yellow. Other utilities listed include 'Replace Student Fields', 'Deactivate Student Profiles', 'Queue Inactive Student Profiles for Archiving and Removal', 'Delete Student Profiles', 'Reactivate Student Profiles', 'Search Student Profile Archive', 'Restore Student Profile from Backup Database', 'Merge Student Profiles', 'Create Documents in Bulk', 'Create Workflow Cases in Bulk', 'Update Workflow Cases in Bulk', 'Convert File-Based Documents', 'Purge Documents from Sandbox', and 'Student Transfer Utilities' (Send Student Transfer Envelope, Receive Student Transfer Envelope).

The screenshot shows the 'My Home Page' in the 'Special Programs' application. The navigation bar is the same as in the previous screenshot. Below the navigation bar, there is a 'Quick Access' section with a search bar for 'Search Student: type name or ID'. Underneath, there are three expandable sections: 'Students Recently Worked With' (listing students like Aadam, Estefanie [201400040], Adams, Hank [76872], Aamold, Carrie [201210295], Abraham, Acelyn [594799], Abella, Hannah [76902], and Abella, Abhilash [586181]), 'Templates Recently Worked With' (listing 'School Age IEP' and '(Other Templates...)'), and 'Administrative Tasks' (listing 'Configure School Year: 2022-23, MP3', 'Manage Digital Signature Documents', and 'Access Consultant Notes'). At the bottom, there is an 'Unread Messages (0)' section with the text 'There are no unread messages'.

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

Student	Document	Initiator	Status	Status Date	Options
Gary Danger	School Age IEP	ROBERTS (Taylor Roberts)	Sign Now	4/8/2024	⋮
Gary Danger	School Age IEP	ADMIN (Security Administrator)	Completed	4/5/2024	⋮
Eric Danger	Evaluation Report	ADMIN (Cindy Wilson (WILSON) as System ADMIN Role)	Completed	3/20/2024	⋮
Nick Danger	School Age IEP	BROCK (Susan Brock)	Completed	3/18/2024	⋮
Gary Danger	School Age IEP	ADMIN (Taylor Roberts (ROBERTS) as System ADMIN Role)	Completed	3/18/2024	⋮

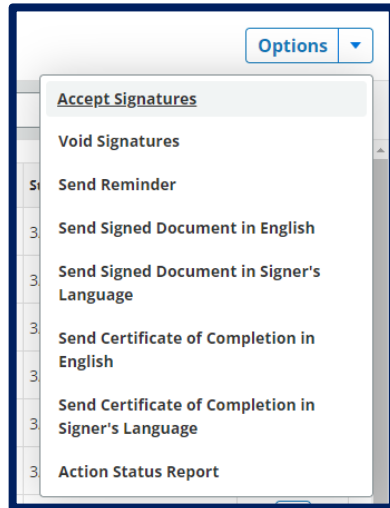
- Accept Signatures
- Void Signatures
- Send Reminder
- Send Signed Document in English
- Send Signed Document in Signer's Language
- Send Certificate of Completion in English
- Send Certificate of Completion in Signer's Language
- Action Status Report

Setup for Bulk Actions

Select filter type

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

How-To: Assign Bulk Actions



Special Programs

Digital Signature Documents - Accept Signatures

Student Needs My Signature

<input type="checkbox"/>	Student	Document	Initiator	Status	Status Date
<input type="checkbox"/>	JD TEST	School Age IEP	CONSULTANT (PowerSchool - Rudranath Karmakar)	Sent	4/3/2024
<input type="checkbox"/>	Bob Brown	School Age IEP	CONSULTANT (PowerSchool - Lalitha D)	Sent	3/25/2024
<input type="checkbox"/>	Sally Student	School Age IEP	ADMIN (C:bsushmitha as Security Administrator)	Sign Now	2/27/2024
<input type="checkbox"/>	KPEA Student	Notice of Recommended Educ. Placement (NOREP)	CONSULTANT (PowerSchool - Lalitha D)	Sign Now	2/12/2024
<input type="checkbox"/>	Tester Skidmore	School Age IEP	ADMIN (C:Robyn as Security Administrator)	Sent	2/8/2024
<input type="checkbox"/>	Mikkee Test	School Age IEP	CONSULTANT (PowerSchool - Mikejerome Salarda)	Sent	12/5/2023
<input type="checkbox"/>	Warren Student2	Positive Behavior Support Plan	ADMIN (C:bsushmitha as Security Administrator)	Sign Now	11/16/2023
<input type="checkbox"/>	Zade test	Section 504 - Plan	CONSULTANT (PowerSchool - Josh Rezentes)	Sent	10/27/2023
<input type="checkbox"/>	Training Dan	Permission to Evaluate	ADMIN (C:RudranathK as Security Administrator)	Sent	10/12/2023

Select All Filtered Records 0 Documents Selected

- *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

Special Programs Search Curriculum Assessment Communication Reporting Administration

Digital Signature Documents Options

Student

Student	Document	Initiator	Status	Status Date
Molly Sage	Evaluation Report	ADMIN (Cindy Wilson (WILSON) as System ADMIN Role)	Completed	3/9/2023
Estefanie Aadams	School Age IEP	CONSULTANT (PowerSchool - Robyn Skidmore)	Sent	3/9/2023
Gary Danger	Evaluation Report	ADMIN (Janeen Mathews (MATHEWS) as System ADMIN Role)	Completed	3/2/2023

- Accept Signatures
- Void Signatures
- Send Reminder
- Send Signed Document in English
- Send Signed Document in Signer's Language
- Send Certificate of Completion in English
- Send Certificate of Completion in Signer's Language
- Action Status Report

← Digital Signature Documents

Action Status Report

Date Submitted =

Action Taken	Submitted By	Documents Impacted	Signers Impacted	Completed	Errored	Aborted	Abort Action
Accept Signatures	CONSULTANT (PowerSchool - Robyn Skidmore)	1		1	0	0	

- Date Submitted
- Action Taken
- Submitted By
- Documents Impacted
- Signers Impacted
- Completed
- Errored
- Aborted

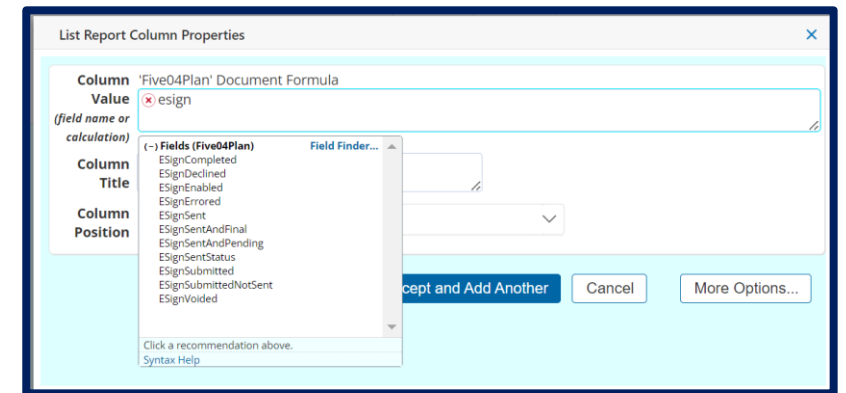
Digital Signature: Reporting

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.





PowerSchool

Thank you for your Partnership!

