

**Welcome to the Unified Talent  
PowerSchool PowerUp!**



**January 2023**

# Today's Agenda

- Welcome
- Your EIC Talent Team
- How to use your Talent EIC Team
- PowerUps
- Breakout Rooms
  - Applicant Tracking
  - Employee Records
  - Perform
  - SmartFind Express



# Your Talent Education Impact Consultant Team



**Sean Vair**

**Experience:**

Classroom Teacher / Dept Coord  
*11 Years*

Educational Technology  
*7 Years*

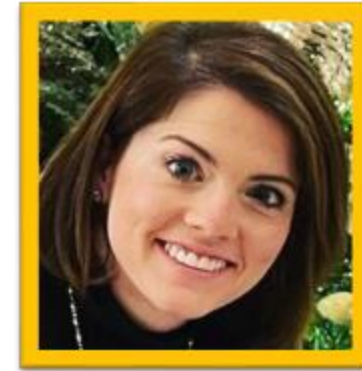


**Stuart Aron**

**Experience:**

Teacher & Coach  
*32 Years*

Educational Technology  
*3 Years*



**Cortnie Shaffer**

**Experience:**

Classroom Teacher  
*5 Years*

Assistant Principal  
*3 Years*

# Your Talent Education Impact Consultant Team



**Patrick Woodford**

**Experience:**

PowerSchool Support and Success  
*5 Years*



**Edie Smith**

**Experience:**

Administrative & Onboarding  
*2 Years*

K-12 HR Software Administrator  
*4.5 Years*



**Marissa Gonzalez**

**Experience:**

Teacher and Specialist  
*9 Years*

District Level  
*8 Years*

*Ed Tech*  
*1 Year*

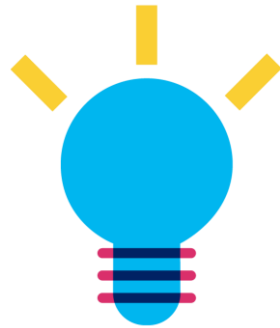
# How to Use your Talent EICs

- 1 Talent PowerUps
- 2 Discuss Best Practices
- 3 Targeted How-To's
- 4 Preparing for Out-of-the-Box usage

# PowerSchool PowerUps



**Recurring meeting with  
PowerSchool Education  
Impact Consultants**



**Learn about recent  
product releases,  
roadmap, &  
integrations**



**Hear from PowerSchool  
experts on seasonal,  
best practice topics.**



**Collaborate, network,  
and share best practices  
with other  
PowerSchool districts**



# Best Practices

- Usage of a system
- Encourage adoption of the system
- Institute new district policies



# Targeted How-To's

- "I need help remembering how to . . ."
- "Is it possible to . . ."
- "Is there a faster way to . . ."







# Preparing for Out-of-the-Box Use

- Is there a standard way of doing this?
- What are the consequences of breaking best practice?
- Can we change our processes to get better results?



# Breakout Room Topics

## Applicant Tracking

- Preparing for Job Fairs & Career Days

## SmartFind Express

- Tools for Managing Substitutes

## Employee Records & Onboarding

- (Product) New Notification for Submitted Documents

## Perform

- Processes for Classified Staff Evaluations

# Applicant Tracking

Preparing for Job Fairs & Career Days

# Agenda

- 1 Benefit and Overview of Career Days
- 2 Benefit and Overview of Job Fairs
- 3 Discuss Implementation and Usage
- 4 Q&A

# Benefits of Career Days Feature



Allows you to schedule and manage many interviews over a set period



Great way to open available district positions up to interested candidates

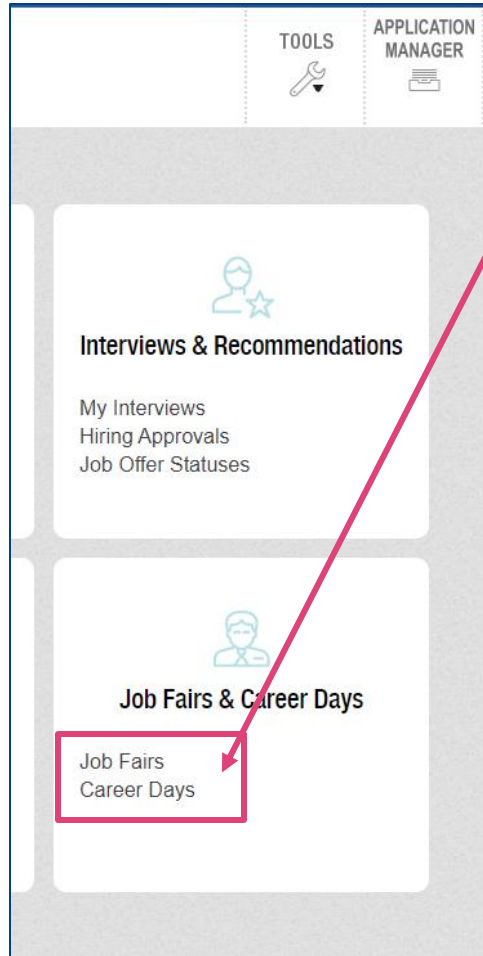


Interested candidates can pursue a connection with HR and or hiring administrators



Long-term documentation of candidate and interview information

# Career Days Overview



The **Career Days** and **Job Fairs** Features are found in the tools section of ATS.

### CAREER DAYS

Career Day Name	Date	Visibility	Filled Slots	Total Slots	Invitations Sent			
<input type="checkbox"/> Example Career Day	03/26/2023	Public	3	32	2	MANAGE RECRUITS	CLONE	EDIT

DELETE SELECTED CANCEL NEW CAREER DAY

Within **Career Days** you can record historical data such as:

The name

The date

The visibility

Interview slots that were filled

Total interview slots

How many invitations were sent for candidates to interview at the career day



# Career Days Overview: Managing Recruits

Once created you are ready to Manage Recruits

**CAREER DAY: EXAMPLE CAREER DAY** EDIT VIEW SCHEDULE

MY SCHEDULED INTERVIEWS ALL SCHEDULED INTERVIEWS INVITED

Q

Name	Email	Interviewer	Time	Invited	Score		
<input type="checkbox"/> Cortnie Shaffer	Cortnie.e.shaffer@gmail.com	Edie Smith	9:00AM	No		<span>INTERVIEW DETAILS</span>	<span>LAST APPLICATION</span>
<input type="checkbox"/> Edie Smith	edie.smith@powerschool.com	Edie Smith	12:00PM	Yes		<span>INTERVIEW DETAILS</span>	
<input type="checkbox"/> Applicant Three		John Hoffman	8:05AM	No		<span>INTERVIEW DETAILS</span>	<span>LAST APPLICATION</span>

1

EXIT REMOVE SELECTED INTERVIEWS SCHEDULE AN EXISTING CANDIDATE INVITE A NEW CANDIDATE  
INVITE EXISTING CANDIDATES

Invitations Sent

2 MANAGE RECRUITS CLONE EDIT

DELETE SELECTED CANCEL NEW CAREER DAY

With this feature you can:  
[Schedule an Existing Candidate](#)  
[Invite a New Candidate](#)  
[Invite an Existing Candidate](#)



# Career Days Overview: Candidate Scheduling

After a candidate receives an invitation or a career day is posted to the candidate portal, candidates will be able to select the time of interview they prefer.

The screenshot shows a user interface for a career day. At the top, there are two red buttons: "Job Listings" and "FAQ". Below this is a section titled "Example Career Day" with a pink underline. Underneath, it says "Career Day Details" and lists the following information: Location: (blank), Date: 03/26/2023, Type: Elementary, Time: 8:00 AM - 4:00 PM, and Description: (blank). Below the details is a question "Ready to Schedule an Interview?" followed by two buttons: "Schedule Interview" and "Cancel". To the right of the details is a box titled "About Career Days" with a pink underline. It contains two paragraphs of text explaining the purpose of career days and providing instructions on how to cancel a scheduled interview.

**Example Career Day**

**Career Day Details**

Location:

Date: 03/26/2023

Type: Elementary

Time: 8:00 AM - 4:00 PM

Description:

**Ready to Schedule an Interview?**

**About Career Days**

Career days provide you with the opportunity to interview with the District at the date and time specified for this career day. When you are ready, you can click "Schedule an Interview" and select from the remaining available times. Available times may change as other candidates fill those available slots.

If you need to cancel a scheduled career day interview, please contact the District immediately so that another candidate may fill your spot.

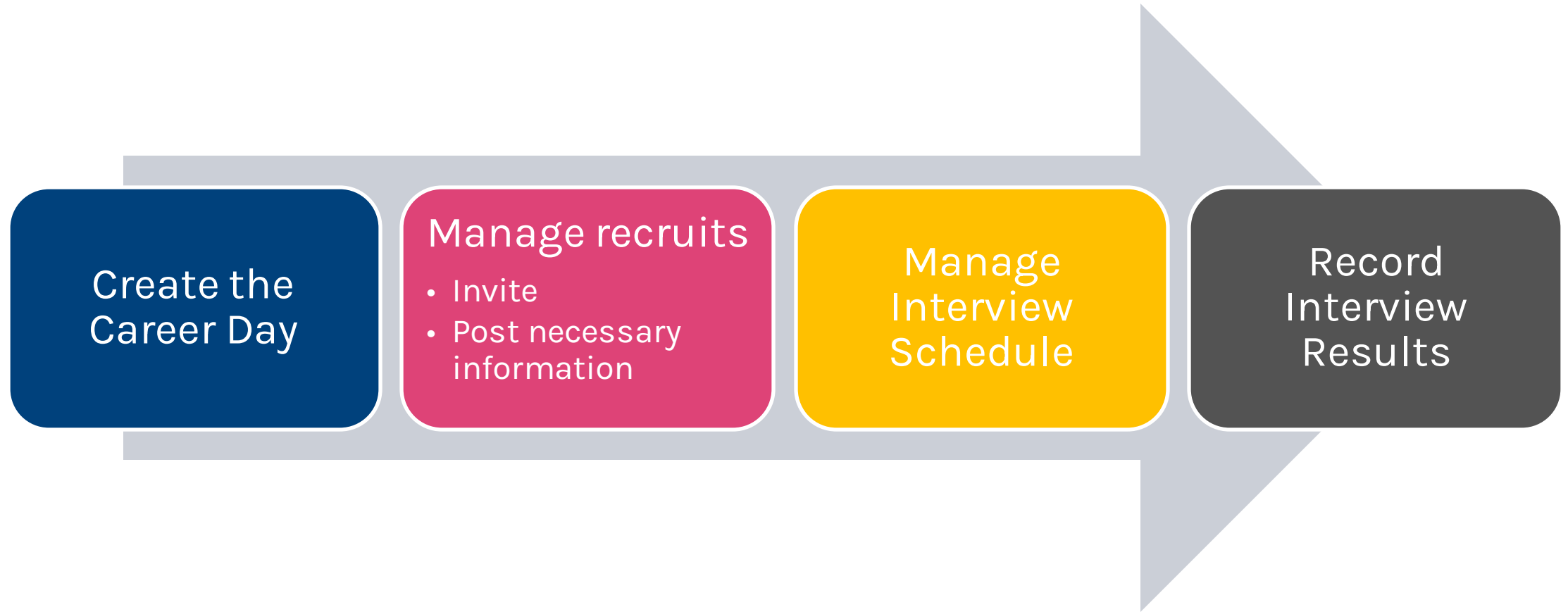
The screenshot shows an administrator interface for managing career days. At the top, it says "CAREER DAY: EXAMPLE CAREER DAY" with an "EDIT" button. To the right is a "VIEW SCHEDULE" button. Below this are three tabs: "MY SCHEDULED INTERVIEWS", "ALL SCHEDULED INTERVIEWS", and "INVITED". There is a search bar with a magnifying glass icon. Below the search bar is a table with the following columns: Name, Email, Interviewer, Time, Invited, and Score. The table contains one row for Cortnie Shaffer. To the right of the table are two buttons: "INTERVIEW DETAILS" and "LAST APPLICATION".

**CAREER DAY: EXAMPLE CAREER DAY**

Name	Email	Interviewer	Time	Invited	Score
<input type="checkbox"/> Cortnie Shaffer	Cortnie.e.shaffer@gmail.com	Eddie Smith	9:00AM	No	

Administrators can access the scheduled interviews and view all interview details through the **Manage Recruits** feature

# Career Days Overview: Review



# Benefits of Job Fairs Feature



Instant email communication with the candidate



Candidate has easy access to ATS postings



The application can be done on candidate's time



HR can easily see how effective a job fair was based on invitations and applications



Recruiter can record initial thoughts about their meeting

# Overview of Job Fairs

The only required information when creating a job fair is the name and date



JOB FAIRS			
<input type="text"/>			
Job Fair Name	Date ▼		
<input type="checkbox"/> Sample Job Fair	10/03/2008	<b>MANAGE RECRUITS</b>	<b>JOB FAIR DETAILS</b>
1			
		<b>DELETE SELECTED</b>	<b>EXIT</b> <b>NEW JOB FAIR</b>

### EDIT JOB FAIR

**General Information**

Job Fair Name\*

Date\*  /  / 23

**Location**

Location

Address

Addr Line 2

City

State ▼

Zip

**On-Site Job Fair Contact**

Contact Name

Phone

Fax

E-mail

**Additional Information**

District Rep Hoffman, John **SELECT** **REMOVE**

Notes about this Fair

**CANCEL** **SAVE**

# Overview of Job Fairs: Add Recruits

**ADD RECRUIT TO SAMPLE JOB FAIR** RESET FORM

**Recruit Information**

Email\*

First Name\*

Last Name\*

Phone Number

Certification Area

Initial Password\*

Initial Password Confirm\*

Email Subject Invitation to apply with Cortnie Shaffer Sandbox

[Select Email from Template](#)

Email Message

**HR Information**

Recruit Score\*

Verbal Offer Made

Your Notes

CANCEL SAVE AND SEND INVITATION SAVE

- You can create a profile or link an already existing profile **immediately** to the candidate
- **Invitations to apply** with the district can be sent out upon saving candidate information
- Record **first impressions** and provide notes
- Form resets immediately after a candidate is recorded

# Overview Of Job Fair: Invitation to Apply

Invitation to Apply with Cortnie Shaffer Sandbox

## Invitation to Apply with Cortnie Shaffer Sandbox

Cortnie,

It's easy to apply for a position with Cortnie Shaffer Sandbox.

1. Visit our web site link below and select a job.
2. Click "Apply Now".
3. Login using the username provided below and your password. If you do not have a password, use the "Forgot Password" option to create a new password.

You will then be able to complete our online job application. Once you have completed your application, it's easy to apply for additional positions.

Username: cortshaffer

Our Web Site: <https://shaffersandbox.tedk12.com/hire>

Sincerely,

Cortnie Shaffer Sandbox

[Cortnie Shaffer Sandbox](#)

Powered by [PowerSchool Unified Talent™](#) Applicant Tracking

[Log Into TalentEd Recruit & Hire](#)

# Overview of Job Fairs: Managing Recruits

MANAGE RECRUITS: SAMPLE JOB FAIR

Cancel ADD RECRUITS

ALL APPLIED INVITED NOT INVITED

Last Name	First Name	Status	Average Score	Certification Area	Notes	View
Smith	Charlie	Applied	5	5-9 Mathematics	RECRUIT NOTES	VIEW APPLICATION(S)
Shaffer	Cortnie	Applied	5	K-8 Advanced Principal	RECRUIT NOTES	VIEW APPLICATION(S)

1

Cancel ADD RECRUITS

Recruits who completed application

- View Application
- View Notes

MANAGE RECRUITS: SAMPLE JOB FAIR

Cancel ADD RECRUITS

ALL APPLIED INVITED NOT INVITED

Last Name	First Name	Status	Average Score	Certification Area	Notes	Invite
Shaffer	Cortnie	Invited	5	K-12 School Counselor	RECRUIT NOTES	REINVITE RECRUIT

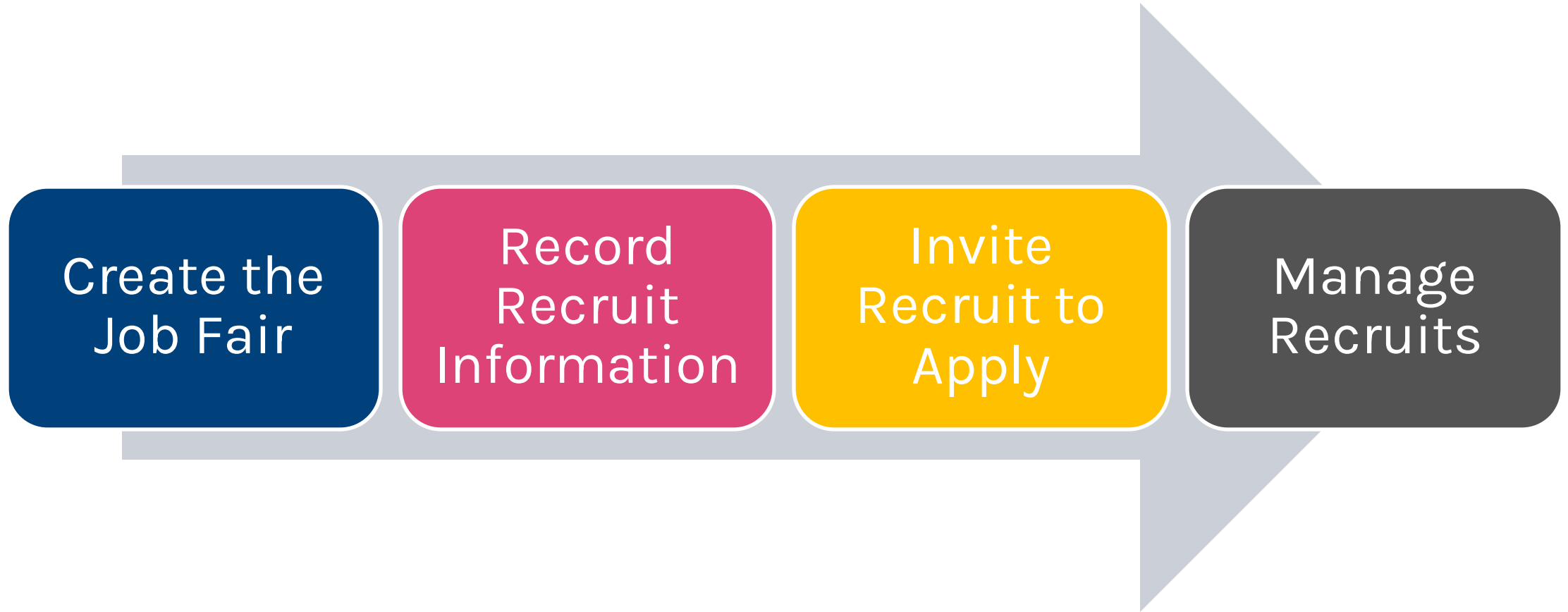
1

Cancel ADD RECRUITS

Recruits who have not completed an application

- View Notes
- Reinvite the recruit

# Overview of Job Fairs: Review







PowerSchool

# PowerUPs

## Unified Talent Employee Records

### New Notification when Documents are Submitted

January 2023



# Agenda

- Introductions
- Quick Notification Overview
- Document Submitted Notification
- Demo
- When can I get this?
- Q & A

- My Tasks
- Available Forms
- Files
- Filing
- Contracts and Letters
- Reports
- Configuration**

## Notifications

Notification Type	Enabled		
Checklist - Auto Reminder	<input checked="" type="checkbox"/>	Edit	Preview
Checklist - New Checklist	<input checked="" type="checkbox"/>	Edit	Preview
Checklist - New Tasks	<input checked="" type="checkbox"/>	Edit	Preview
Checklist - Reminder	<input checked="" type="checkbox"/>	Edit	Preview
Contract - Signature Required	<input checked="" type="checkbox"/>	Edit	Preview
Document - Requested	<input checked="" type="checkbox"/>	Edit	Preview
Document - Submitted	<input checked="" type="checkbox"/>	Edit	Preview
Documents - Due	<input checked="" type="checkbox"/>	Edit	Preview
Documents - Expirations	<input checked="" type="checkbox"/>	Edit	Preview
Security - Forgot Password	<input checked="" type="checkbox"/>	Edit	Preview
Security - Send Password	<input checked="" type="checkbox"/>	Edit	Preview
Workflow - Approval Denied	<input checked="" type="checkbox"/>	Edit	Preview
Workflow - Approval Required	<input checked="" type="checkbox"/>	Edit	Preview
Workflow - Review Required	<input checked="" type="checkbox"/>	Edit	Preview
Workflow - Revision Required	<input checked="" type="checkbox"/>	Edit	Preview
Workflow - Signature Required	<input checked="" type="checkbox"/>	Edit	Preview
Checklist - Action Required: New Hire Documents	<input checked="" type="checkbox"/>	Edit	Preview

Add New Template

Delete

# Configuration > Notifications

Used to send email notifications as certain events happen in Records.

Preview lets you see the wording in a notification.

Edit lets you change wording and data to be included in a notification.

Enable checkbox enables/disables the notification. Uncheck this if a notification is not needed.

Customize notifications around checklists as needed.

- My Tasks
- Available Forms
- Files
- Filing
- Contracts and Letters
- Reports
- Configuration**

### Notifications

Add New Template

Notification Type	Enabled			
Checklist - Auto Reminder	<input checked="" type="checkbox"/>	Edit	Preview	
Checklist - New Checklist	<input checked="" type="checkbox"/>	Edit	Preview	
Checklist - New Tasks	<input checked="" type="checkbox"/>	Edit	Preview	
Checklist - Reminder	<input checked="" type="checkbox"/>	Edit	Preview	
Contract - Signature Required	<input checked="" type="checkbox"/>	Edit	Preview	
Document - Requested	<input checked="" type="checkbox"/>	Edit	Preview	
<b>Document - Submitted</b>	<input checked="" type="checkbox"/>	Edit	Preview	
Documents - Due	<input checked="" type="checkbox"/>	Edit	Preview	
Documents - Expirations	<input checked="" type="checkbox"/>	Edit	Preview	
Security - Forgot Password	<input checked="" type="checkbox"/>	Edit	Preview	
Security - Send Password	<input checked="" type="checkbox"/>	Edit	Preview	
Workflow - Approval Denied	<input checked="" type="checkbox"/>	Edit	Preview	
Workflow - Approval Required	<input checked="" type="checkbox"/>	Edit	Preview	
Workflow - Review Required	<input checked="" type="checkbox"/>	Edit	Preview	
Workflow - Revision Required	<input checked="" type="checkbox"/>	Edit	Preview	
Workflow - Signature Required	<input checked="" type="checkbox"/>	Edit	Preview	
Checklist - Action Required: New Hire Documents	<input checked="" type="checkbox"/>	Edit	Preview	Delete

# Document Submitted

**Optional** notification sent whenever a document has been submitted.

# Best Practices

Recommended	Not Recommended
Financial forms	Forms that are regularly submitted on behalf of an employee. This may cause confusion that someone is filling in data without their knowledge.
Sensitive forms	
Other forms where you want to give your employees a confirmation notice once they've submitted a form.	

# Configuration > Documents

Unified Talent  
Employee Records

My Tasks

Available Forms

Files

Filing

Contracts and Letters

Reports

Configuration

## Edit Document

Settings Workflow

### Bank Deposit Details

Please provide a name for this Document.\*

Bank Deposit Details

This Document will be associated with the following E-Form.\*

Direct Deposit Authorization

Allow staff to upload a file to submit this Document in lieu of completing an E-Form?\*

-- No --

Should this document be a Blank Form/Blank Doc? (Choose this option if you allow staff to initiate a submission of this Document.)\*

-- Do Not Allow Blank Form Requests --

Send notification when "Save Final" is clicked on the form (recommended for forms with financial or sensitive data).

This document expires on

Notification must be enabled for any document you wish to turn this on for!

Staff Member

Demographics Job Types Direct Reports Supervisors

Demographic Info

First Name\* :  
Jacqueline

Middle Name :

Last Name\* :  
Adams

Employee ID :  
JA10101

Email\* :  
Jacqueline.Adams@mailinator.com

Personal Email :  
Jacqueline.AdamsP@mailinator.com

Primary Location\* :  
Dogwood Elementary School

Phone Number :  
555-555-5555

# Notifying Employees

The employee who the form is for will ALWAYS receive the notification.

- Includes filling in a form “on behalf of” employee
- Includes Impersonation

For Security purposes, an email will be sent to **BOTH** the email and Personal email address for the staff member.



# Files > [Contact Log]

Unified Talent  
**Employee Records**

My Tasks  
Available Forms  
Files  
Filing  
Contracts and Letters  
Reports  
Configuration

**Files**

**Sophie Adams** [Edit Staff](#) [Impersonate](#)

Employee ID: SA10543 Primary Location: Maintenance Office  
Job Type: Maintenance Supervisor: Patricia Peterson Email: [Sophie.Adams123@mailinator.com](mailto:Sophie.Adams123@mailinator.com)

Folders and Checklists File List **Contact Log**

Contact Date	Contact Time	Email Subject	
01/05/2023	07:31 AM	Document Submitted - Direct Deposit Authorization - TalentEd	<a href="#">View</a>
01/05/2023	07:31 AM	PowerSchool Records - Signature Required - TalentEd	<a href="#">View</a>

1-2 of 2 Results

Navigation: << < 1 > >>

Results Per page: 10

Go to page: 1

“Document Submitted” notification included in the list.

# Demo

... the good stuff

# Resources & Timelines

... helping you get the job done!

# When can I start using this feature?

February Release (TED 23.2): *tentatively* scheduled for **February 5th**

# Additional Resources: Product Article on this Feature

The screenshot shows the PowerSchool Community website interface. At the top, there is a navigation bar with the PowerSchool logo and the text 'PowerSchool Community'. Below this, there are several menu items: 'Product Support', 'Product Roadmap', 'Services', 'Contact Support', 'Our Community', 'Events Hub', and 'PeopleAdmin'. On the right side of the navigation bar, there are icons for notifications (with a '63' badge), email, and a profile picture.

The main content area has a blue header with the text 'Employee Records Knowledge Bases'. Below this header is a search bar with a dropdown menu labeled 'This category' and a search input field with the placeholder text 'Search here'. Below the search bar, there is a breadcrumb trail: 'PowerSchool Community > Employee Records Knowledge Bases' and an 'OPTIONS' dropdown menu.

The main content area is divided into several sections:

- Knowledge Base Articles:** A section with a sub-header 'Knowledge Base Articles' and a description: 'Click on **Records** below to view all articles. You'll also find **Filters** to help narrow down your search.'
- Discussion Forums:** A section with a sub-header 'Discussion Forums' and a description: 'Navigate to the Records Forum to start a discussion and use **Options** and **Subscribe** to receive updates and notifications.'
- Contact Support:** A section with a sub-header 'Contact Support' and a description: 'Authorized contacts can visit the Case Portal to log a case with Support. For performance disruption updates click here to read more.'
- Important Articles:** A section with a sub-header 'Important Articles' and a list of articles: 'Employee Records New Look And Feel - Reference Guide', 'Records: How to find users using the new quick search for Admins.', 'Records: Contract Tab Temporarily Unavailable for all Users', 'Video: How to Reset Community Password', 'Getting Started on PowerSchool Community', 'How to Launch Chat Support', 'Subscriptions and Notifications', and 'Can't find what you are looking for? Here are some Search tips to help!'.
- Top Contributors:** A section with a sub-header 'Top Contributors' and two contributors: 'ashleyjohann' and 'AnnieZager'.

A red box highlights the 'Knowledge Base Articles' section, which contains a sub-section titled 'Employee Records Knowledge Base (133 Articles)'. This sub-section lists several articles: 'Q & A: Does PowerSchool update the I-9's...', 'Data Import Tool Sync Formatting...', '"String was not recognized as a valid...', 'Terminated Employees Sent from...', and 'Checklists: Ignore and Restore Options'.

# Strategic Solution Consulting



- New System Training
- Setting up Security Levels
- Notifications
- Review Data Import
- Integrations
- Full Solution Review
- Reporting
- Available Forms
- Contracts
- Monthly Check-Ins

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# Perform

Processes for Classified Staff Evaluations

# Agenda

- 1 **Considering Classified Evaluations**
- 2 **Options for Setting up Processes**
- 3 **Automation**
- 4 **Assigning Processes**
- 5 **Q&A**

# Considering Classified Evaluations

- Are you planning to use Perform for your classified staff evaluations for the first time?
- Are you already using and would like to change how your processes are assigned?



# Options for Setting up Processes

Using a Form Category

Restricting Job Types

Setting up Automation



# Using a Form Category in a Process

- When setting up a **Form** in a processes, a **Category Group** can be chosen instead of a specific form in **Advanced Settings**
- This allows you to build a generic process, and then the supervisor can choose a specific evaluation form

**Edit Form**

Workflow  
DR Signature SV Signature

Show Scheduling (optional)

Hide Advanced (optional)

Form Select

Form Select

User must choose only this form when completing this Step:

User may choose from any form in this category:

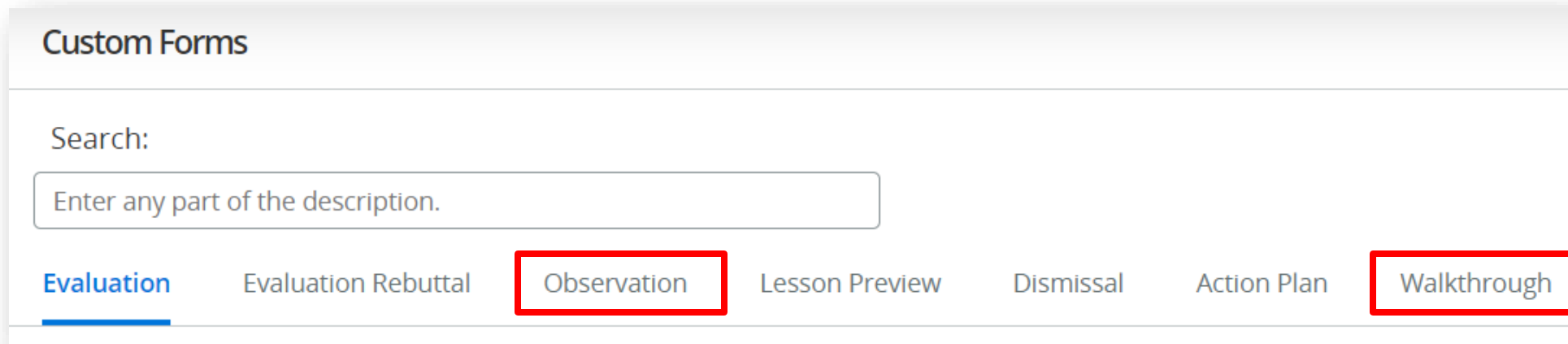
Classified Employee Evaluation

Evaluation Rebuttal

Save Cancel

# More about Form Categories

- If using this process, all options should be under one category
- Not recommended to use the following categories:
  - Observations
  - Walkthroughs



Custom Forms

Search:

Enter any part of the description.

Evaluation Evaluation Rebuttal **Observation** Lesson Preview Dismissal Action Plan **Walkthrough**

# The Supervisor's View

- When the supervisor is accessing the **Evaluation Task**, they have the option to select a form from the list in the category you set:

The image shows a screenshot of a software interface. On the left, there is a grid of buttons arranged in four rows and three columns. The buttons are: Row 1: Mark as Done, Schedule, Assign, Remove; Row 2: Go To Form, Schedule, Assign; Row 3: Mark as Done, Schedule, Assign; Row 4: Select Form, Schedule, Assign. The 'Select Form' button in the bottom-left corner is highlighted with a red rectangular border. To the right of this grid, a modal dialog box is open. The dialog has a title 'Select a Form to Proceed'. Below the title is a dropdown menu labeled 'Form \*' with the text 'Please Select a Form' and a downward arrow. At the bottom right of the dialog are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted in blue.

# Restricting by Job Type

Restricting processes to specific **Job Types** will prevent processes from accidentally being assigned to incorrect staff members

Process

This process applies to the following job types required

<input type="checkbox"/> All	<input checked="" type="checkbox"/> Accountant	<input checked="" type="checkbox"/> Administrative Associate I	<input type="checkbox"/> Assistant Principal
<input type="checkbox"/> Assistant Superintendent	<input type="checkbox"/> Chief Financial Officer	<input checked="" type="checkbox"/> Computer Technician	<input checked="" type="checkbox"/> Food Service Worker
<input checked="" type="checkbox"/> Custodian	<input checked="" type="checkbox"/> Food Service Manager	<input checked="" type="checkbox"/> Maintenance	<input checked="" type="checkbox"/> Paraprofessional
<input checked="" type="checkbox"/> Generalist	<input checked="" type="checkbox"/> Head Custodian	<input checked="" type="checkbox"/> School Bus Driver	<input type="checkbox"/> Substitute
<input type="checkbox"/> New Test Job Type	<input type="checkbox"/> Occupational Therapist	<input checked="" type="checkbox"/> School Nurse	<input type="checkbox"/> Support
<input type="checkbox"/> Principal	<input type="checkbox"/> Psychologist	<input checked="" type="checkbox"/> Supervisor	<input type="checkbox"/> Teacher
<input type="checkbox"/> School Counselor	<input checked="" type="checkbox"/> School Nurse	<input type="checkbox"/> Support	
<input type="checkbox"/> Superintendent	<input type="checkbox"/> Supervisor		
<input checked="" type="checkbox"/> Systems Administrator	<input type="checkbox"/> Teacher		



# Setting up Automation

- **Automation** is the process of gathering a selection of staff members that meet set criteria, so that the selection can be reviewed, and processes can be bulk assigned
- This is set up in **Step 5** of the **Setup Process**

Automation

Step 1 - Description*	Step 2 - Tasks*	Step 3 - Data Transfer	Step 4 - Deadline	<b>Step 5 - Automation</b>
-----------------------	-----------------	------------------------	-------------------	----------------------------

**Add**

Cancel Propagate Changes

# Setting up Automation

- Choosing Criteria
  - There are many options to choose from, so knowing your data and how you will use this in your district is important
  - Pre-planning for how your staff members may move between evaluations will help

The screenshot displays the automation configuration interface. At the top, a criteria rule is defined: '1 Hire Date' with a dropdown arrow, followed by the operator 'GREATER\_OR\_EQUAL' with a dropdown arrow, and the value '07/01/2022' with a calendar icon. A 'Remove' button is located to the right of the date field. Below this, a '+ Add Criteria' button is highlighted with a red box. To its right are radio buttons for 'All criteria are true.' (selected) and 'Any criteria are true.'. A 'Clear' button is positioned to the right of the radio buttons. The section is titled 'When to Run Automation' and includes a 'Nightly' dropdown menu, a slash separator, and two empty dropdown menus for scheduling details.

# Assigning Processes

- Once Automation has run, matching employees will be available for review in the HR Tools > Dashboard
- HR Staff can review the list, exclude as necessary, and bulk assign processes as needed

HR Dashboard

My Folder

HR Tools

Signatures

Configuration

Walkthrough

## Processes Ready to Be Started

Process Name	Process Type	Matching Employees	
Facilities Operations/Maintenance Operations Roles	Evaluation	28	<a href="#">Review List</a>
Non-Campus Based Administrator	Evaluation	5	<a href="#">Review List</a>
TPESS Evaluation (2020 Revision)	Evaluation	5	<a href="#">Review List</a>
Non-Campus/ Non-Instructional Para Professional	Evaluation	3	<a href="#">Review List</a>

# Assigning Processes Manually

- Processes can also be assigned in bulk manually by searching in HR Tools >> Staff
- You can filter by Groups, Job Type, or Location to narrow your search down, then you can bulk assign

The screenshot shows the HR Tools Staff search interface. At the top, there are several filter dropdowns: School Year (2022/2023), Process (All Processes), Job Type (Generalist), Location (All Locations), Groups (All Groups), Min Years of Service (All Years), Max Years of Service (All Years), and Tenure Level (All Levels). Below the filters is a table of employees. The first column of the table contains checkboxes, all of which are checked and highlighted with a red box. The table has columns for Last, First, Employee ID, Job, Start Date, Hire Date, and Tenure Level. Each row has two buttons: 'Start a Process' and 'Folder'. Below the table is a pagination control showing '1' of 4 pages and '15 per page'. At the bottom left, it says '4 Selected | Select All | Clear'. At the bottom right, there is a 'Bulk Action' dropdown menu with a 'Go' button. The dropdown menu is open, showing 'Add Process(es)' as the selected option, and this area is also highlighted with a red box.

<input checked="" type="checkbox"/>	Last	First	Employee ID	Job	Start Date	Hire Date	Tenure Level		
<input checked="" type="checkbox"/>	Cooper	Jose	1897	Generalist	11/22/2011	11/22/2011		Start a Process	Folder
<input checked="" type="checkbox"/>	Cooper	Brianna	1898	Generalist	12/22/2011	12/22/2011		Start a Process	Folder
<input checked="" type="checkbox"/>	Davis	Emily	1908	Generalist	10/22/2012	10/22/2012		Start a Process	Folder
<input checked="" type="checkbox"/>	Ellis	Declan	1917	Generalist	07/22/2013	07/22/2013		Start a Process	Folder



# Demo





PowerSchool



PowerSchool

# SmartFind Express

Tools for Managing Substitutes



# Agenda

**1** Substitute Setup

**2** Priority Lists

**3** Reports

**4** Current Reality

**5** Q&A

# Substitute Setup: Get it correct from the start

- SmartFind Configuration
  - Classification Profiles
  - Classification Groups
  - Location Profiles
  - Location Groups
  - Certifications
  - Unavailable dates
- Substitute Preferences
  - Schedule
  - Locations
  - Classifications



# Priority Lists: It goes both ways<sup>2</sup>

- Building priority
- Building do not call
- Substitute priority
- Substitute do not work

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Priority Lists

Search Criteria

List Type: **Employee Managed** ▼

Subs at/above alert threshold for Do Not Use reason

Classification:  ▼

Location:  ▼

When selecting a group, include locations assigned to the group

Employee:  **Name Lookup**

Substitute:  **Name Lookup**

Entry Date: From  To   
(MM/DD/YYYY) (MM/DD/YYYY)

Sort List by: **Substitute Name** ▼ Then by  ▼

Records Per Page: **50** ▼

**Search** **Create Report** **New** **Export to Excel** **Detailed Export**

Priority List

5 items found, displaying all items.

Delete	Make Inactive	Print Letter	Substitute	Access ID	Entry Date	List of	Reason (Do Not Use)	Classification	Location/Employee	Name	Sub List	Level	Order#
<input type="checkbox"/>			<u>Abbott, Lucy</u>	2222	03/25/2021	Employee Managed			Employee	Nichols, Heather	1	1	4560
<input type="checkbox"/>			<u>Lee, Terri</u>	20127	03/25/2021	Employee Managed			Employee	Nichols, Heather	1	3	4454
<input type="checkbox"/>			<u>Thomas, Aaron</u>	20107	03/25/2021	Employee Managed			Employee	Nichols, Heather	1	4	4434
<input type="checkbox"/>			<u>Thornton, Viola</u>	20103	03/25/2021	Employee Managed			Employee	Nichols, Heather	1	5	4430
<input type="checkbox"/>			<u>Wong, Olivia</u>	20100	03/25/2021	Employee Managed			Employee	Nichols, Heather	1	2	4427

5 items found, displaying all items.

**Delete** **Make Inactive** **Print**

# Reports: Information for informed decisions

- Individual Substitute Reports
  - Profile/Inquiry Reports
- Group Substitute Reports
  - Availability Reports
    - Daily
    - Weekly
  - Substitute Detail Reports
  - Substitute Statistics
  - Substitute with blocked calls
- System Operations menu
  - Communication Log
  - Text message Communication Log

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Report View

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As of Dec 20, 2022 2:27 PM

### Substitute Statistics

Name	Access ID	Call	Acpt	Decl	Hngup	Busy	Ans	Rngbk	Intcpt	Acpt	Decl	Acpt	Decl	Admnd	Prp	Auto	Cnd	Cnd	Last	Last
																				Call@Work
Stephens, Michele	20110	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	12/14/2022
Stokes, Harvey	20155	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	10/31/2022
Stokes, Pauline	20198	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	12/08/2022
Swanson, Latoya	20109	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	12/14/2022
Tate, Rudy	20181	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	12/06/2022
Thomas, Aaron	20107	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	12/13/2022
Thompson, Zachary	20118	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	12/19/2022
Thomson, Viola	20103	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	12/12/2022
Torres, Leah	20120	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	12/16/2022
Townsend, A...	20114	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	12/19/2022

# Current Reality: What are you doing now?

- What information do you input for substitutes?
- How do you prioritize substitutes to call?
- How do locations handle undesirable substitutes?
- How do you proactively make decisions to ensure vacant jobs are filled?
- What processes are you using that are working well?
- What processes need tweaking?





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