PowerSchool

Special Programs DocuSign

Dawn O'Halloran | Product Owner

DocuSign - Overview

This PowerPoint outlines the setup, overview and process of how documents can be signed electronically via DocuSign in the PowerSchool Special Programs application.

DocuSign supports signatures, initials, check box and short text fields. It also supports the ability to have multiple signers. When the first person signs the form, then the form is automatically sent to the next signer via email. After the last required signature is obtained, an email is sent to each contact containing the document with all signatures.

Forms can be configured to sign on Review or Final status.

There is <u>no</u> cost from PowerSchool to use the DocuSign feature. There is a licensing fee from DocuSign. Contact Matthew.hlavaty@docusign.com for pricing.   Contact the PowerSchool support team for assistance on configuration.

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Set up

1. Configuration\IntegrationDocuSign Account

DocuSign Account

DocuSign REST API URL	https://demo.docusign.net/restapi
Integrator Key	f6d407a5-3a5f-43fd-b750-eaf4224c2460
Service User Name	paul.nick@powerschool.com
Password	********
Staff Email Address Field	EmailAddress
Time Zone for API Verified?	Yes
Embedded Signing	Yes
DocuSign-Ready Document Templates	Evaluation Consent Form, Extended Evaluation Form, SLD Determination, Meeting Invitation, Individualized Education Program, IEP Amendment, Placement Consent Form - PL1: 3-5 year old; Manifestation Determination Review, Attendance Sheet, Chapter 688 Student Referral Form, MCAS Accommodation 20 Cover Sheet, Notification of Intent to Seek Approval, Medicaid Notice - Authorization for Release/Exchange of Information, Section 504 - Meeting Notice and Invitation, Section 504 - Plan, Section 504 - Manifestation Determination Review

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Set up

2. School District Representative - Some forms require a district representative.   District Profile\School District Representative.

3. School District Representative Email – Staff Demographics \ Work Email Address

4. Student Contact Email Address – ensure each student contact has a valid email address.

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Set up

5. Form Properties – Configure each form to use DocuSign for student/parent and/or staff signatures. To configure DocuSign, each form must have the behavior setting labeled 'Support DocuSign' and/or 'Staff Support Sign' set to ON. See image on the following slide). Checking the 'Apply to existing non-final documents' check box will implement the DocuSign functionality for all unfinalized forms. Setting the value to On and leaving the 'Apply to existing non-final documents' unchecked, will only use DocuSign for forms created going forward.

Set up

6. Setting DS for Review Status – Log in as a Configurator. Select a Configuration task. Open the form, click More, Configure DocuSign E-Signature. Check 'Allow Submit Review Document'.

DocuSign Process

- Complete the document. Check each contact that will receive the document via DocuSign.

☑ Cheyenne Alexa will sign

1. ☐ **Attendance not necessary**

    a. The above member of the IEP team **is not required** to attend an IEP meeting in whole or in part if;

        i. the parent of a child with a disability and the District agree that the curriculum or related services area **is not** being modified or discussed

<div align="right">OR</div>

2. ☐ **Excusal**

    a. A member of the IEP team **may be excused** from attending an IEP meeting in whole or in part if;

        i. area of curriculum or related services area **is** being modified or discussed

        ii. the parent/guardian and the agency consent in writing; and

        iii. the member submits, in writing to the parents and the team, his or her input to the development of the IEP prior to the meeting

Parent Approval and Signature: _____

☐ Dawn Ohalloran will sign ☐ Jade Alexa will sign

District Representative Approval and Signature: _____
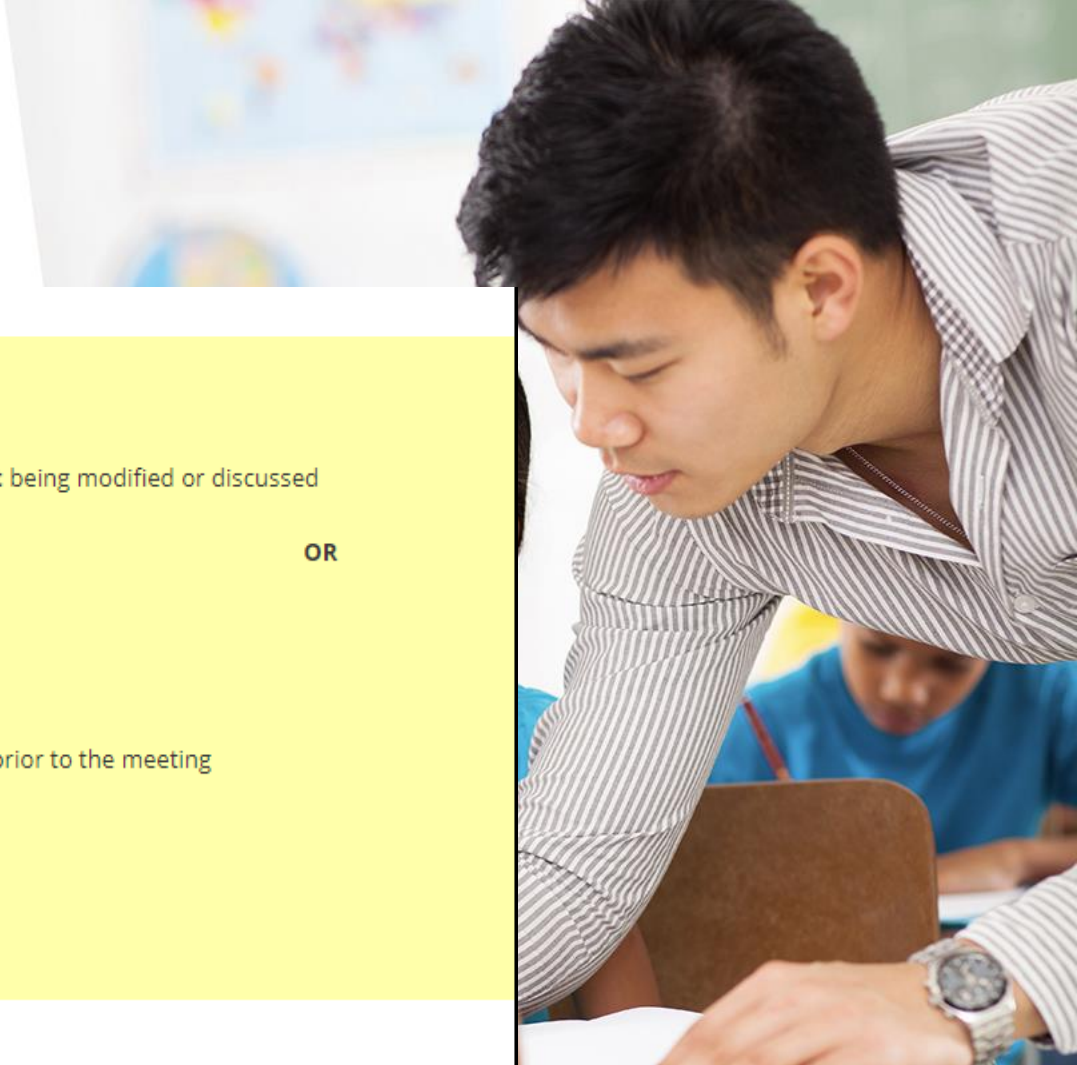
DocuSign Process

- Based on the district administrator defining the DocuSign process, mark the form Review or Finalized.

- Within the form, click More, Submit Document for e-Signature. Complete the document. Check each contact that will receive the document via DocuSign. A listing of contacts appear. Click Submit & Send to Signers Via DocuSign Now.

View DocuSign Status Details

Document: IEP Excusal Form.pdf *(does not include signatures until all are completed)*

Submitted By: CONSULTANT (PowerSchool - Dawn OHalloran) on 06/22/2018 Fri, 02:16 PM

Status: Sent 06/22/2018 Fri, 02:17 PM

Signer Role	Signer Name	Email Address	Status
Parent 1	Cheyenne Alexa	lba817@gmail.com	

Refresh | Enable "Sign Now" | Cancel/Void ESignature

DocuSign Details – user can check Enable "Sign Now" or the contact can access their email to sign the document.

Accessing Doc Via Email

The contact will receive an email in their inbox, sent by the district contact (e.g. Paul Nick). See image on next page.

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DocuSign Process

- Click Review Document.

- DocuSign will guide the email recipient with first checking a box to agree to use electronic records. It will start at the top of the document and guide the signee to sign the applicable areas.
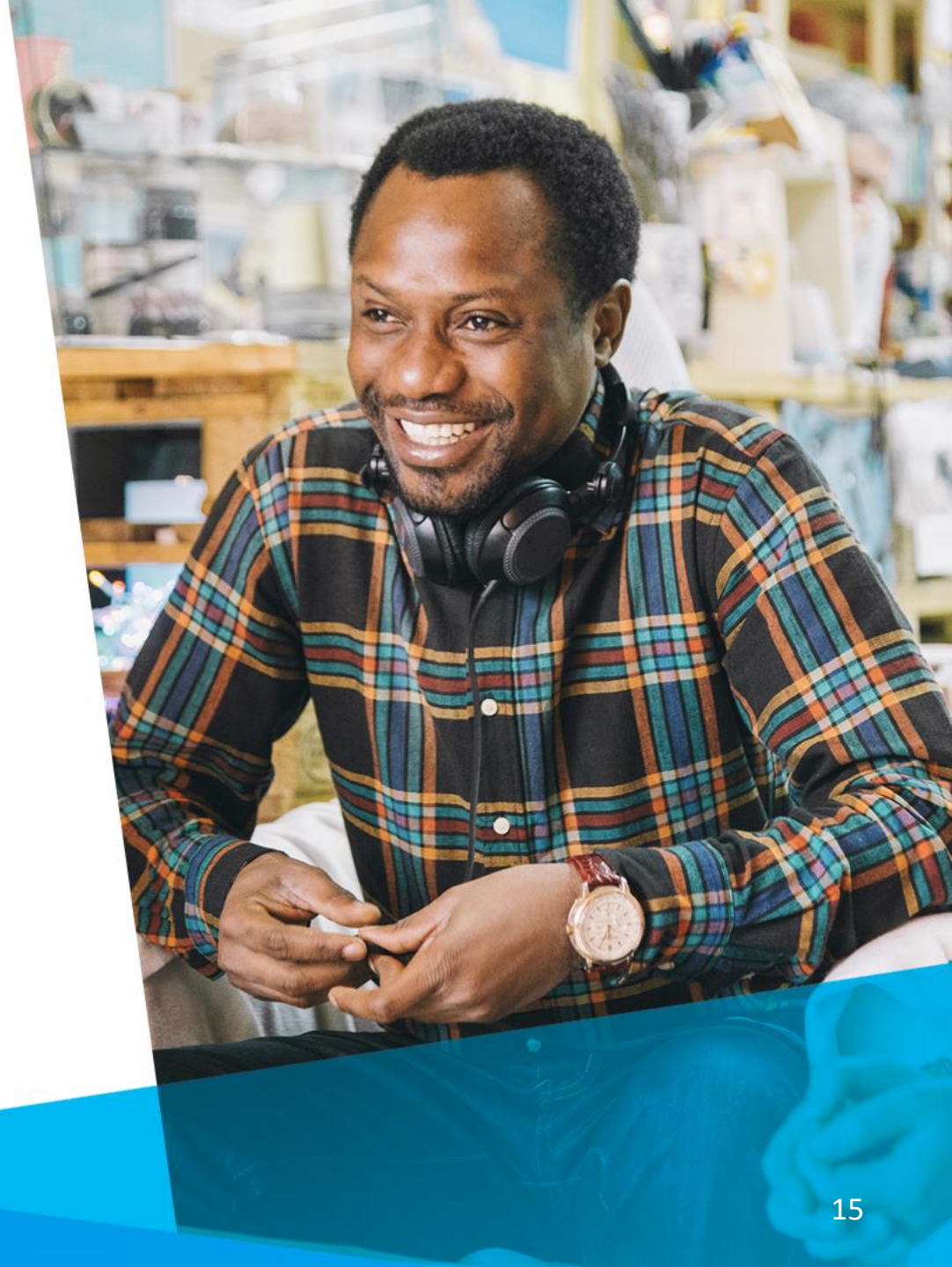
START

DocuSign Envelope ID: 7C90667F-E37F-4F34-A9CB-FF8331726B6E

School District Name: Salem

School District Address: 123 Sample Street Any City, Massachusetts 12345

School District Contact Person/Phone #: Bob Dash/123-123-1234

IEP Excusal Form

Student Name: Jade Alexa   **ID:** 4274161
Home School: Hopkins Elementary School
Date of Parent Contact and Agreement:

Non-Attending Team Members

The following IEP Team member(s)

Name	Position	Attendance
		☑ Attendance not Necessary ☐ Excusal

will not participate in the IEP meeting scheduled for 06/04/2018 due to: (check appropriate box)

1. ○ **Attendance not necessary**
   a. The above member of the IEP team **is not required** to attend an IEP meeting in whole or in part if;
      i. the parent of a child with a disability and the District agree that the curriculum or related services area **is not** being modified or discussed

OR

2. ○ **Excusal**
   a. A member of the IEP team **may be excused** from attending an IEP meeting in whole or in part if;
      i. area of curriculum or related services area **is** being modified or discussed
      ii. the parent/guardian and the agency consent in writing; and
      iii. the member submits, in writing to the parents and the team, his or her input to the development of the IEP prior to the m

Required - Sign Here

Sign
↓

Parent Approval and Signature: _____

District Representative Approval and Signature: _____

![PowerSchool]

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- This form requires the parent to select one of two check boxes, then sign.

CHOOSE

will not participate in the IEP meeting scheduled for 06/04/2018 due to: (check appropriate box)

1. ☐ **Attendance not necessary**
   a. The above member of the IEP team **is not required** to attend an IEP meeting in whole or in part if;
      i. the parent of a child with a disability and the District agree that the curriculum or related services area **is not** being modified or discussed

OR

2. ☐ **Excusal**
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      ii. the parent/guardian and the agency consent in writing; and
      iii. the member submits, in writing to the parents and the team, his or her input to the development of the IEP prior to the meeting

Sign ↓

Parent Approval and Signature: _____

District Representative Approval and Signature: _____

- Check the boxes, sign the form. The following screen will appear:
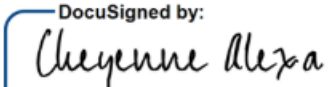
- The form is sent back to PSSE and can be viewed on the student's document area. Click the PDF link to open the full complete form. The PDF is only viewable in PSSE once ALL signers have completed the process.
- A copy of the signed PDF is also sent to the signee's email.

⌄ **IEP**				
📄 IEP Excusal Form Attachment: IEP Excusal Form.pdf [Signed]	Final	06/22/2018 Fri, 02:16 PM	06/22/2018 Fri, 02:16 PM	06/22/2018 Fri, 02:16 PM
📄 Individualized Education Program	Draft	06/12/2018 Tue, 11:43 AM	06/15/2018 Fri, 08:39 AM	---

School District Name: Salem

School District Address: 123 Sample Street Any City, Massachusetts 12345

School District Contact Person/Phone #: Bob Dash/123-123-1234

IEP Excusal Form

Student Name: Jade Alexa   **ID:** 4274161

Home School: Hopkins Elementary School

Date of Parent Contact and Agreement:

Non-Attending Team Members

The following IEP Team member(s)

Name	Position	Attendance
		☑ Attendance not Necessary ☐ Excusal

will not participate in the IEP meeting scheduled for 06/04/2018 due to: (check appropriate box)

1.   x   **Attendance not necessary**

     a. The above member of the IEP team **is not required** to attend an IEP meeting in whole or in part if;

          i. the parent of a child with a disability and the District agree that the curriculum or related services area **is not** being modified or discussed

                                          OR

2.   **Excusal**

     a. A member of the IEP team **may be excused** from attending an IEP meeting in whole or in part if;

          i.   area of curriculum or related services area **is** being modified or discussed

          ii. the parent/guardian and the agency consent in writing; and

          iii. the member submits, in writing to the parents and the team, his or her input to the development of the IEP prior to the meeting

Parent Approval and Signature: *Cheyenne Alexa*

District Representative Approval and Signature: _____

- View the DocuSign status of the form by clicking on More, view DocuSign details.

3:23:04 PM 6/22/2018

View DocuSign Status Details ✕

Document: IEP Excusal Form.pdf

Submitted By: CONSULTANT (PowerSchool - Dawn OHalloran) on 06/22/2018 Fri, 02:16 PM

Status: Completed 06/22/2018 Fri, 12:20 PM

Signer Role	Signer Name	Email Address	Status
Parent 1	Cheyenne Alexa	lba817@gmail.com	Completed, Signed: 06/22/2018 Fri, 12:20 PM

Close

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![PowerSchool logo]

DocuSign – Other Actions

A user can open the email and select items such as Finish Later, Decline to Sign.