Uncommon Schools

EXCELLENCE NORTH★STAR COLLEGIATE TRUE NORTH PREPARATORY

Operations Manual
PowerSchool and PowerGrade

Tools follow each subsection of the Operations Manual. Tools will fall into five categories and are labeled as follows:

	Key Dates:	Key dates and deadlines within the process
✓	Checklist:	Checklists to help keep track of what's done and what you still need to do
	Forms:	Sample forms/templates for you to use as examples
	Filing / Reporting:	Important filing or reporting requirements for the process.
	Key Contacts:	A quick reference for key contacts associated with the service.
	Further Resources:	Detailed information on a particular information or resources that list further information.

References to tools within each workbook are labeled with icons so you can easily identify each tool's category.

PowerSchool

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I. Overview of Roll-Out

A. Introduction

PowerSchool is a web-based student information system that allows all stakeholders—administrators, teachers, school staff, students, parents, and other service providers—in a school community to access real-time information in order to make more informed decisions and save time operationally. Five USI schools (initially) received the license to use PowerSchool under an agreement with the Center for Research on Education Outcomes (CREDO), in accordance with the conditions of a large grant from the Walton Family Foundation. PowerSchool has a multitude of functionalities, not all of which are easily implemented or configured. In rolling out PowerSchool, USI realized a need to prioritize which functionalities would be used from the beginning, phased in, and likely never be accessed. USI visited each school, interviewed staff, and inventoried the current operational processes and systems. Based on the information collected, USI divided PowerSchool functionalities into four categories ("Must Haves," the "Nice to Haves," the "Maybe Laters," and the "Nevers") and agreed to roll them out in corresponding phases described below.

B. Phase I — The "Must Haves"

The following processes were identified for immediate implementation:

- Attendance
- Class Rosters
- Discipline Tracking
- Enrollment
- Grading (PowerGrade)
- Lists and reports
- Mailing labels
- Report Cards
- Scheduling
- Special Education compliance tracking
- Staff data tracking
- Student achievement warehousing
- Student data tracking

C. Phase II — The "Nice to Haves"

The following processes were identified for gradual implementation over this school year:

- Health Tracking (daily treatment logging as well as health alerts)
- Fee Tracking (schools may choose to use this function if/ when they choose)
- Special Education IEP linking
- Warehousing historical grades

D. Phase III — The "Maybe Laters"

The following processes were identified for possible implementation next school year:

- Counseling logs
- Parent and Student View functions
- PowerLunch
- PowerScheduler
- Staff attendance tracking
- Transportation tracking
- Warehousing historical attendance

E. Items Excluded	The "Nevers"
	The following process was identified as not being within PowerSchool's capabilities, or as not being aligned with the needs of USI schools: ▪ Interim Assessment Analysis – PowerSchool does not have the sophistication we need.

II. Processes in PowerSchool

A. Attendance

Overview

A school's main source of revenue, state and federal per-pupil funding, is dependent upon its average daily attendance, or ADA. School budgets benefit by several thousand dollars for each student's school year's worth of attendance; essentially, an absence costs money. Not only does a high ADA bring increased funds, but strong attendance is at the core of achieving the mission of your Uncommon School. It is crucial to follow strict attendance accounting and reporting procedures for legal reasons, as well as ensuring that we are able to accurately report attendance to families. Furthermore, we all know that a student cannot learn if he/she is not in school.

Policies

Consult your school's Form B and Student Handbooks for your specific attendance policy. It is your responsibility to oversee the daily attendance process and ensure that it is working smoothly and efficiently.

1. PowerSchool can generate daily attendance reports to detail which students are absent, and for what reason. These are helpful to teachers for knowing who to expect to be missing from their classes, and administrators for tracking trends.

2. The following categories and sub-categories of attendance codes are available in the system for tracking student attendance at your school. The three major categories are the only three that teachers are able to enter, the sub-categories will be marked by the office staff after making phone calls and checking with the Principal.

- Present (default)
  - In School Suspension (ISS)
  - Early dismissal present, miss <u>less</u> than two class periods (EDP)
- Tardy (T)
  - Acceptable tardy (TA)
  - Unacceptable tardy (TU)
- Absent (A)
  - Excused absence (not due to illness, e.g. death in family) (AE)
  - Absent illness (AI)
  - Unexcused absence (AU)
  - Out of School Suspension (OSS)
  - Early dismissal absent, miss <u>more</u> than two class periods (EDA)
- Note that the two early dismissal sub-categories are somewhat unique. They are meant to track trends in students getting picked up early and therefore losing learning time. Discuss with your school administration how they want you to use it.

3. All Uncommon Schools take attendance only once per day. In PowerSchool, this is called a "Daily Attendance" mode (as opposed to a "Meeting Attendance" mode where attendance is taken during each class period). Attendance should be taken once at the beginning of the day by teachers, and changes will then be maintained by the office staff.

Daily Process

Steps	**Timing**
1. <u>Teachers take attendance via PowerSchool Teacher</u>	Within ten minutes of the start of the academic day After Morning Circle/ Meeting

- This should be done in homeroom/advisory/1st Period, depending on your school's schedule.
- Teachers should enter attendance <u>within ten minutes</u> of this period starting.
- Teachers only have three choices for attendance codes:
  - Present (this is the default if they mark nothing)
  - Absent
  - Tardy
    - If a student arrives tardy to school, he/she should stop by the office to get a tardy slip. If he/she arrives to the classroom before the teacher has marked the attendance, he/she should still be marked "tardy" by the teacher.
    - If a student arrives tardy to a class without a tardy slip from the office before the attendance has been marked, the teacher should mark him/her tardy AND send him/her to the office for a slip so that the reason for tardiness can be documented.
    - If a student arrives tardy to class after the teacher has already marked him/her absent, he/she should be sent to the office so that the reason can be documented AND the attendance code can be changed from absent to tardy by the office staff.
- NOTE: If teachers are unable to take attendance via their computer for whatever reason, they should write out a list of who is absent and who was tardy and send it to the office within fifteen minutes of the period's start.
- PowerSchool requires teachers to submit attendance (even if all students are present) to ensure that attendance is recorded accurately.
- If a substitute or another staff member is covering a teacher's class, he/she should be provided with a paper roster to take attendance.

Tool: *PowerGrade PowerSchool Teacher* "Chapter 2" (pp 28-30)

Tool: *PowerGrade and PowerSchool Teacher Cheat Sheets* to be created by USI and distributed during Teacher Training.

2. <u>Office Staff "receives" attendance in PowerSchool</u>	11-20 minutes after the start of Homeroom/ First Period

- Check for teachers who have not yet taken attendance:
  - From the Start Page, click "Reports" on the left side.
  - Click "Run Reports"
  - Click "PowerGrade Attendance"
  - For "Procession Options," select to have it run "In background

    now" (default) so that you can work on other tasks while it's running. It runs very quickly.
  - Click the report-running icon next to the logout button to access your report queue.
    - Verify that the report has finished running.
    - Click on the name of the report to open it.
- Follow-up with teachers who have not taken attendance by calling, emailing, or visiting their classrooms.
  - This will be frustrating and time-consuming initially, but will improve greatly after a teacher needs to be reminded several times.
  - If this process is not working well at your school after one month (give it time!), revisit your procedures with school leadership to determine what, if anything, needs to change.

3. <u>Generate Daily Attendance Report</u>

Within 30 minutes of start of Homeroom/ First Period

- From the Start Page, click "Absentee Report."
- Select the options you want to configure your report.
  - Note that the default Attendance Mode should be set to "Daily" for all our schools—verify this.
  - Selection "Include Verification Line" for recording of notes when making calls to families.
- Click Submit.
- Choose File > Print to print the report.

4. <u>Follow-up with Families and Teachers as needed</u>

30-45 minutes after start of Homeroom/ First Period

- If you have already received a phone call or note from a student's parent or guardian, note that on the Attendance Report printout.
- Call families of remaining students on your list to verify their absence. Record reasons on Attendance Report Printout.
- **Store each day's attendance reports in a binder, separated by day/week/month/year to maintain accurate attendance audit support.**

5. <u>Update student attendance codes in PowerSchool</u>

Within 50 Minutes of Start of Homeroom/ First Period

- From the Absentee Report, select "Functions" at the bottom of the report. This will automatically select the students that were included in the report.
- Click Counselor's Screen.
- Choose Attendance from the "Which Screen would you like to use to view the list of students" pop-up menu.
- Click Submit.
- Click each student's last name and use the Attendance page to update each student's attendance record.
  - Remember that teachers are only able to enter "Present," "Absent," or "Tardy."
  - The office staff must change the attendance to reflect a student's specific attendance status using the codes.

	Deadlines	Timing
	6. <u>Generate a revised Daily Attendance Report as in Step 3</u> ▪ Distribute to staff as decided by your school (email or paper copies in mailboxes. Store this report in the attendance binder.	Within 60 minutes of start of Homeroom/ First Period

	7. <u>Generate any other Attendance Management Reports</u>
	
	▪ Your principal, Dean of Students, and/or Managing Director likely want a running report of student absences to look for trends.
	  o From the Start Page, select "Reports" on the left side.
	  o Click "Run Reports."
	  o Select the particular report needed.
	  o Select "all students."
	  o Follow the steps and distribute as needed.
	▪ More detailed information on these reports can be found starting on page 32 of the *PowerSchool Initial Training Workbook*.
	
	Tool: *PowerSchool Initial Training Workbook* "Session 3: Attendance Process and PowerSchool Report"
	
	Tool: "Attendance Policies and Procedures" Template-- for your use in training school-based staff (on intranet)
		As Needed

B. CREDO Reporting

Overview

In accordance with your school's agreement with the Walton Family Foundation and CREDO, they are entitled access to your school's data on student demographics and achievement, staff demographics and qualifications, including students' results on norm-referenced exams (TerraNova and State tests). Over the course of a school year, there are specific tasks with deadlines that must be completed to ensure that we are in compliance with CREDO's requirements. Additionally, there are general PowerSchool maintenance tasks that must be completed in order to accomplish these CREDO-specific tasks. CREDO provides a guidance tool called Jumpstart which walks you through all the required steps.

Tool: Appendix *CREDO Walton Project Deadlines*

Tasks	**Deadlines**	**Timing**
	1. <u>Enter or upload student and staff data into PowerSchool</u> ▪ Use the registration forms detailed in the *Enrollment* section below. ▪ Keep in mind that although the forms seem tedious, they collect nearly all of the CREDO-required demographic data in one neat place. Save yourself the headache—send them out early and make sure they're complete! ▪ Enter the data from the forms into the Student and Staff worksheets of the *Big 6* templates. ▪ Upload the templates to PowerSchool using the import function (see Section II-F for more information on how to import).	Up to a month before the new school year begins, and ongoing if new students or staff arrive.

Tool: CREDO Jumpstart website, http://www.credojumpstart.org.
(Usernames and passwords by school provided on school-specific password sheets)

2. Run CREDO Check-ups and Adjust Data as needed — *Twice per year: November and April*

- PowerSchool has a special function which allows you to run a specific scan of the system to identify holes in your CREDO data.
  - CREDO requires the data on December 1, so make sure you start the data review process in early November.
  - Consult the CREDO Data Guidelines to ensure that your codes conform to those required.

Tool: Appendix *Data Check-up Tutorial*
Tool: Appendix *CREDO Data Guidelines*

3. Extract data from PowerSchool and send it to CREDO — *December 1st and May 1st*

Tool: Appendix *Data Extract Tutorial*

4. Send Norm-referenced Test Results to CREDO — *July 30th deadline*

- Test score data disks should be ordered as soon as they become available for both TerraNova and State tests.
  - A copy will be sent to CREDO for their study purposes.
  - Follow the guidelines in Section II-N for uploading these test results on to PowerSchool.

C. Custom Screens

Overview

Just as is described in the Special Education Compliance Section, PowerSchool can be configured to include specific fields on a screen together. Keep the following in mind:

- A “field” is a single data point (e.g. date of birth).
- A “screen” is multiple data points gathered to your specifications.

Process

Several useful and logical screens are already available for viewing student and staff information. If / when you’d like to create a custom screen, it is a relatively simple process, but you should check in with USI Home Office first to make sure there isn’t already something that exists to meet your needs:

Steps

1. From the Start Page, select System.
2. Select Custom fields/screens.
3. If the fields you want to gather on the screen are not already in PowerSchool, you will need to create them.
   - Click New
   - Assign using a logical name
4. Specify which fields you want included on your custom screen using their field names.

5. Click Submit

- Some example custom screens you may want to create for students and staff are:
  - Documentation on File (e.g. medical release forms, emergency contact forms)
  - Staff Certification (note that much of this data is already stored for CREDO)

Tool: PowerSchool Customer Support Site (support.powerschool.com)
(user names and passwords for accessing the customer support site are provided in school-specific format)

D. Discipline Tracking (for Violent Incident Report)

Overview

The Log Entry function in PowerSchool enables a school to create a dated record of certain student behaviors or activities, and to track trends. Log Types are used to classify the nature of a Log Entry. Log Subtypes have been created to further characterize the entry via an easy drop-down menu. The Discipline Log Entry will be used by USI schools to document student suspensions and expulsions, including both the reason (e.g., multiple misbehaviors, fighting, stealing) and the consequence (e.g., in-school suspension, out of school suspension, expulsion). The most serious disciplinary incidents are required by law to be reported to the state in an annual Violent and Disruptive Incident Report, so the form must be filled out carefully and according to prescribed instructions, found in the Appendix.

Appendix: Instructions for Completing a New Discipline (State) Log Entry

The student Discipline Log Entries can be searched to view, print reports, or export all of the Log Entries that relate to a particular event or type of incident. Special Education teachers will need documentation of disciplinary actions taken for students with IEPs, and Managing Directors will need a summary of incidents for reporting purposes.

Discipline Log Entry Subtypes

If your school leadership would like more sub-type codes added, send the information to the USI Director of Operations.

Discipline (State) Subtypes	Discipline (Other) Subtypes	
Burglary	Alcohol	Misuse of technology
Drugs or Alcohol (i.e., use or possession)	Bully/ Threatening	Mock weapon/ danger
Homicide	Bus misbehavior	N follow/ ignore dir
Injury/Intimidation	Cheating/ Plagiarism	Not prepared in clas
Injury-Risk Behavior	Cutting class	Other (see comment)
Other Criminal	Destruction of prop	Profanity
Sexual Offense	Disrespect to Adult	Repeated violation
Theft	Disrespect to Student	Sexual Activity
Weapon Possession	Dress code	Stealing
Weapon Use	Forgery	Talk innaprop time
	Gambling	Tardiness
	Gum, food, drink	Tobacco Products
	Harassment	Unwanted touching
	No homework	Trespassing
	Lying	

Entering a New Log Entry

1. Select the student from the search screen on the Start Page.
2. Click on “Log Entries” in the left menu.
3. Click “New.”

Detailed instructions for completing the form are provided in a separate handout in the Appendix.

Appendix: Instructions for Completing a New Discipline (State) Log Entry

Searching Discipline Logs

1. From the start page, click Special Functions.
2. Click Search Log Entries.
3. Enter log type (Discipline).
4. Enter sub-type (if desired).
5. Enter any other information desired, e.g.:
   - If searching for students with IEPs, enter "IEP" in the "Contains the text" field
   - If searching for incidents in a certain month, specify
6. Click submit.
7. You can choose to list the log entries, print a report, or do a quick export. Choose based on your needs.

Tool: *PowerSchool Initial Training Workbook*, p 22

E. End of Year Processes

Overview

PowerSchool must be told to end a specific school year in order to be able to begin enrollment and scheduling for the following school year. This is a very detailed process that requires patience and focus. Consult the PowerSchool Support Site, as well as the *End of Year Processes* cheat sheet to guide your work.

Timeline

More information will be sent your way well in time for this process to occur at the end of this school year.

Tool: *End of Year Processes*

F. Enrollment

Overview

In order to be able to track a student's schedule, grades, and activities in PowerSchool, he or she must be enrolled, either individually or as part of an import from Excel. Similarly, in order to be able to list a teacher as the main instructor for a certain class, he or she must be listed in the system. Over the course of the school year, you may need to enroll a new student or a student who was left off a mass import. You may also need to add a new staff member mid-year depending on your school's hiring needs. Each summer, you will mass enroll your incoming new students and staff all at once. For this coming school year, the majority of your students will have been enrolled for you.

Registration Forms

In order to ensure that you collect all the data needed for the correct functioning of PowerSchool and CREDO reporting purposes, you should use the "New Student Registration Form" and "Staff Registration Form" Templates. These forms can be customized to your needs, but as was discussed in the section on CREDO reporting, it is much easier to collect all data at once.

Registration Steps | **Timing**

1. <u>Use the modified CREDO Registration Forms to meet school needs.</u>

One month prior to accepting applications or registering new students

- The Student Registration Form is a Word document. It has been modified by USI to incorporate CREDO requirements and information collected by the schools. It is located in the Forms and Student Management sections of the USI Operations manual. It can be personalized to your school.
  - You can:
    - Add in additional variables your school needs to collect for state reporting purposes.
    - Include your school's name and logo.
    - Include the CREDO entry codes. They make the form more busy, and therefore confusing, but may ease data entry later. (These can be obtained from USI)
  - The information found on pages 1-3 of the Registration Form is all required for CREDO reporting purposes.
  - The Parent/Guardian Information is optional.
  - You may want to include a note letting parents know that the information they share is confidential, and will be used to help your school evaluate its progress.
- The Staff Registration Form is also a Word document. It can be personalized to your school much the same as the Student Registration Form.

2. <u>Distribute the Registration Forms at Open Houses and other pre-enrollment events.</u>

Throughout application and enrollment process

- Preface the distribution of the forms with an explanation that the information is confidential and all fields are mandatory.
- Set up a form collection system so that someone is checking the forms for completeness as they are turned in. Try to prevent the need to call families requesting missing information.

3. <u>Fill in the "For Office Use Only" Boxes.</u>

Day after completed by family

- Student Forms
  - **Entry Date** is meant to reflect the student's first day attending the school.
    - If the student is new mid-year, note first day of attendance.
    - If student is enrolling for coming school year, note the date of the first day of school.
  - **State ID#** reflects the number used for state reporting and tests.
    - For New York, this will be the student's OSIS number
    - For New Jersey, this will be the number on a student's test score report.
    - If this is the first time the student is entering public school in the United States, leave this field blank.
  - **District ID #** should be the same as the State Number.

- **School ID #** will vary by school:
  - Collegiate: OSIS number
  - ECS: an invented six-digit number based on the student's year of enrollment, and his or her location in alphabetical order (e.g. a student enrolling in 2006 who is first in alphabetical order will be 200601).
  - LPCS: same as ECS
  - NSA: Social Security Number
  - TNRP: same as ECS
  - *Note*: This numbering system was determined by need based on the CREDO Implementation Timeline for this summer. If your school would like to switch to using State ID numbers for School ID numbers in the future, you may.
- *Note*: if you are unable to get these ID numbers immediately upon registering a student, do so as soon as possible. They will make it possible to import students.

- Staff Forms
  - Create a unique Staff ID# using the following formula:
    - Staff members initials (first and last, only use middle if there are two staff members with the same first and last initials)
    - Staff member's year of initial employment
  - Staff IDs should be two letters and six digits (e.g. Ben Buis was hired in 2005, so his Staff ID # is "bb2005").

The Big 6 Templates

CREDO provides an Excel document which includes fields to capture all of the data collected on the student and staff registration forms, the *Big 6 Templates*. The six worksheets in this document were used in the implementation process, and can be used again each summer, to enroll new students and staff, as well as add new courses and rooms to the system. For the purposes of enrollment, you will be using the "Student" and "Staff" templates from the *Big 6*. The other four templates, "Courses," "Section," "Section Enrollment," and "Rooms," will be discussed in the Scheduling section of this manual.

Steps for Individually Enrolling a New Student

1. Choose Special Functions from the Main Menu.
2. Click Enroll New Student.
3. Fill in the information on the screen.
4. Click Submit.
5. The system then enrolls the student and displays the student pages on which you can enter the new student's information (including CREDO required fields). **Be sure to include the State ID # and all other fields as soon as you enter the information so that there is complete data for reporting.**

Steps for Individually Enrolling a New Staff Member

1. Choose Staff from the Main Menu
2. Below the Staff Search Function, select New Staff Entry.
3. Fill in the information on the screen.
4. Click Submit.

Steps for Group-Enrolling in PowerSchool	**Timing**

1. <u>Enter the data from the Registration Forms in the *Big 6*</u>
 	
▪ This data entry requires a familiarity and comfort with Excel.
  o Prior to beginning data entry, you and your data entry team should visit the *CREDO Jumpstart* website for a walk-though of the process.
    ▪ Click the tab labeled "Big 6 Templates"
    ▪ Select and watch the "Student Template" tutorial
    ▪ Select and watch the "Staff Template" tutorial
▪ Consult the *CREDO Data Guidelines* for coding information and other guidance as you work.
▪ Work as a team to check each other's data accuracy.
▪ Save the file with a logical, date-stamped name, including the date (e.g. "WCCS_Big 6_071806"). If the data entry occurs over multiple days, save the file with the current date each time. This will allow you to go back and use a back-up copy if/when you make mistakes.
▪ When you are finished with the templates, save each worksheet individually:
  o Student template example file name:
    "TNRP_Big 6_Student_FINAL_072806"
  o Staff template example file name:
    "TNRP_Big 6_Staff_FINAL_072806"
▪ *Note:* PowerSchool will not allow you to import student information without at least one Student ID#. Do not move on to Step 2 until you have entered accurate information in at least one of the Student ID columns!
	Ongoing as forms are collected

2. <u>Import New Student and Staff Information into PowerSchool</u> ▪ Follow the instructions provided in section III of the manual entitled "Importing Big 6 Files"	One month prior to beginning of new school year
3. <u>Verify the accuracy of your imports</u> ▪ Spot-check certain students and staff pages against the information on their registration forms.	

To update a subset of student records

When you imported the Big 6 Student file, you imported all information about all students, but it is possible to import selected values for only a subset of students as follows:

1. Setup a spreadsheet with columns for the data that you wish to update.
2. Ensure that Student Number is one of the columns (the student's First Name and Last Name are not necessary).
3. Set "Update only if not adding new records" to checked. <u>**This box must be checked**</u> for the import to result in an update to existing students; if it is not checked, then the system will consider the import as new students and create duplicate records.

Tool: *New Student Registration Form* Template and *Staff Registration Form* Template (in Forms section of Manual)

Tool: Appendix "Big 6 Generic Template"

Tool: Appendix *CREDO Data Guidelines*

G. Grading (PowerGrade)

Overview

Among PowerSchool's many functionalities, the two components that are most relevant to teachers are PowerSchool Teacher and PowerGrade. USI will train teachers on the basic use of both of these components; you will be responsible for ongoing support and trouble-shooting.

PowerSchool Teacher

PowerSchool Teacher is a web-based component like PowerSchool, but without the admin access.

In PowerSchool Teacher, one can:

- View student progress in classes (not only those taught by the viewing teacher)
- View student information (for students in one's class)
- Work on one's grade book remotely if he/she does not have the school-issued laptop at home/ on travel (synchronizes with PowerGrade when it is again opened on teacher laptop)
- Take and view attendance (including future absences)
- Submit lunch counts (n/a to USI schools)
- Print school reports available to you
- View the staff directory
- View the Daily Bulletin (if applicable)

PowerGrade

PowerGrade is a Windows-based software installed directly on the teacher's laptop. It synchronizes with PowerSchool whenever the teacher's computer is connected to the school's server.

In PowerGrade, one can:

- Enter assignments and grades
- Take and view attendance (including future absences)
- Submit lunch counts (n/a to USI schools)
- Enter a parent note
- View student information such as phone numbers, guardian names, and IEP alerts
- Create seating charts
- Generate reports such as missing assignments, progress in a class, or class rosters

Trouble-shooting

Teachers may have challenges in logging in, creating assignments, or accessing certain pieces of information. Your best resources will be the *PowerGrade PowerSchool Teacher Initial Training Workbook*, as well as the PowerSchool Customer Support site. Here are some common problems:

Potential Problem	Solution
Forgotten password to PowerSchool Teacher.	You should log in to PowerSchool, select Staff from the left pane, find the teacher, and click Security Settings. In the field for Teacher Password, enter a generic password (e.g. USI). Instruct him/her to login immediately and change the password.

Forgotten password to PowerGrade	You should log in to PowerSchool, click System, click PowerGrade Settings, click PowerGrade/PowerSchool Connectivity key, then give the teacher the Temporary PowerGrade Locking Password, and instruct him/her to use it and then change the password immediately to something he/she will remember (the # changes daily).
Teacher goes to enter grades and can't see the correct class(es) in PowerGrade.	Login to PowerSchool and verify that the correct group of students is "scheduled" to be in that teacher's class. Go to Start Page>Setup – School> Sections. This will give you all courses. From the courses, you can click "Size" and you will see a list of all students enrolled in the course. From each student record you can select "Modify Schedule" to change the courses the students are enrolled in.
Grades are averaging out incorrectly.	Check with the teacher that they've created assignment categories to define the weighting system they're planning to use. Important things to check for: weighting and whether they have selected "Drop" to drop the lowest score.
General PowerGrade questions	The ? icon at top right of PowerGrade has a complete Help Menu that is context-sensitive to the page you are currently on.
Grades from PowerGrade aren't synching with PowerSchool	Check to make sure the teacher is "working online" from the menu across the top of his/her PowerGrade screen. If they are and the grades are still not syncing, call PowerSchool support.
Teacher sees a "blank screen" after opening PowerGrade and panics	Check at the top of the screen—the file menu, et.c,. should be there. The teacher needs to select a class from the Classes menu.
Teacher can't see the current grading period in PowerGrade	Check to make sure he/she has it set to show that grading period on the spreadsheet (PowerGrade>Windows>Final Grade Setup>Select desired term from FG Name drop-down menu>Click Show on Spreadsheet

Tool: Appendix *Teacher's Quick Reference Card – Primary* and *Teacher's Quick Reference Card - Secondary*

Tool: *PowerGrade & PowerSchool Teacher: Initial Training Workbook*

H. Lists and Rosters

Overview One of the simplest, yet most useful, components of PowerSchool is its search function. From the Start Page of PowerSchool you can search for groups of students based on certain characteristics, such as grade level, participation in an activity, enrollment in a special program, or date of birth. This capability for precise searching allows you to generate lists for teachers, administrators, and other school personnel, as well as to generate a specific report for a certain student group. The potential uses for this search function are only limited by your time, your patience, and your willingness to look up specific field names to aid you in your search.

Searching basics

1. On the PowerSchool Start Page, enter search commands in the Search Students field.

- First type in the field name (e.g. "zip" for zip code, "grade_level" for grade level, etc.)
  - To ensure you have the field names accessible, right-click the Field Names option and select "Open in New Window."
- Then type the desired comparator (e.g. "=" for equals, "<" for is less than)
- Last type the search argument (e.g. 10681 for a zip code search, 7 for a grade level search)

2. Click Search.

3. Use the drop down menu at the bottom of the Student Selection screen to select a function that you want to complete with the group of students.

Commonly used functions

Specific functions from this drop-down menu that you will likely use often include:

- Printing mailing labels – for mailings home, to put on test packets, etc.
- Mass enrolling a group/team into a certain course
- Quick export – allows you to export the selected students to Excel
- Search further by grades, attendance, and other fields
- Generate form letters
- List students – allows you to customize a list by naming fields you want included. Possibilities for this include:
  - Field trip lists—include emergency contacts, medical information, ID numbers, etc.
  - Testing lists—include dates of birth, State ID numbers, and other needed info
  - Class lists for attendance for substitutes

Ultimately, you may find that you want to generate a specific sort of student list with some frequency that is not already configured in PowerSchool. Rather than always using the List Students function and having to re-enter the desired fields, you can run a specific report you've created for this purpose.

Additionally, the lists you create show on the screen and would have to be printed from the screen. While you can select some formatting options, you should do an export to Excel of the data if you would prefer to format the data or add logos, etc. (unless you create a report to house this information).

Creating basic reports

Several report options are already available to you, such as attendance reports, honor roll standings, etc. Report Cards are covered in their own section. Work with your school leadership to determine what other reports might be helpful.

Steps

1. From the Start Page, click Reports.
2. Select Report Setup.
3. Select the type of report you want to create. You'll likely want to create one of the following:

- Form Letters
- Mailing labels
- Object reports—with some time and practice you can create and store consistent lists for your use but these are not initially intuitive to create.

4. Consult the *PowerSchool Initial Training Workbook* and the PowerSchool Customer Support Site for more information on this process.

Sharing best practices

As you create new reports, please share them with your colleagues! USI will work to create a system for sharing files via the intranet. In the initial implementation of PowerSchool, send all feedback and templates to share to USI Operations.

Tool: *PowerSchool Initial Product Training Workbook*, pp 8-10

I. Logs (Conference and Counseling)

Overview

Much like what will be done for discipline, the log function of PowerSchool can be used to date stamp specific activities connected with a specific student. USI's PowerSchool is configured to allow for the logging of student-family-teacher-staff conferences, as well as counseling visits. It will be at the discretion of your school's administration if and how these functions are used in the short-term. In the long-term, USI would ideally like to see a consistent use of these functions across schools as a "best practice" in centralizing key information.

Process

Follow the same steps described in creating a log entry detailed in the Discipline section, except choose "Conference" or "Counseling" from the log-type drop down menu.

J. Progress Reports

Overview

Each USI school has a slightly different variation on Progress Reports. In general, Progress Reports are sent home mid-grading period to alert parents to problem areas and keep them informed of successes.

Process

PowerGrade and PowerSchool have the capability to generate basic Progress Reports. USI will determine what this process will be at each school through August and into September.

Currently, several of the schools have elected to have these reports custom created by a PowerSchool report writer. More information on how to access these reports will be provided upon completion of the reports.

K. Report Cards

Overview

PowerSchool has the capability to generate report cards. This is done via its Object Report generating capability, such that certain aspects of the report are pre-made, and real-time data such as grades are pulled from the system and entered on the report.

Object Reports have a lot of potential, but the generation of these Object Reports requires time and some level of expertise in using technical computer language. USI is in the process of soliciting help in making these customizations for each of our schools' report card needs.

Pre-Report Card Process

The most challenging aspect of the report card process is often making sure that all staff involved in the process understands what is due, and by when. It will be the DOOs responsibility to coordinate the report card process, from reminding teachers in advance of the coming deadlines to working with the office staff to make sure that attendance is up to date and accurate. As each report card date approaches, the USI Operations team will work with you to devise a specific plan to design a smooth report card process.

Key dates and deadlines are included on the Director of Operations Master Task List. A sample Report Card Process reminder sheet for teachers will be available for your modification.

Tool: *PowerSchool Cheat Sheet: Report Cards* Template (forthcoming)

End-of-term Processes

There are certain processes which must be performed at the conclusion of each grading period to permanently store grades. Consult the PowerSchool Initial Training Workbook for the steps in this process.

The end of term processes must be completed concurrently with the printing of report cards.

Tool: *PowerSchool Initial Training Workbook*, pp 46-55

L. Scheduling

Overview

PowerSchool maintains current student and staff schedules in order to facilitate grading in PowerGrade, run class rosters, and document who is supposed to be where and at what time. A component of PowerSchool known as PowerScheduler is configured to take a school's scheduling parameters and automatically schedule students and staff accordingly. Given that USI schools are smaller than average, and that our student schedules are constructed to take into consideration factors such as special needs, behavior issues, and personality balances, we do not anticipate using PowerScheduler. This may change in the future if a school deems it a worthy pursuit.

In lieu of PowerScheduler, USI school principals, Deans of Students, and Lead Teachers generally create student schedules and class lists manually as Word and Excel documents. They should have these available to you within a month of the first day of school so that you can configure the system accordingly via mass imports and enrolls. You may occasionally need to alter a specific student's schedule, such as switching him/her from a regular-level course up to an AP course. These processes are documented below. Prior to going through these processes, however, it is necessary to review the system for naming and numbering courses, as well as the tools for mass importing course lists.

School Numbers

Given that it is a database-minded system, PowerSchool works best in numbers. As you've probably noticed by now, most of the text fields you work with each have associated number codes. This ensures that the correct, unique information is pulled or accessed for actions such as creating report cards or Special Education reporting. For this reason, each school in the USI "District" has a unique number for the purpose of graduating students and rolling up data. Additionally, each course offered at your school has a unique identifier so that the correct associations can be made in linking a teacher to a course, and placing students in his/her class. USI has created a School and Course Code numbering system which is set up to be able to expand as our schools grow. A Master document will reside on the USI Intranet for documentation purposes, you will be charged with updating and maintaining your school-specific codes based on the system.

USI School Codes are based on Network, and are then ordered by a school's order of opening:

- Excellence Network
  - ECS: 101

- Collegiate Network
  - WCCS: 201
- North Star Network
  - NSA Downtown MS: 301
  - NSA HS: 302
  - NSA North: 303
- Preparatory Network
  - LPCS: 401
- True North Network
  - TNRP: 501

Course Numbers

Each course is identified by a unique 4 digit course number based on the following scheme:

- Grade: 2 digits (e.g. 5^{th} = 05, 11^{th} = 11)
- Course: 2 digits (grouped by "department," e.g. Math courses are in the 20s)

Your courses for the coming school year have been numbered and named. Be sure to use the USI scheme in numbering and naming in the future. The course number does not include the school number, because courses get associated to schools in PowerSchool. This allows us to manage a smaller list of course codes and then associate them to the appropriate schools.

Tool: Appendix *USI School and Course Codes*

The Big 6

The four remaining worksheets in the *Big 6 Templates* allow for easy and mass importing of new courses, as well as enrolling groups of students in the same courses. Consult the *CREDO Data Guidelines* when filling out these out. For the coming school year, much of your scheduling has been done for you, except for the enrollment of students in the correct courses. You may need to do this once class lists are decided for your school if it occurs after PowerSchool Implementation.

Tool: Your school's *Big 6 Templates* used during implementation

Process

Steps for Mass-Importing Courses into PowerSchool	Timing

1. <u>Enter Course Information in the *Big 6*</u>
▪ This data entry requires a familiarity and comfort with Excel.
  o Prior to beginning data entry, you and your data entry team should visit the *CREDO Jumpstart* website for a walk-though of the process.
    ▪ Click the tab labeled "Big 6 Templates"
    ▪ Select and watch the "Course Template," the "Section Template," the "Section Enrollment Template," and the "Rooms Template" tutorials.
▪ Consult the *CREDO Data Guidelines* for coding information and other guidance as you work.
▪ Work as a team to check each other's data accuracy.
▪ Save the file with a logical, date-stamped name, including the date (e.g. "WCCS_Big 6_071806"). If the data entry occurs over multiple days, save the file with the current date each time. This will allow you to go back and use a back-up copy if/when you make mistakes.
	As soon as your Administrator provides you with schedules and/or class lists

- When you are finished with the templates, save each worksheet individually:
  - Course template example file name: "NSA_Big 6_Course_FINAL_072806"
  - Section template example file name: "NSA_Big 6_Section_FINAL_072806"
  - And so on.
- *Note:* Given that each of these templates are imported individually, they can also be worked on and imported at different times. If you get your schedules two weeks before your class lists, go ahead and get your schedules configured in PowerSchool! However, be aware that each sheet may have a link to another worksheet so if you change data in one, be sure it is in the other – for example, Sections have the column Course Number on it, as does the Courses worksheet.

2. Import Data Into PowerSchool

No less than two weeks before Day 1 of school

Below are the general steps for importing each of the Big 6 files. It is mostly the same for each file, with specific departures described below.

1. Prepare the Excel file for import.
   a. Make sure there is only one header row.
   b. Delete all blank but formatted rows (or else, PowerSchool will try to import them).
   c. Any cell data with a string of values separated by commas cannot have spaces in it. Correct if need be.
   d. Save As… Choose "Text (Tab Delimited)" as the file type.
   e. Ignore error messages; click "Yes" to proceed.
2. Go to Start Page > Special Functions > Importing & Exporting > Quick Import.
3. Set "Table" to the following values for each Big 6 file:
   a. Students (Big 6 file) to Students (Table)
   b. Staff to Teachers
   c. Rooms to Rooms
   d. Courses to Courses
   e. Sections to Master Schedule
   f. Enrollment to Student Schedule
4. Click "Browse" to choose your Text Tab Delimited file you just saved in step 1 as the "File to import."
5. Leave "Suggest field map" as checked.
6. Click "Import."
7. PowerSchool will suggest fields to map each spreadsheet column to. Double check the mapping to ensure it is correct.
8. Set "Exclude first row" to checked.
9. PowerSchool will start printing out (on screen) the status of each row – imported successfully or an error message in red.
10. Copy or print the Import Log and proceed to troubleshoot any red error messages. Usually an error message refers to a problem in the way that the spreadsheet is set up.
11. Validate the data (as described below).

On a first import, import the Big 6 files in the following order (first to last): Staff, Rooms, Students, Courses, Sections, Enrollment. Validate the data after each import. It is especially important to validate Sections data carefully before doing Enrollment, since a large amount of time and work is required to undo mistakes.

4. <u>Review your system to verify schedules are configured correctly</u> ▪ Print out sample schedules for teachers and student. Go to Functions>Master Schedule or for each teacher, go to their Staff page and select "Schedule Matrix" o Ask your Principal to review them for accuracy. o Make changes as needed.	No less than one week before Day 1 of school

Maintaining Student Schedules/ Changing Courses One at a Time	Timing
1. <u>Drop Courses</u> ▪ From the Start page, select the student: o Click Modify Schedule o Follow the prompts for dropping one or all courses 2. <u>Add Courses</u> ▪ Consult pages 26-7 of the *PowerSchool Initial Product Training Workbook* for details and options. ▪ You can either search for a course to enroll a student in, or do a "Quick Enroll" if you already know the course number and section.	Ongoing throughout school year

Tool: *PowerSchool Initial Product Training Workbook*, p 26

M. Special Education Compliance Tracking

Overview

There is an extensive amount of reporting and documentation required in serving students with special needs. Given PowerSchool's capability to maintain real-time data linked to each student over the course of his/her years in our schools, USI will gradually work to get all Special Education documentation onto PowerSchool. The USI Director of Special Education is working with the Operations team to configure PowerSchool to support the documentation of the compliance process. In the future, USI will phase in the housing of soft copies of Individual Education Plans (IEPs) on the shared server that can be linked from PowerSchool.

Compliance Custom Screen *(forthcoming in 2006-2007)*

A custom screen in PowerSchool will allow Special Education coordinators, teachers, and other service providers to see at a glance the information they need to best meet the needs of a particular student with special needs. This "Special Education Compliance" screen will include:

- o Student Identification Information
- o Individual Education Program Data
- o Evaluation Data
- o Other Data

▪ This screen will be listed as one of the screens that can be accessed once a particular student has been selected from the PowerSchool Start Page.

- The USI Director of Special Education will work with school-based Special Education Coordinators and/or teachers to ensure that this custom screen is being used correctly and meet's the needs of the program.

- **DOO responsibility** will be to enroll new service providers as staff in PowerSchool when notified, and to set their security settings appropriately.

The fact that this information must be kept confidential and may only be accessed by specific school personnel is one of the reasons that a limited number of staff may have administrative access to PowerSchool. Please keep this in mind as you work in PowerSchool handling student information. More on security settings is included in Section V.

Special Education Services Log

For compliance reasons, all Special Education Service Providers must document their sessions with students, including the date and length of a session. A "Special Education Services Log" has been set up for this purpose. All Service Providers will be trained on the use of this log function.

Basic Information on the Special Education Services Log:

- New entries are created much like a discipline log.
- The log sub-types are named to allow each possible provider a virtual "file" to record their visits. Sub-types include:
  - Speech Therapist
  - Special Education Teacher
  - Nurse
  - USI Director of Special Education
  - Occupational Therapist
  - Physical Therapist
  - School Special Education Coordinator
  - Hearing Education Services
  - Counselor
  - Other Service Provider
- Service providers will use the log to record the date of their visit, the duration of the session, and basic notes (e.g. a student's temperament on that day, reminders to self for next session, specific incidents of note that are not confidential). Confidential case notes will not be recorded in this field.
- Log reports are generated much like a discipline log.

DOO responsibility with the Special Education Services Log will be to trouble-shoot with Special Education Service Providers as needed if/when they need assistance in creating a log entry or generating a report.

N. Student Achievement Warehousing

Overview

Although PowerSchool is unable to perform the sophisticated data analysis that our schools need, it is able to store and organize assessment scores for documenting growth and reporting out. Starting with this school year, USI will work to get student scores on norm-referenced exams uploaded into PowerSchool. This will include scores on the SAT, PSAT, SSAT, TerraNova, and State exams. For this reason, and for CREDO-reporting purposes, you will be responsible for ordering the test score data disks.

Process

This process will require you to save the test scores a specific way in Excel, save them as an ASCII text file, and then import them into PowerSchool. The USI Operations team will work with you to understand and implement this process throughout the school year.

Importing Test Scores

- Before importing test scores, you must have an ASCII text file that contains the test score data being imported, preferably delimited by tabs.
- To record the numeric, percentage, and alphanumeric scores for test scores, use the following numeric suffixes after the column headings preceded by an underscore:

  - [Column name]_1: Displays the numeric score. For example, include in the Math_1 column scores like 17, 27, and 22.
  - [Column name]_2: Displays the percentage score. For example, include in the Math_2 column scores like 57%, 90%, and 73%.
  - [Column name]_3: Displays that alphanumeric score. For example, include in the Math_3 column scores like F, A-, and C.

Note: Do not place spaces in the column headings. An underscore can be used to indicate a space. (i.e. social_studies_1) If you use the Alpha score type, do not leave it empty. If a student does not have a score, enter a hyphen or zero. Also, you do not have to import all three score types (number, percent, and alpha). You can import just one or two if you prefer.

To import student test scores from an ASCII text file into PowerSchool:

1. On the start page, choose Special Functions from the main menu.
2. On the Special Functions page, click Importing & Exporting.
3. On the Importing & Exporting page, click Quick Import. The Quick Import page appears.
4. Select "Test Scores" from the Tables drop box. Complete the page as needed.
5. Click Import. The Select Test page appears.
6. Choose a test from the Test pop-up menu. If the test you want does not appear, create the test. For more information, see documentation for "Set Up Tests and Scores."
7. Click Submit. The "Import Records from an ASCII Text File" page appears.
8. From the PowerSchool pop-up menu, choose the PowerSchool fields into which you want the system to save each value in the "From your file" column.
9. For unmapped fields, enter the imported value you want to use in the field and select the PowerSchool field from the pop-up menu.
10. Click Submit.

The records the system successfully imported and those that the system could not import because of your specifications appear on the Import Progress page. The system imports the data into the Test Scores table. You can view each student's test scores on the Student Test Scores page.

Existing test scores can not be updated with an import. They would need to be modified individually or a new test import would be needed.

III. School-Level Initialization (Note: This will not be a regular task for Directors of Operations, but does provide background on how the schools were implemented)

Overview

- Before a school can start using PowerSchool, the first step is to input foundational information about the school into the system. Form A and Form B are the worksheets used to map out and capture this information on paper.
- "Form A" is a PowerSchool worksheet that captures key district-level settings; it has already been completed by USI and the settings apply to all USI schools.
- Each individual school has its own "Form B," which contains the critical school-level information which must be inputted into the PowerSchool system to initialize a school's settings. Inputting the Form B information is sometimes referred to as "initialization" or "implementation" or "initial school setup."
- In addition to inputting Form B, to complete the initial school setup, you will import the Big 6 data files (Students, Staff, Rooms, Courses, Sections, Enrollment) into the system and validate the data.

A. Form A

Overview

Form A is a worksheet that lays out the way the USI Network is designed to operate. Some of the processes detailed in Form A are already occurring in each of our schools in very similar ways, others are a compromise between schools' existing systems, and still others are completely new—created to fill in holes. The information documented on Form A was then used to configure PowerSchool to match the way the "USI District" operates.

Tool: Appendix *PowerSchool Business Review – District Office Settings: Implementation Form A*

Nuances

Major settings of note included on Form A

1. Types of calendar membership days

- Reflects the calendar membership codes used by school leadership when setting the school year's calendar
  - Used as a way to track and group the days on your school calendar.
  - There are five codes:
    - In session (IS)
    - Weather/ Snow Day (WS)
    - Vacation (V)—break of more than one day
    - Holiday (H)—break of only one day
    - Professional Development (PD)
  - Note that there is not a code for ½ days, as these early dismissal days still count as a full day for your school's reporting purposes.

2. Entry and Exit Codes

- Make sure that your office staff is familiar with each of the codes for their use.
  - Entry:
    - Original Entry – this applies only to students first entering United States public schools (e.g. kindergartners, first graders, recent immigrants)
    - Transfer from Out of State
    - Transfer from Out of City, In State
    - Transfer from within City
    - Home School Student
  - Exit:

        - Transfer Out of State
        - Transfer Out of City, In State
        - Transfer Out, In City
        - Expulsion
        - Graduation
- Keep in mind that funders, state agencies, and perhaps other parents will be curious where students entered from or exited to. Accurate documentation is a must.
- Please note that these attrition codes are not the same codes elected by USI to monitor in the performance dashboard and report cards.
- Directors of Operations and office staff should use the Exit comment to capture the more detailed USI Codes:
    - Mission and Culture Fit: Culture, Parent-Initiated
    - Mission and Culture Fit: Discipline, Parent-Initiated
    - Mission and Culture Fit: Expulsion
    - Academic: Retention-Based
    - Academic: Parent-Initiated
    - Mobility: Moved
    - Mobility: Private School
    - Mobility: Exam School
    - School Programs: Scope of Offerings
    - School Programs: Transportation
    - School Programs: Special Ed Out Placement
    - Personal: Student Health/Illness
    - Personal: Family Health/Illness

3. <u>Ethnicity Codes</u>

- This is both a piece of CREDO-required and state-reporting data. Additionally, it is used by Managing Directors, Principals, and others.
- Although it may feel awkward to ask families to identify the ethnicity of their student(s) straight out, it is required information. If a family member refuses to answer, use your best judgment; perhaps ask his/her teachers if they've been informed.
- There is a state-reporting quirk in the way USI had to configure PowerSchool for the USI District. Please keep the following in mind as you enroll new students and staff:
    - New York has five ethnicity reporting codes:
        - Caucasian (C)
        - Asian or Pacific Islander (API)
        - Hispanic (H)
        - Black (B)
        - American Indian or Alaskan Native (AI)
    - New Jersey has seven ethnicity reporting codes:
        - Caucasian (C)
        - Asian (AS)
        - Pacific Islander (PI)
        - Hispanic (H)
        - Black (B)
        - American Indian or Alaskan Native (AI)
        - Other (Oth)

4. Log Types

- Log entries are used to create a dated record of certain student behaviors or activities.
  - Log types are used to group log entries by classification indicating the nature of a log entry.
  - Log sub-types have been created to characterize the entry via an easy drop-down menu.
- Currently, USI's PowerSchool is configured to include four major types of log entries:
  - Discipline (see section II-D)
  - Conference (see section II-I)
  - Special Education Service Provision (see section II-M)
  - Counseling (see section II-I)

5. Grade Scales

- There are at least three similar, but distinct, grade scales in the USI PowerSchool system. These were pulled from existing grade scales currently in use at our schools.
- The scales are clearly named; teachers must be told and reminded to use the scale identified with their network:
  - Secondary Grade Scales:
    - NSA and True North will use the same scale – NSA/ True North Grade Scale
    - Collegiate Grade Scale
    - Preparatory Secondary Grade Scale
  - Primary Grade Scales:
    - All USI elementary schools use a standards-based grading system, this scale is on a 1-4 level of mastery of material.

6. GPA Calculations

- PowerSchool is currently configured to offer both a Simple and a Weighted GPA. This is historically a trouble area for many PowerSchool users due to the intricacies of setting weighting formulas and incorporating elective courses. It is heavily discussed on the PowerSchool Users' Group (PSUG).
- USI will work to get as much configured correctly prior to the start of the school year, but there may be multiple iterations.

Process

- Form A was completed and settings were configured to the best of a collective of knowledge as of July 2006. It is entirely possible that there will be nuances USI was not aware of, and that changes to settings may need to be made mid-year.
- Although it is unlikely, a minor change of one setting by one school could lead to problems at another school. For this reason, only USI Home Office staff will have security access to make changes to these district-level settings.
- If/when you feel that a change needs to be made to a district-level setting, alert USI Operations via email.
  - Explain the problem you are experiencing, and what setting you believe needs to be changed to correct this problem.
  - Explain the expected impact making or not making the change, and include your time-frame.
  - USI will investigate, consult with PowerSchool Support if needed, and follow-up as soon as possible.
- Additionally, these settings will be officially revisited on an annual basis.

B. Form B

Overview

Your school's Form B reflects the processes specific to your school that are not necessarily district-wide, although there is much overlap between schools. Some of the processes laid out in your school's Form B were already in use, others are newly created based on an identified need. Each form was reviewed and approved by your school's managing director or principal. The information documented on Form B was used to configure PowerSchool to match the way your school operates.

Tool: Appendix *PowerSchool Business Review – School Settings for* _______________ (your school)

Nuances

Major Settings of Note Included on Form B

1. School Information (pp 1-8)

- Most of these settings will stay the same from year to year, but some may change.
- Bs sure to update as needed during your annual review of Form B.

2. Scheduling (p 9)

- Your school's start and end-dates by grading period, as well as holiday, vacations, and professional development days have already been programmed into PowerSchool for the coming school year.
- PowerSchool will expect you to enter attendance for days you are scheduled to be in school, and vice versa for days off from school.
  - If/ when any dates on your master calendar change, **you must make these changes in PowerSchool!**
  - **Failure to do so will lead to a skewed ADA.**

3. Periods and Days (p 10), and Bell Schedules (p 17)

- These settings reflect the unique daily schedules that your school follows. This is slightly different for primary schools than secondary schools.
- These daily schedules are currently configured based on information your school had available as of mid-July.
  - As schedules are updated in August, it will be your responsibility to make changes in PowerSchool as needed.
  - Note that there is not a day named "Early Dismissal" for any of the schools. Although your school may operate on an accelerated schedule on those days, it still counts as a full day of attendance for reporting purposes given that students are in school past noon.
- The settings for these days are linked to the placement of students in classes, and therefore the availability of those students to teachers as a class in PowerGrade.
  - You may make changes to this configuration as needed, but be mindful and test out your changes afterwards.
- If/when you make changes, document them on your school's Form B, and save it under a revised file name.

4. Attendance Setting (pp 11-16)

- Attendance policies and procedures are detailed in section II-A of this manual.
- This is one of the processes that USI would like to see consistent across all USI schools for the sake of comparison and operational ease.
  - Attendance is one of the key indicators on the Performance Dashboard and Year-End Report Card. For this reason, it is essential that all schools follow the same procedure.
- The above being said, it is possible that some of the settings do not accurately reflect what is required by your state or charter authorizer. If you are informed that this is the case, please inform USI Operations before making any changes. It will be optimal to make the same changes at all schools in coordination.

5. Activities

- This component of PowerSchool allows you to track student participation in activities, sports, or clubs that you specify.
  - This function lends well to searches for generating lists, sending form letters, or comparing grades of students in a given activity.
  - The first ten activities listed are CREDO-required fields and cannot be deleted.
  - Use this function for activities that do not require attendance tracking and where grades are not assigned.
    - Possible activities to track include: clubs, tutoring groups, Saturday school attendees, or students on academic probation.
    - If there is a special activity for which a student receives a grade, and/or attendance must be tracked, it is better to set up a "phantom class" (see the scheduling section).
- The Activity function is cleared out each summer for re-"enrollment" each summer. In other words, students identified as participating in dance one school year must be re-"enrolled" in dance if they continue the following school year.

6. Fees

- This is an optional component. It is entirely up to you as the Director of Operations to decide if you want to use this function to track the collection of fees at your school. As such, it has been set up very loosely in PowerSchool.

7. Grading

- Grade terms are currently set up based on your school's major grading terms.
  - When creating courses in PowerSchool you will need to specify if they are for a single grading period, two grading periods (a semester), or the full school year.
  - If there is a course added which will not fall into the parameters of one of your normal grading periods (e.g. you school is on quarters and the class will be a trimester long), you must make a change to the Final Grade Setup settings in the "School Setup" part of PowerSchool. Refer to the *Final Grade Setup Manual* (on the intranet).
- There is an option to pre-define comments for teachers to use in their PowerSchool grade books. USI did not pre-enter comments for any school based on either: a) desire of the school administration that teachers create unique comments for each student specific to his/her performance, or b) an excessively long list of desired comments that is too cumbersome for practical use in PowerSchool.

- Honor Roll settings were based on what your school's administration expressed as of mid-July. If these decisions change mid-year, be sure to change them in PowerSchool.

Tool: *Final Grade Setup Manual* (saved on intranet)

Process

- Each Form B was completed and settings were configured to the best of a collective of knowledge as of early July 2006. It is entirely possible that there will be nuances we were not aware of, and that changes to the settings may need to be made mid-year.
- USI Home Office staff and you, the Director of Operations for your school, will have security access to adjust these settings. If your Principal or Managing Director expresses concern and/or a desire to change a specific setting, they should funnel it through you. Only make the change if you are sure it makes sense. Consult with the USI Home Office, PowerSchool Support, and/or PSUG as needed.
- The Master Director of Operations Task List includes a reminder to do an annual review of your School's Form B (School Settings). Do this after running your end-of-year processes for the closing school year.

C. Initializing School Settings

Overview

Form B is designed to walk you through the PowerSchool initial setup. Once Form B has been completed and the Big 6 data files prepared, initialization consists of inputting the Form B information into the system and importing the Big 6 spreadsheets.

Login

To begin, first login:

1. Go to http://64.195.238.157/admin/ (for NY users) http://64.195.238.158/admin (for NJ users)
2. The USI Director of Operations or Chief Technology Office should have already given you a user name and password. Enter your user name and password into the field provided with a semi-colon separating the two and no spaces: username;password. Click "Enter."
3. In general, whenever you log in, the first thing you should do is make sure you are modifying and viewing records for the right school and term. Click on the blue words "School" and/or "Term" at the top center of the page and select the school whose settings you want to change and the term you want to change – almost always the relevant term will be the current schoolyear.

Schools/School Info

The first step is to input basic information about the school at the District Office level. A PowerSchool user with administrative permissions at the District Office level must be the one to input this information.

1. From the Start Page, click "School" and select "District Office." Click "Term" and select the upcoming schoolyear.
2. Under the Setup menu on the left, click "District."
3. Click "Schools/School Info."
4. Click the name of the school you are setting up.
5. Fill out the form according to the information in your Form B.
   a. Skip "StatePrld."
   b. On Form B, your school's Title 1 funding status is #15 under "School Information (CREDO Specific Fields)" but it appears higher on the online form.

NOTE:
If the steps below do not specify a value to set for a particular field that appears on the PowerSchool setup pages, then it is safe to assume that the value is defined by Form B or that the default value will suffice.

Set Permissions

Once a School has been created, a PowerSchool user with administrative permissions must assign school-level administrative permissions to users who need them.

1. From the Start Page, School = District Office, Term = [current year], click on “Staff” in the left menu.
2. Select a staff name.
3. Click “Security Settings.”
4. Check the box next to the school(s) for which the staff member needs permissions.
5. Select the relevant value from the “Group” drop-down menu.

Note: In order to enter log entries, users need to have view and modify access. This will enable them to be able to be able to modify any screen they have access to. Care is required if you need to give users this access.

To modify individual page permissions:

1. Go to Setup>System>Security>Access to Page Permissions
2. Select “On” from the page menu.
3. Click Submit.
4. On the Security page, click "Modify access privileges for this page" on each page for which you want to define permissions. The Access Privileges page appears.
5. Select the option to determine the level of permissions:

    - Group default: Level determined as the group default on the Edit Group page for each group.
    - None: No access to the page.
    - View-only: Can read but not modify the information on the page.
    - Full: Can read and modify information on the page.

6. Click Submit. The page reappears.
7. Click Home.
8. Click System Administrator.
9. Click Security. The Security page appears.
10. Click "Access to Page Permissions." The "Access to Page Permissions" page appears.
11. Choose Off from the "Turn modify permissions" pop-up menu.
12. Click Submit. The Security page appears.

Years and Terms (Required)

1. From the Start Page, School = [name of school], Term = [current year], click on “School.” (Hereafter, abbreviated as “Go to Start Page > School Setup.”)
2. Click on “Years & Terms.”
3. Click on “New” to set up a new schoolyear. (Set up the whole year first.)
4. Now you should see the year you just created in the Years & Terms table. Click on “Edit Terms” to see the Term Setup for that year. Click on “New” to set up the first semester.
    a. To find out the “Import File Term #,” click “Submit” and then click on the name of the term you just created. The Import File Term # will appear directly below the blank field. Type in the number you see. The first term you set up will probably be 1601 and subsequent terms 1602, 1603, …
5. Repeat step 4 to set up the second semester and all of the four quarters (or trimesters if applicable).
    a. Make sure that there are no gaps between the start and end dates you enter – i.e., the first day of the second semester must be the day after the last day of the first semester, etc.

Periods and Days (Required)

1. Go to Start Page > School Setup > Years & Terms.
2. Click on the upcoming school year to get to the Edit School Year page.
3. Enter the number of periods per day and the number of unique Schedule days you have. A unique Day means a unique set of classes that day.
   a. For example, if the same six classes are offered every day, but Art is the seventh period of Monday, Wednesday, and Friday, but Music is the seventh period of Tuesday and Thursday, then you have two unique schedule Days, because only two sets of classes exist.
   b. If you have the same seven classes every day, but Friday is an abbreviated bell schedule, then you still only have one unique schedule Day; the different class times can be set through two unique Bell Schedules (below).
   c. Don't count lunch as a period.
4. Go to Start Page > School Setup > Days.
5. The number of Cycle Days that you see displayed in the table will depend on the number of days you specified in step 3. The days will have default names (A, B, C). Click on the name to set the Day Name and Abbreviation to what you want.
6. Go to Start Page > School Setup > Periods. The table will display the number of periods you specified in step 3. Click on each default period name to rename.
7. Set the sort order according to the order that you want the periods to display in drop-down menus throughout the system.

A note about Sort Order: Sort order is customizable for many of the subsequent settings. Whenever you see sort order, it always refers to the order that those values will be displayed wherever they are displayed in the system. You may choose to display in alphabetical order or to put the most commonly selected values at the top. If one value comes up the majority of the time, it makes sense to assign it number 1 in the sort order.

Next School (Required)

1. Go to Start Page > School Setup > Next School.
2. Click on "New" to create a Next School record with your school's name and number.
3. Click on "New" to create a Next School record with the school in the system that your students will move on to when they graduate your school. If there is no known school, then call the record "Graduated Students" with School Number "999999."

Attendance Preferences : Preferences (Required)

1. Go to Start Page > School Setup > Preferences (under "Attendance" heading).
2. Fill out the form according to Form B.
   a. Both "Meeting" and "Daily" should be checked for "Recording" if you want teachers to take attendance for their classes. If only "Daily" is checked, only the office can input attendance. USI will be taking attendance in the first class of each day and then the office will be clarifying the attendance codes after calling parents.
   b. "Audit attendance records" should be unchecked.
   c. Check "two-way" for "Meeting and daily attendance bridge," which means that records will be synched in both directions when changed by either teachers or the office.
   d. "Show Saturday and Sunday on attendance views" = unchecked
   e. "Interval Duration" = 0 (by default)

Full-Time Equivalencies (FTEs) (Required)

1. Go to Start Page > School Setup > Full-Time Equivalencies.
2. Click "New" to create New FTE Code(s) according to Form B.
   a. Set "Default Attendance Mode" to "Daily."
   b. Set "Default Attendance Conversion" to "Code to Day."

Attendance Code Categories (Required)

1. Go to Start Page > School Setup > Attendance Code Categories.
2. Click "New" to create New Attendance Code Categories according to Form B.
   a. Excused, Tardy, and Unexcused must be programmed in. Other codes (such as Suspended) are optional per school.

Attendance Codes (Required)

1. Go to Start Page > School Setup > Attendance Codes.
2. Click "New" to create New Attendance Codes according to Form B.
   a. Add the ones that teachers can assign first (usually Present, Tardy, and Absent). Excused, Tardy, and Unexcused must be programmed in. Other codes (such as Suspended) are optional per school.
   b. Assign points facilitates searching based on absences/tardies later on. For instance, assigning 1 point for each absence and 0.33 points for each tardy (if three tardies equal one absence) allows you to search later for students with attendance points values greater than 3 to quickly pull up all students with more than three absences.

Attendance Conversions (Required)

1. Go to Start Page > School Setup > Attendance Conversions.
2. Click "New" and name the New Attendance Conversion Regular Day.
3. You should see one or more FTE's in the table under Regular Day Conversion, based on what you set up in the Full-Time Equivalencies setup table above.
4. Click on "(NONE)" under Code for the FTE that you want to edit.
   a. Set "Day Attendance Value" to 1 or 0 for each Attendance Code depending on whether you get ADA credit with the state for that Attendance Code.
   b. Set "Comments" to "Full-day attendance credit" for 1's and "No day attendance credit" for 0's.
5. You don't need to set the "Period" or "Time" items, so "(NONE)" should remain underneath those columns for your FTE to indicate that they remain undefined.

Bell Schedules (Required)

1. Go to Start Page > School Setup > Bell Schedules.
2. Click "New" to set up new Bell Schedules according to Form B.
3. Click "Edit Schedule" next to each Bell Schedule. Click each period name to edit the period.
   a. Set "Counts for ADA" to be checked for all periods.
   b. Set "Use for Daily Attendance" to be checked only for the homeroom period. **This box must be checked for the Attendance function to work.**
   c. Set "Default Time In" to the schoolday's start time and "Default Time Out" to the schoolday's end time. Specify "AM" or "PM" for the fields to work.

Activities Setup (Required)

1. Go to Start Page > School Setup > Activities Setup.
2. The database will be pre-set with Activities required by CREDO. Only add New Activities if there are additional activities that you want to track.

Fee Types

1. Go to Start Page > School Setup > Fee Types.
2. Click on "New" to create new Fee Types according to Form B.
3. If you want to levy one of the Fee Types that you just created (for example "Uniform") at the School level, there are additional steps. At the top center of the page, change "School" to "District Office."
4. Go to Start Page > District Setup > Schools/School Info and select the school for which you want to assess the fee.
5. All the way at the bottom of the "Edit School" page, find the heading "School Enrollment Fees" and click the "New" button. The only Fee Types available will be the ones that you associated with the "School" Fee Category in step 2.

Miscellaneous

1. Go to Start Page > School Setup > Miscellaneous (under the "General" heading).
2. Set the form values according to Form B.
   a. Set "Default term level" to "Shortest possible."
   b. Generally, leaving all the checkboxes checked is desirable.

Final Grade Setup (Required)

1. Go to Start Page > School Setup > Final Grade Setup.
2. Click on "NEW" under the school year heading to create New Final Grades. Do not set up Final Grades under the semesters or the quarters.
   a. You probably will want to create one for the Year and for each quarter. The names must be a letter following by a number.
   b. You may also want to define a final exam period. If so, shorten the length of your Q4 by the length of the final exam period (F1) – the dates for the quarters and the final exam period must not overlap and must connect to equal the dates for the whole year.
   c. The only settings to define are "Name, Starting Date, Ending Date." The others can be ignored.

Current Grade Display

1. Go to Start Page > School Setup > Current Grade Display.
2. Set the "Source of Data" to "PowerGrade" for the current grading period. Set already-passed grading periods to "Historical." Don't set future grading periods. This page should be updated at the end of each quarter.
3. Set "Show Citizenship Grade" to checked.

GPA Student Screens

1. Go to Start Page > School Setup > GPA Student Screens.
2. Set "Type of Current GPA to display under schedule" to "Simple."
3. Clear the fields to blank for any Weighted GPA item, assuming that your school doesn't calculate weighted GPAs.
4. If your school does standards-based grading, you can wipe out all of the fields, since the GPA calculations are not relevant.

Honor Roll

1. Go to Start Page > District Setup > GPA Calculations > Calculation Methods.
2. Click "New" to define a New Calculation Method. Set up for new methods: Q1 Honor Roll GPA, Q2 Honor Roll GPA, Q3 Honor Roll GPA, Q4 Honor Roll GPA (or T1, etc. for trimesters).
   a. Copy the formula from the "Simple" GPA Calculation Method and paste it into the "Formula" textbox.
   b. Set "Terms" to the respective term (Q1, Q2, Q3, or Q4)(T1, T2 or T3).
   c. Set "School years" to the current year (just "2006" for 2006-07, etc.)
   d. Set "Only include grades" to check "that count in GPA" and "that count in honor roll."
3. Go to Start Page > School Setup > Honor Roll.
4. Click "New" to create a New Honor Roll Method.
5. Click on "Levels" next to the Honor Roll Method you want to configure.
6. Click "New" to create a New Honor Roll Level.
   a. Evaluation order is the order in which the database will look at student records to see if they measure up. The highest honor level should be set to 1. If a student does not meet the qualifications, the database will evaluate to see whether the student meets the criteria for the honor roll level set to 2, and so on.
   b. GPA Calculation Method = [method you just defined in step 2]
   c. Use the fields under the "Grade Options" heading to define the Honor Roll criteria. For example, students with all A's can be set by defining "Student must have <u>Only</u> of these grades <u>A+,A,A-</u>" (no spaces in the second string)

Calendar Setup

1. Go to Start Page > School Setup > Calendar Setup.
2. The Calendar Setup page displays a row for each day in the first month of your schoolyear with links across the top for pages for each month in the schoolyear. Choose the settings for each day.
   a. Day = the day type that corresponds to that date.
   b. Schedule = the bell schedule that applies to that date.
   c. Leave all of the "Track" checkboxes checked by default.
   d. Leave "In Sess" checked for the days that are in session and uncheck it for the days that are not.
   e. Set "Memb Value" to 1 for the days that are in session and 0 for the days that are not.
   f. Set the "Type" to the most appropriate value (In Session, Holiday, Vacation, Professional Development).
   g. Leave Saturdays and Sundays blank by default.
3. Do not switch off the page until you have clicked "Submit" at the bottom to save your changes; otherwise, you will lose all of your changes.
4. After clicking "Submit," click "Back" to get back to the page and then click the next month to repeat step 2.

Note: Setting up the calendar correctly is very important as it impacts the Attendance function; therefore, take the time to verify that the calendar has been inputted accurately.

5. Click "Verify # of school days in the current term" at the bottom of the page to view all of the days in which school is in session. Compare this list carefully with your actual school calendar to verify that it is all correct.

   a. Alternatively, if you want to see the list of in-session days in smaller chunks (which may be easier to read)—Click on "Term" at the top center of the page, click "Verify # of school days in this term," and then select a quarter or the year from the drop-down menu.

Importing Big 6 Files (General)

Below are the general steps for importing each of the Big 6 files. It is mostly the same for each file, with specific departures described below.

1. Prepare the Excel file for import.
   a. Make sure there is only one header row.
   b. Delete all blank but formatted rows (or else, PowerSchool will try to import them).
   c. Any cell data with a string of values separated by commas cannot have spaces in it. Correct if need be.
   d. Save As… Choose "Text (Tab Delimited)" as the file type.
   e. Ignore error messages; click "Yes" to proceed.
2. Go to Start Page > Special Functions > Importing & Exporting > Quick Import.
3. Set "Table" to the following values for each Big 6 file:
   a. Students (Big 6 file) to Students (Table)
   b. Staff to Teachers
   c. Rooms to Rooms
   d. Courses to Courses
   e. Sections to Master Schedule
   f. Enrollment to Student Schedule
4. Click "Browse" to choose your Text Tab Delimited file you just saved in step 1 as the "File to import."
5. Leave "Suggest field map" as checked.

6. Click "Import."
7. PowerSchool will suggest fields to map each spreadsheet column to. Double check the mapping to ensure it is correct.
8. Set "Exclude first row" to checked.
9. PowerSchool will start printing out (on screen) the status of each row – imported successfully or an error message in red.
10. Copy or print the Import Log and proceed to troubleshoot any red error messages. Usually an error message refers to a problem in the way that the spreadsheet is set up.
11. Validate the data (as described below).

Import the Big 6 files in the following order (first to last): Staff, Rooms, Students, Courses, Sections, Enrollment. Validate the data after each import. It is especially important to validate Sections data carefully before doing Enrollment, since a large amount of time and work is required to undo mistakes.

Importing the Student File

Follow the general steps above, but during the spreadsheet prep, look up the FTEID value by following these steps:

1. Go to a new website, URL = http://64.195.238.157/admin/tech/usm, to get to Direct Database Access (for NY users) - follow with NJ address for NJ users.
2. Set "Current Table" to "FTE (159)."
3. Click "Select all … records in this table" button. in this table" button.
4. Click "List View."
5. Note the number under "ID" corresponding to the FTE_Value that you set up during the initialization process for your school.

Importing the Sections File

The Sections file cannot be imported until the Course file has been inputted. Also, due to the set up of the system, a PowerSchool Implementation Specialist must mark all of the Courses as "Active" before you can upload the Sections file.

Validating Staff Data

It is important to validate staff data to ensure that their information has been loaded correctly. The steps to take to validate staff data are as follows:

1. Go to Setup>Staff.
2. Select the magnifying glass to search for all staff.
3. Verify the list of staff is correct.
4. Under "Functions", select "List"
5. Select the field names you would like to verify for staff information and select "Submit."

Validating Room Data

1. Go to Setup>School.
2. Go to Scheduling > Rooms and verify the list.

Validating Student Data

After you have imported the student data file, spot check the records of students and then do a closer inspection of student lists.

<u>A. Check total enrollment numbers</u>

1. Click on "Enrollment Summary" on each school's home page to see a summary of all of the students whose information you have imported into this school.
2. Check that each "TOTAL IN GRADE" number matches your actual enrollment. Check that the total numbers by grade, ethnicity and gender (denoted by blue and pink text) are also correct.
3. Click on any of the highlighted numbers on this report to see rosters of student names and verify the correct students are included.

B. Spot check individual student data

1. From the Start Page, click on the blue magnifying glass. Then, select a student.
2. It is recommended to check the following areas:
   a. Addresses
   b. Demographics Modify
   c. Parent/Guardian
   d. CREDO Student Info
   e. Transfer Info (under the "Enrollment" header) – Click on the hyper-linked entry date. This is where you would change the entry date, exit date, and grade level.

C. Inspect student data in detail

1. From the Start Page, click on the number for the grade level number below "Browse Students" to display a list of students in that grade.
2. Near the bottom of the Student Selection page, select "List Students" from the "Select a function for this group of students" drop-down menu.
3. Enter the following information (and any other fields you want to cross-check) in the following format and click "Submit":

Col	Field Name	Column Title
1	Lastfirst	Student name
2	DOB	Date of birth
3	Gender	Gender
4	Grade_Level	Grade

4. Print this screen. Make notes on the page (e.g. the student isn't enrolling at your school, the student was retained, the student's name is spelled wrong, etc.)
5. Go into PowerSchool and make those changes as needed. (From the Start Page, search for and select him/her and change via the Demographics Modify page.)

To update a subset of student records

When you imported the Big 6 Student file, you imported all information about all students, but it is possible to import selected values for only a subset of students as follows:

4. Setup a spreadsheet with columns for the data that you wish to update.
5. Ensure that Student Number is one of the columns (the student's First Name and Last Name are not necessary).
6. Set "Update only if not adding new records" to checked. **This box must be checked** for the import to result in an update to existing students; if it is not checked, then the system will consider the import as new students and create duplicate records.

Validating Course Data

To validate that the school has all of the required courses:

1. Select Setup>School>Courses
2. Select View Master List
3. Check that every course required for the school has a checkbox selected.

Validating Section Data

Before proceeding to import section enrollments or "Mass Enroll" students, you absolutely must check that everything is assigned correctly to the sections. In order to mass enroll sections, USI has set up "dependent sections" based off of the advisory or homeroom classes. Each homeroom has dependent sections assigned to it that include the courses assigned for that advisory.

To validate this information:

1. Select Setup>School>Sections
2. Select your homeroom or advisory class
3. Verify that the correct teachers are assigned to the homeroom and that the courses listed in the dependent sections are the right courses for that section/homeroom.
4. If they are not, you should either update the dependent sections, or change the teacher, but DO NOT change the section # as that is uniquely assigned.

Validating Enrollment Data

If you have imported Courses, Sections, and Section Enrollments, each school's Master Schedule should be correct.

1. Click on the "Master Schedule" link on each school's Start Page to confirm that this is the case.
   a. Note that this Master Schedule is term-specific: if you want to see the schedule for another term, click the "Term" link at the top of the page to select a different term context.
2. Some of the information to review using the Master Schedule includes:
   a. An alphabetical list of teachers who are slated to teach during this term
   b. The course and section that each teacher teaches each period
   c. The number of students currently enrolled in each section and the maximum enrollment for the section, if you imported that information (e.g., 22/30 indicates 22 students are enrolled out of a maximum possible enrollment of 30). This will change a bit once you place kids in "homerooms" (advisories).
   d. The roster of students enrolled in each section (this requires you to click on the highlighted enrollment number: e.g., the "22" in the example above)
   e. Details on the section itself (this requires you to click on the highlighted course+section number).

Validating Attendance Settings

For the Attendance function of PowerSchool to work properly the information inputted from Form B must have been recorded properly. The following are steps to take to validate the data that enables attendance:

1. Click on "Term" at the top center of the page. Select a quarter from the drop-down menu. Click back to get back to the Change Term page.
2. Click "Verify # of school days in this term" to view a list of all of the days programmed as in session in PowerSchool.
3. Compare this list carefully with your actual school calendar to verify that it is all correct.
4. Go to Start Page > School Setup > Bell Schedule.
5. Click "Edit Schedule" for each Bell Schedule.
6. Click on the "A" (Advisory) period and double check that "Use for Daily Attendance" is checked.

IV. Reports

Overview

As mentioned in the Report Card section, PowerSchool has the capability to generate a wide variety of reports by importing designated pieces of data from teacher grade books, system settings, student demographic files, and other locations in the system. Certain reports, such as a New York State LEAP Report, will already be stored in your PowerSchool reports queue (these are in the process of being uploaded). Others require custom creation using HTML, and will be prepared in time for their use by a contractor managed by USI. Over the next year, USI will be layering additional technology over PowerSchool which will assist in the generation of more sophisticated reports.

State Reports

PowerSchool's support team is in the process of updating the state reporting templates for both New York and New Jersey. Each of these reporting templates requires that certain pieces of student data be loaded into PowerSchool in order to be able to accurately fill in the needed fields. For example, the New York LEAP report requires that student funding sources be identified. USI will work with you this year to explore the use of this functionality and the soundness of the PowerSchool State reports. If these templates are deemed usable, USI will work with you to gather and organize the necessary data for input into PowerSchool. CREDO has produced Excel templates and a set of guidelines for organizing the needed data. Check the Jumpstart website for more information.

Tool: CREDO *Jumptart* Website

Report Cards

To be defined in September

Transcripts

To be defined in September

Progress Reports

To be defined in September

Special Education Reports

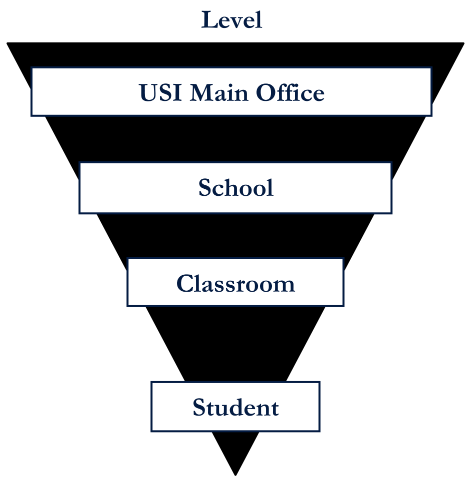
The USI Operations Team will be working directly with the Special Education Service Provision team in extracting the necessary information from PowerSchool for their reporting needs.

V. Access and Security

Overview

By now, you have hopefully come to a general understanding of each of the major aspects of PowerSchool that will be in use at your school this year. One good way to keep these functionalities organized in your brain is to consider it in terms of how users will be accessing the system. The diagram below lays out the access relationship for one USI school.

Given that student data and special education information are confidential, PowerSchool is configured so that very specific levels of security and page permissions are designated for each user of the system. The differentiating levels of access are based on user needs and responsibilities in PowerSchool, and are intended to safeguard the integrity of the data. Additionally, school-based personnel will only be able to access information for the students enrolled at their particular school. Essentially, access levels go from very broad at the USI level for ease in supporting all schools and staff, to very narrow at the classroom level for a teacher's ease in focusing only on his/her class:



- USI Main Office personnel will be able to view and modify most screens, but will only do so if and when needed
- School-based personnel will be able to view and modify according to their responsibility area
- Teachers will not have access to the PowerSchool administrative site, they will view their students' information through PowerGrade
- A student and his/her family will only view certain information through PowerSchool Family

Security access "Hierarchy"

USI has set up your initial security settings based on the schematic above, and the process needs described in the previous sections. You are responsible for updating and maintaining the security settings for the staff at your school. Keep in mind that certain pieces of Special Education, CREDO, and student information need to be kept confidential. If mid-school year, your principal asks you to give a teacher access to the administrative portion of PowerSchool, make sure carefully delineate his/her security settings. Do not give out your user ID or password to anyone! Encourage others to follow suit.

Adding a new user to PowerSchool

1. From the PowerSchool Start Page, click Staff in the Setup section of the Start page.
2. Under Other Options, click New Staff Entry.
3. Enter the information for the new staff member. At a minimum, you must include:
    - Name
    - Preferred Name
    - Email Address
    - Title
    - Gender
    - Ethnicity
    - ID: set using the staff member's first and last initial in combination with his/her year of hire. For example, Cate Swinburn was hired in 2006, so her ID becomes "cs2006."
    - Staff status: all non-teachers are "Staff"

4. Scroll down to the bottom and click Submit.
5. The generic Staff screen will appear.
6. Click Security Settings in the left pane.
7. Fill in the fields on the Security Settings page according to the staff member's role.
   - Create an Admin Login ID of first initial and last name (e.g. cswinburn)
   - Create an initial password of "123"
   - Select the school(s) that the new staff member will be permitted to access.
   - Assign a Group (consult the Security Protocol to decide which group to assign him/her to).
   - Skip the IP addresses field.
   - If the staff member will have admin access, you must select Yes from the Login to administrative portion of PowerSchool? drop down. Otherwise, leave it at No.
   - Fill in the rest of the fields only if the new staff member is a teacher.
8. Click Submit.

Placing a current user in an existing user group

One of the simplest ways to modify and maintain user security is through the user groups in PowerSchool's administrative portion. This allows you to delineate security settings for each group such as what each member is allowed to view, but not modify.

1. From your Start Page, click System in the lower left corner
2. Scroll down and click Security
3. Click Users by Group
   - In the second column, you will see all staff at your school that currently have administrative access to PowerSchool. In the first column, you will see the group to which they are assigned.
   - If you would like to assign a user to a new or different group (depending on whether he/she is already assigned to a group), click his/her name, scroll to the Group line, and select the desired group from the drop-down menu.
   - Click Submit

Creating and defining a new security group

If you do not see a pre-existing group for the user you're working with, you'll need to create a new group.

1. From your Start page, click System in the lower left corner.
2. Scroll down and click security.
3. Click Groups.
4. Select one of the generic, yet-to-be used groups listed in the second column (e.g. Group 5).
5. Name the group logically (e.g. SpEd Service Providers, Office Staff, Administrators), keeping in mind that the people you plan to place in a group will all have the same level of functionality. In other words, do not place your Special Education teacher in the same group as yourself; you will have full modification powers, she/he will have limited modification powers.
6. Select the desired level of default access from the drop-down menu.
7. Select the desired level of security from the Modify Schedules menu.
8. Do not grant anyone Master Scheduler access unless you clear with USI Home Office.
9. Select which log types the members of the group will have access to.
10. Select which student screens the members of the group will have access to.
11. Click submit.

Modifying access to specific pages (required for non-student screens)

Screens in PowerSchool that are not associated with student information are not included on the list of options when configuring security groups. This is an issue when considering some of the confidential CREDO information about teachers which is stored in the system, and may be an issue with Special Education screens. To restrict access to certain staff or student screens, you must go through and modifying page access permissions page-by-page. Much of this has been done for you already. As you customize screens and add new components to PowerSchool over time, however, you may need to make some changes.

1. From the Start Page, click System
2. Scroll down to the bottom and click Security
3. Click Access to Page Permissions
4. Select On from the Modify Page Permissions drop-down menu
5. Click submit
6. You will see that "modify page permissions for this page" is now at the bottom of your screen. It will also sometimes be in the column on the left side of your screen.
7. Return to your Start Page
8. <u>If modifying access to a staff page:</u>
   - Select Staff from the left side of your screen
   - Select one staff member
   - Click on the name screen you want to modify (e.g. CREDO Faculty Info) from the left pane of your screen
   - Click "modify access privileges for this page
   - Designate the levels of access you want each group to have for that particular page. You may want some groups to have no access, so select "none."
   - Scroll down and click Submit
   - You will get a message stating that the changes have been recorded, and an option to go back. Clicking Back will return you to the same screen.
   - From there, you can freely navigate to the screens you want to see.
9. <u>If modifying access permission to a student page:</u>
   - Search for and select the student from the Start Page.
   - Click on the name screen you want to modify (e.g. Special Education Compliance Screen) from the left pane of your screen.
   - Click "modify access privileges for this page."
   - Designate the levels of access you want each group to have for that particular page. You may want some groups to have no access, so select "none."
   - Scroll down and click Submit.
   - You will get a message stating that the changes have been recorded, and an option to go back. Clicking Back will return you to the same screen.
   - From there, you can freely navigate to the screens you want to see.

Granting a staff member admin access

1. From your school's Start Page, click Staff in the lower left corner
2. Search for and select the staff member whose security settings you need to modify
3. Click Security Settings on the left side of the screen
4. Create an admin login ID and generic password (instruct him/her to change it later)
5. Select the school/s for which he/she may have admin access.
6. Select which group you would like him/her to be associated with (see above).
7. Select Yes for the Log in to administrative portion of PowerSchool drop down.
8. Click "Submit."

Note that this security setup can also be done when first enrolling the staff member in PowerSchool.

VI. Tools Summary

Tool: Key Dates for PowerSchool Responsibilities

Date	Task	Applicability
Specific deadlines (see below for ongoing deadlines)		
8/11/2006	Run lists or reports by grade in PowerSchool-- verify that all enrolled students are listed and information is correct.	All Schools
8/11/2006	Upload to PowerSchool the names and any demographic information you have for students not yet listed in system.	All Schools
8/16/2006	Use Section Enrollment Template from PowerSchool to "enroll" students in classes based on lists provided to you by Principal/Teachers	All Schools
8/16/2006	Verify teacher-by-teacher and class-by-class that PowerSchool is configured according to the most current school schedule. Make corrections as needed.	All Schools
8/18/2006	Run class lists for attendance-- in case teacher use of PowerGrade in class isn't working (run before Day 1 of school)	All Schools
8/18/2006	Run lists or reports by grade in PowerSchool-- verify that all enrolled students are listed and information is correct.	All Schools
8/18/06	Train Administrators (Principal and Managing Director) on use of PowerSchool for searching (log entries and students), running reports, and logging conferences	All Schools
8/18/2006	Train Dean of Students or School Leader on use of PowerSchool for documenting disciplinary issues, searching for students, logging conferences, and running reports.	All Schools
8/18/2006	Train office staff in use of PowerSchool office systems	All Schools
8/18/2006	Upload to PowerSchool the names and any demographic information you have for students not yet listed in system.	All Schools
10/15/2006	Run CREDO check-ups in PowerSchool, collect correct student and staff information, adjust data as needed (reference "USI Internal" Big 6 file from summer)	All Schools
11/1/2006	Send home student questionnaires to gather "correct" CREDO data for the fields that were invented over the summer. Consult your Big 6 templates for the columns highlighted in purple at the top.	All schools.
12/1/2006	Data in PowerSchool must be complete, accurate, and up-to-date. Run CREDO Data Extracts and email file to CREDO.	All Schools
4/15/2007	Run CREDO check-ups in PowerSchool, collect correct student and staff information, adjust data as needed (reference "USI Internal" Big 6 file from summer)	All Schools
5/1/2007	Data in PowerSchool must be complete, accurate, and up-to-date. Run CREDO Data Extracts and email file to CREDO.	All Schools
7/30/2007	Copy test score data disk(s); mail copy to CREDO	All Schools
8/1/2007	Revisit your school's PowerSchool "Form B" with Principal-- update as needed (schedules, activities, etc.)	All Schools

8/1/2007	Set dates for new school year in PowerSchool	All Schools
8/15/2007	Create courses in PowerSchool (Big 6 Templates-- course, section)	All Schools
8/15/2007	Enroll new students and teachers in PowerSchool (upload using Big 6 templates-- student and staff)	All Schools
8/15/2007	Enroll students in courses in PowerSchool (Big 6-- section enrollment)	All Schools
8/15/2007	Verify that all classrooms are listed in PowerSchool-- upload new ones (Big 6 Template-- rooms)	All Schools
Ongoing/ Rolling Deadlines		
As available	Order test score data disk(s) from testing company for norm-referenced test(s) and state test(s)	All Schools
As available	Upload test score data to PowerSchool	All Schools
2 weeks before report card deadline	Remind teachers of upcoming Report Card deadline and policies. Send out PowerGrade/PowerSchool report card "cheat sheet."	All Schools
2 weeks before report card deadline	Run report in PowerSchool to anticipate which teachers are behind in grading	All Schools
3 days after RCs go out	"Permanently Store" grades in PowerSchool (start>system admin>permanently store grades) after each grading period	All Schools
5 days after end of school year	"Permanently Store" grades in PowerSchool for end of school year	All Schools
One month prior to accepting applications	Modify the CREDO Registration Forms to meet school needs	All Schools

☎ Tool: Key Contacts for PowerSchool

Contact	Details	Responsible for	Applicability
Claire Thompson	CREDO Guide idclaire@earthlink.net	Assisting USI through the pre-implementation process	ALL
PowerSchool CREDO Support Site	1-866-434-6276 press 3, x 7045	PowerSchool CREDO customers are supported by a designated team of Support Specialists specifically focused on the unique use of PowerSchool for the CREDO project during PowerSchool Support's normal business hours of 4:00 a.m. to 5:00 p.m. Pacific time, Monday through Friday. Have your school's customer # ready.	ALL

Tool: Filing/Reporting

File	Location	# Years to Be Filed	Applicability
CREDO Walton Reporting Deadlines	Included in Power School Support disk	3	All

Further Resources

Resource	Location	For What?	Applicability
CREDO Jumpstart	www.credojumpstart.org	CREDO-Specific questions pre-, during-, and post-implementation	All schools
PowerSchool Customer Support	https://support.powerschool.com (use your assigned login)	PowerSchool questions and tools of all varieties	All
PowerSchool Users Group (PSUG)	http://groups.yahoo.com/group/PSUG/	PowerSchool file-sharing, querying, and problem-solving	All
PowerSchool Customer Support Site Guide	Included in Power School Support disk	Orienting self to Support Site	All schools
PowerSchool Final Grade Setup Manual	Included in Power School Support disk	Initial final grade setup for school year and when making changes	All schools
PowerGrade PowerSchool Teacher Manual	Included in Power School Support disk	Process instructions and problem-solving	All schools
PowerSchool Initial Training Workbook	Included in Power School Support disk	Process instructions and problem-solving	All schools
PowerGrade and PowerSchool Teacher Cheat Sheets	Included in Power School Support disk	Process instructions and problem-solving	All schools
PowerSchool Form A – USI Settings	USI Operations Manual	Revisiting district settings	All schools
PowerSchool Form A – School Settings	USI Operations Manual	Revisiting school settings	All schools