

# PowerSchool SIS Initial Product Training

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PowerSchool Student  
Information System



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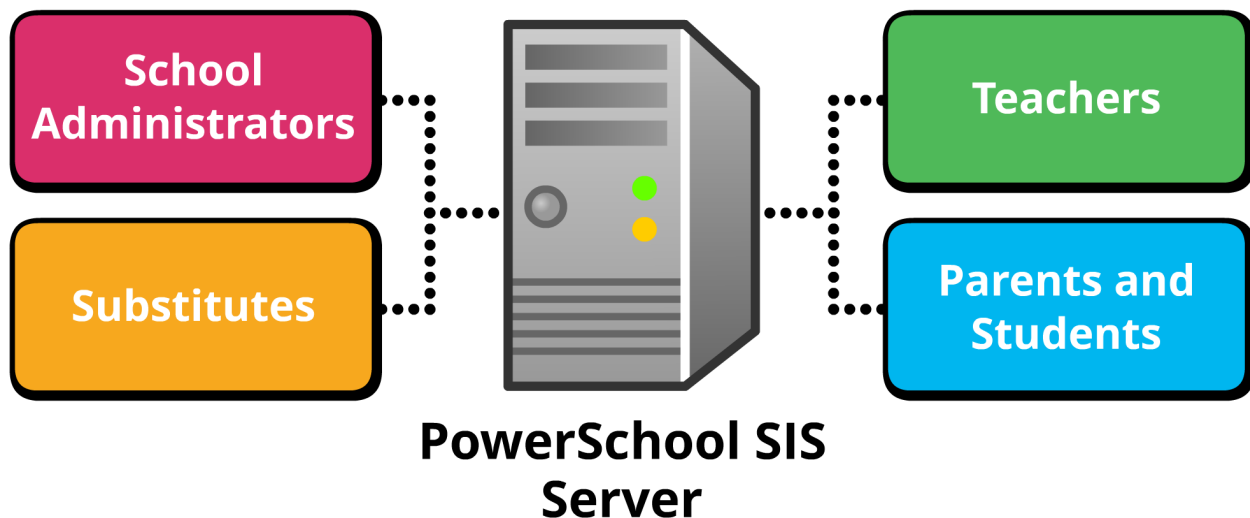
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## Initial Product Training

### Getting Started

Welcome to PowerSchool's Student Information System (SIS)! Use PowerSchool SIS to access and maintain your student, staff, and schedule information. The PowerSchool SIS is a relational database application that runs on one or more servers. Use PowerSchool SIS to facilitate student information management and communication among school administrators, teachers, parents, and students.



To sign in to PowerSchool SIS, you need the following information from your PowerSchool SIS administrator:

- The address of your PowerSchool SIS server
- Your username and password

Most school staff will either be categorized as an administrative user or a teacher user. In this document, you'll learn about PowerSchool SIS from the perspective of an administrative user. Begin by signing in to PowerSchool SIS:

1. Open a web browser, and enter the address of your PowerSchool SIS server followed by `/admin`
2. Enter your username and password
3. Click **Sign In**

### The PowerSchool SIS Start Page

The PowerSchool SIS Start Page consists of four areas: header, navigation toolbar, main menu, and main page.

The header includes the PowerSchool SIS logo, the name of the staff member associated with the sign-in credentials, a link to the Help menu, and a link to sign out of the system.

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The navigation toolbar includes the School menu, the Term menu, the navigation path, and navigation buttons. Use the School menu to switch between the schools that you have access to and the district office if you have district-level access. Use the Term menu to change scheduling terms.

Use the main page area of the Start Page to conduct student, staff, and contact searches. You can also preview what features were recently added to your version of PowerSchool SIS in the What's New section.

Use the links in the main menu of the Start Page to access other PowerSchool SIS features. The main menu is separated into sections that group similar tasks together.

The screenshot displays the PowerSchool SIS Start Page. At the top, the **Header** area includes the PowerSchool logo, a user welcome message for Pat Ochoa, and links for Help and Sign Out. Below the header, the **Navigation Toolbar** shows the current school (Apple Grove High School) and term (18-19 Semester 2), along with navigation icons. The **Main Menu** is located on the left side, categorized into Functions, Reports, People, and Setup. The **Main Page** area is the central content area, featuring a search bar with tabs for Students, Staff, and Contacts. It includes a search filter section with options for Advanced and Include Remote Enrollments, a View Field List link, and an alphabetical index (A-Z). Below the search bar, there is a section for Current Student Selection (0) with a message indicating the selection is empty and buttons for Select By Hand and Print Reports. At the bottom of the main page, there is a What's New section with a link to read more about the latest feature release.

In the header area, click the PowerSchool SIS logo to return to the Start Page from other pages within PowerSchool SIS. Also contained within the header section is the PowerSchool SIS Help menu. Click **Help** to access system help and state reporting help such as definitions, explanations, how-to steps, and videos related to the content that you are viewing. The system Help menu contains topic index, alphabetical index, search, and video tabs. Open the Help menu from any page in PowerSchool to view information about the current page.



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Next to the Help menu is the Sign Out link. Always sign out of PowerSchool SIS when you leave your workstation or are done using the program. The system administrator can set a default value to determine how many minutes of inactivity are allowed before the user is signed out of the system automatically. To change the default number of minutes, from the Start Page, click **System > System Settings > Security**.

In the navigation toolbar area, the first feature is the School menu. To open the School menu, click **School**.

Use the School menu to change the school you are working with or to work from the District Office. The name of the default school appears when you launch PowerSchool SIS. Assign a user's home school on the staff member's Security Settings page.

Not everyone will be able to change schools using this menu. For the School link to be active, a user's "Admin Access and Roles" tab on the Security Settings page must include more than one school in the "Roles and Schools" area.

The next navigation toolbar feature is the Term menu. To open the Term menu, click **Term**. Use the Term menu to select a school year and term. Change the term when you need to work with a certain term, such as Semester 1, or when you need to work with a different school year. The default term level is based on district, and sometimes school, settings.

The selected term impacts what you see on many PowerSchool SIS pages, as well as the data that you can modify. Some reports and fields are year specific, so make sure you know what term year you are working with before running reports or changing data.

Once you navigate away from the Start Page to another page, the page names appear in the blue banner in the navigation toolbar. These are called the navigation path, or breadcrumbs. The previous page names appear as links in the navigation path. Click a link in the navigation path to return to that page.

The last feature in the navigation toolbar is a set of navigation icons. Depending on the features enabled in your system, navigation icons appear on the right side of the blue navigation toolbar. Typical examples are the Notifications, Report Queue, and Printer icons.

The exclamation point is the Notifications icon. Click this icon to review information regarding your password security and other system-generated messages.

The icon that looks like a piece of paper with writing on it is the Report Queue icon. Click this icon to view any report requests, or "jobs," that you have in the system report queue.

The icon that looks like a printer is the Printer icon. Use this icon to print the PowerSchool SIS page that you are viewing.

The main menu is divided into five sections with similar tasks grouped together. Use the Functions section to access attendance-tracking options, to view the daily bulletin, to see a summary of the enrollment numbers, and more. Use the Reports section of the main menu to access system and custom reports. Conduct searches or create new records using links in the People section.

Use the Setup section to perform school-specific tasks. The School Setup page contains links to most school-specific settings, and the System Administration page contains links to system-wide setup features.

Use the Personalize page to change your password, to select a default sign-in page, to set an initial student screen, and to change other interface options.

Use the Applications section to launch additional PowerSchool SIS applications, such as PowerScheduler or ReportWorks Developer.

## Searching for Students

At a school, select the Students tab on the Start Page to search for a student or for a group of students. Use the Staff tab to search for school personnel and the Contacts tab to search for adults associated with your students, such as parents, guardians, childcare providers, or relatives. You can search for people in several ways. Next to the students or staff search fields, click the [?] icon to learn more about how to query the database, which is also covered in more detail in the Creating Search Commands section of this document.

## Start Page Basic Searches

On the Students tab, use the links below the search field to search for students by:

- First letter of the student's last name
- Grade level
- Gender
- All currently enrolled students

Notice that when you select either a grade level or gender, the search statement appears in the search field. View a list of students who were selected in a previous search in the Current Student Selection section found below the search links.

On the Staff tab, use the links below the search field to search for staff by:

- First letter of the staff member's last name
- Job type
- Gender
- Staff directory

On the Contacts tab, enter information such as name, phone number, or email address to search for contacts. Use the alphabetical list below the search field to search for contacts by the first letter of the contact's last name. To view only the contacts who have created an access account, check **Only Show Access Accounts** and then click **Search**.

## Searching by Last Name or Student Number

Use the search field to search for students by last name, a portion of the last name, or by the student number. When you enter any letters in the search field, PowerSchool SIS searches last names automatically. If a student is the only one with the last name you entered, the student pages for that student will appear. If the student shares his or her last name with other students in the school, the Current Student Selection area shows the list of students who match your search criteria. To search for a student using his or her first and last name, enter the last name followed by a comma, a space, and then the first name, such as **Smith, Jane**.





Each student in your system is assigned a unique student number. You can search for a student using this number. When you enter numbers in the search field, PowerSchool SIS searches student numbers automatically.

## Using Smart Search

Smart Search makes searching for students and staff faster and easier. Once you start typing in the search field, the auto-completion feature suggests a list of possible students or staff names, student or staff fields, and stored searches in a menu below the search field. In most cases, you don't have to type the complete word.

To select an item, click your choice. If you select a student's name, his or her student pages will appear. If you choose a field name, it will be inserted in the search field. Then you can complete the search command.

The choices in the Smart Search menu are color coded and labeled with an icon, making it easy to identify the item you are looking for in the list of results. Search results for student and staff names are represented with an icon that looks like a person. Search results for student and staff fields are labeled with a database icon. Stored searches are labeled with a magnifying glass icon. Once Smart Search is enabled at the district level, each user can enable the feature for his or her account by clicking **Personalize > Interface > Enable Smart Search**.

Result Type	Icon
Student name	
Staff name	
Student/Staff field	
Stored searches	

## Creating Search Commands

In addition to the search links and the ability to search by last name or student number, you can also search using more powerful techniques. Use search commands to find students who match specific criteria and to search student fields. To see a list of the student fields, click **View Field List** on the Students or Staff tab. For example, search for students who live on Maple Drive, attend Mr. Brook's homeroom, have a lunch balance of less than \$5, or were assigned locker number 220.

A search command is a statement of search instructions and must contain three elements: a field name, a comparator, and a search argument. The search argument is the specific information for which you are searching. For example, if you are searching for all of the students with the last name Metzler, then Metzler is the search argument. The search argument is always the last part of the search command. For example, when the field name is First\_Name, the comparator is equals (=), and the information searched for is Maria, the search command **First\_Name=Maria** searches for all current students who have the first name Maria. In some instances, the search argument maybe be blank, such as **DOB=**. Enter this search on the Start Page to search for any students who do not have an entry in the date of birth field.

Click **View Field List** on the Start Page, or on the Staff tab, for a list of the student or staff fields available in PowerSchool SIS, including any custom fields your district or school created. The field names are hyperlinks that you can click to insert in the search field. Scroll

## Searching for Students

through the list or use the Filter field to locate the name of the field that contains the information you want. Click the field name to automatically enter it in the search field.

Use different comparators to control what information is returned in the search. Note that if a comparator contains letters, you must include spaces between the field name, the comparator, and the search argument. You can find the definitions of the comparators listed below in PowerSchool SIS Help. Use any of the following comparators:

Comparator	Definition	Purpose	Example
=	Is equal to	Returns an exact match of the search argument	<b>First_Name=Robert</b>
<	Is less than	Returns all matches less than the search argument	<b>Grade_Level&lt;11</b>
>	Is greater than	Returns all matches greater than the search argument	<b>Grade_Level&gt;3</b>
<=	Is less than or equal to	Returns all matches less than or equal to the search argument	<b>Grade_Level&lt;=10</b>
>=	Is greater than or equal to	Returns all matches greater than or equal to the search argument	<b>Grade_Level&gt;=4</b>
#	Is not equal to	Returns everything that does not match the search argument	<b>football#</b> (Returns all students who have the Football activity check box selected) <b>football#1</b> (Returns all students who do not have the Football activity check box selected)
in	One of the values is present in the field	Returns all matches that contain one of the search arguments	<b>Last_Name in yang,holt</b> (Returns students whose last name is Yang or Holt)

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Comparator	Definition	Purpose	Example
contains	The value is contained in the field	Returns all matches where the search argument is anywhere in the field	<b>Street contains maple</b>
!contain	The value is not contained in the field	Excludes matches of what you typed	<b>Street !contain maple</b>
@	Wildcard	Fills in unknown information in the search argument	<b>First_Name=jac@</b>

## Inactive Students or Staff

By default, PowerSchool SIS searches for active student or staff records. However, you may want to search for students who preregistered for next year, who transferred or dropped out of school midyear, or who graduated early. Or search for a staff member who is no longer at your school. These records are inactive, but you can locate them.

To access both active and inactive student or staff records, begin your search command with a forward slash (/).

For example, to find all active and inactive students with the last name Ramirez, enter `/last_name=ramirez` in the search field, and press **Enter**. Use one of the following enrollment statuses to limit the search to a certain group of students, such as preregistered students only.

The following table lists the PowerSchool SIS student enrollment status codes:

Code	Description
-1	Preregistered
0	Active
1	Inactive
2	Transferred out
3	Graduated
4	Imported historical

Use these codes to search for students with a certain enrollment status and be sure to use the forward slash (/) in the search command. For example, to find all preregistered students, enter `/enroll_status=-1`. To find all students who have transferred out, enter `/enroll_status=2`.

## Select By Hand

Once you've selected a group of students, modify the students within your selection to create a subgroup that is customized to the task at hand.

To edit the currently selected students:

1. Below the current selection, click **Select By Hand**
2. Clear the Student column header check box
3. Select the students you want in the group
4. Click **Update Selection**

The students you selected are now the current selection.

## Using Compound Searches

You can search the database using multiple search commands simultaneously. When you enter more than one search command in the search field, separate the search commands with a semicolon (;). A semicolon between search commands means *and*. You can conduct a compound search using two different searches, such as `Grade_Level=11;Gender=M` and press **Enter**. Only students that are in the 11th grade and male will be returned. Or conduct a compound search using two different arguments. For example, to find all the students in Mrs. Fullmer's Washington Elementary homeroom class whose street contains Maple, enter `home_room=fullmer;street contains maple` in the search field and press **Enter**. When you wish to search for a blank field, always enter the command that has a value for the search argument first. For example, enter `Grade_Level=12;Next_School=` to find twelfth-grade students who are missing a next school indicator.

## Using Search Codes

A search code is a special type of command that searches by completing a calculation and comparing the results. Using a search code, you can search for students who were born in the month of June, who do not have a Period 1 class, who were active as of November 10, or who are enrolled in the Gifted and Talented program.

Enter search codes as you would any search command in the search field. For example, to find students born on November 10, enter `*birthday=11/10` in the search field and press **Enter**.

Here are some examples of the search codes you'll find in the PowerSchool SIS Field List:

Search Code	Purpose	Example
*birthday	Finds students whose birthday is today, on a certain date, or within a specified date range, such as students with April birthdays	<code>*birthday=today</code> <code>*birthday=4/1</code> <code>*birthday&gt;=4/1;*birthday&lt;=4/30</code>
*as_of	Finds students who were active on the specified date	<code>*as_of=10/31/2018</code>

## Searching for Students

<b>Search Code</b>	<b>Purpose</b>	<b>Example</b>
*not_enrolled_in _period	Finds students who are not enrolled in a course for the specified period	*not_enrolled_in_period=4
*enrolled_in	Finds students who are currently enrolled in a specified course and section	*enrolled_in=MAT1100 *enrolled_in= MAT1100.4
*not_enrolled_in	Finds students who are not currently enrolled in the specified course	*not_enrolled_in=MAT1100
*has_completed_course	Finds students who have at least one historical grade entry for the specified course	*has_completed_course=SOC1200
*has_not_completed	Finds students who do not have any historical grade entries for the specified course	*has_not_completed=ENG1000
*cumulative_credit_hours	Finds students with the specified number of credit hours	*cumulative_credit_hours=12 *cumulative_credit_hours<15 *cumulative_credit_hours>5
*number_of_classes	Finds students who are currently enrolled in the specified number of classes	*number_of_classes=8 *number_of_classes<7 *number_of_classes>5 *number_of_classes#6
*attendance_points	Finds students who have the specified number of attendance points in any course, any course during a specified term, or any course within a specified date range	*attendance_points>9 *attendance_points(S1)>9 *attendance_points (8/28/18,12/19/18)>9
*hours_requested	Finds students who have course requests for the specified number of credit hours	*hours_requested<6 *hours_requested>8  *hours_requested=0
*special_program	Finds students who are enrolled in the specified special program	*special_program=reading recovery

# Searching for Students

Search Code	Purpose	Example
*fee.fee_balance	Finds students who owe money on their student fee accounts	*fee.fee_balance>0

## Understanding Student Pages




When you enroll a new student or select an individual student, the list of student pages appears. Use the student pages to view or enter information on the Demographics page; add parent, guardian, and emergency contact information on the Contacts page; and review and modify transcript information on the Historical Grades page. Also perform functions for a student, such as updating the student's attendance record, printing a report, or remotely enrolling the student into classes at another school. The pages you complete for new enrollees depend on your school's policy, but review each page to become familiar with how and why you would use each one.

Make note of which of the following student pages you are likely to use in your job:


Student Page	Description
Quick Lookup	View a summary of the student's schedule, teachers, current grades, standards-based grades, and attendance. This page mirrors the page parents and students view through the PowerSchool SIS Student and Parent Portals.
Print A Report	View a menu of available reports. Types of reports are separated by dashes. The first group of reports is form letters. The second group of reports is report cards. The last group of reports is object reports.
Switch Student	Quickly access another student's information by entering the student's name in the field on the window that appears.
List	Return to the Student Selection page and view the last group of students you selected. Use the right and left arrows to switch to another student in the group.
<b>Information</b>	
Access Accounts	View and edit a student's portal access information and the information her parents use to create a single sign-on account.
Addresses	View and edit both the student's physical and mailing addresses.
Attachments	View and download documents attached to the student's record.
Contacts	View and modify information of parents, guardians, and emergency contacts associated with a student. Access and modify contact information.



## Searching for Students

Student Page	Description
Custom Screens	View a list of the custom student pages that your district or school has created. Click <b>Student Screens</b> to return to the student pages menu.
Demographics	View and edit the student's basic demographic information, including federal ethnicity, race, and regulatory compliance reporting information.
Emergency/Medical 	View emergency contact information, medical information, and regional compliance reporting information; also add a Medical alert for a student.
Family	View and edit a list of the selected student's siblings or relatives who attend any school that uses your PowerSchool SIS server.
Health	View and edit the student's health and immunization information.
Modify Info	View and edit student information such as family rep, homeroom, locker number, and district and school entry dates.
Other Information 	View and edit miscellaneous student information such as school and course fee exemption status and if the student is excluded from class rank. Also, use this page to add an Other alert for a student.
Student Email	Add or edit the student's email address.
Parents 	View and edit the student's mother's and father's name and daytime contact information. If applicable, view and edit a guardian's name and information. Also add a guardian alert using this page.
Photo	View the student's photo or submit a new one for the student.
State/Province	View and edit information for regulatory compliance reporting that is specific to your region's requirements, if applicable.
Transportation	Use this page to log student transportation information to and from school.
<b>Academics</b>	
Attendance	Use this page to view and change the student's attendance record.
Enter Attendance	Use this page to change a student's meeting or daily attendance for the current week.
Cumulative Info	View the student's GPA and class rank information. Your school decides what information appears on this page.

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Student Page	Description
Graduation Plan Progress	View the graduation plan(s) selected for this student and the courses the student has completed, waived, or is currently enrolled in, to fulfill these requirements. Your district creates the requirements for this page.
Graduation Plan Selection	Use this page to select the graduation plan(s) and post-secondary plan(s) the student is trying to complete.
Graduation Progress	When your district does not use graduation plans, view the list of graduation requirements for your school and the courses the student has completed, or is currently enrolled in, to fulfill these requirements. Your school creates the settings for this page.
Historical Grades	View and modify the student's academic record. Use this page to update historical grades or to manually add grades for students who transfer to your school.
Honor Roll	View a list of all of the times the student made the honor roll.
Standards	Use this page to view the student's progress compared with specific standards outlined by your region, district, and school.
Student Grade Scales	Use this screen to view and edit the grade scales used for the student in his or her classes. (You must first enable access to this page through users' security groups.)
Teacher Comments	View comments that teachers enter in PowerTeacher. The student's internal ID number is listed at the bottom of the page.
Term Grades	View the student's grades as they were stored and reported on his or her report cards during the current or previous years.
Test Results	View and enter the student's test scores on standardized tests, such as the SAT, ACT, or regional norm-referenced tests. Your district determines what tests and scores to track in PowerSchool SIS.
Truancies	Use this page to log incidents of student truancy.
<b>Administration</b>	
District Specific	View and edit information that certain school districts track in PowerSchool SIS.
Fee Transactions	View the student's financial transaction information, including beginning and current balances. Use this page to record new transactions.
Log Entries 	Add, edit, and view log entries that describe a student's behavior, performance, or activity. Use this page to add a Discipline alert.

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Student Page	Description
Lunch	View and edit the student's lunch status information, lunch ID number, and current lunch balance.
Lunch Transactions	View all of the student's transactions in PowerLunch for the current year.
Net Access	View a summary of the number of times that the parent and student have accessed the PowerSchool SIS Student or Parent Portals via the Internet.
SEOP Review	View Student Education Occupation Plan information, most often entered and edited by school counselors.
Incidents	View a list of discipline incidents associated with the student. Use this page to add, edit, or delete discipline incidents.
<b>Enrollment</b>	
Activities	View and edit the activities in which the student is involved. Your school determines what activities are available.
All Enrollments	View a list of all courses in your district that the student has been enrolled in, as well as the date the student entered and exited the course, since your district began using PowerSchool SIS. Select <b>View</b> to see the final letter grade and final percentage, as well as a list of the assignments and scores for the course.
Functions	View a list of functions that you can perform for this student, including printing a report, transferring out of school, re-enrolling in school, transferring to another school, enrolling in remote classes at another school or summer school, and recalculating the lunch balance. Use this screen to enroll a new student living in the same household.
Special Programs	Use this page to enroll the student in a special program, such as a special education-related or gifted and talented program. Your school determines what special programs to track in PowerSchool SIS.
Transfer Info	View the student's current and previous enrollments for each school year your district has used PowerSchool SIS. Use this page to modify a student's FTE or grade level.
<b>Scheduling</b>	
Bell Schedule View	View the student's schedule for the current week.
List View	View the student's schedule for the selected term in a list format.
Matrix View	View the student's schedule for the selected term in a graphical format.

# Searching for Students

<b>Student Page</b>	<b>Description</b>
Modify Schedule	View and modify the student's schedule manually or use the automated scheduler. Also, enter student course requests.
Request Management	Use this page to modify the student's schedule request, override prerequisites, manage course recommendations, and view or modify course requests for the current or upcoming school year.
Scheduling Setup	View and edit the student's scheduling preferences for PowerScheduler and the End of Year process. Use this page to define the student's next year grade level, next year school indicator, year of graduation, and whether PowerScheduler should schedule the student.

Depending on your role and level of access in PowerSchool SIS, you may not have access privileges to view and make changes on some student pages. To learn more about your access rights, see your PowerSchool SIS administrator.

## More About the Quick Lookup Page

The Quick Lookup page is the most frequently used student page because it contains the student's current grade and attendance information. At the top of the page, find the student's name, grade level, and student number, plus any alerts associated with that student. At a glance, view a student's schedule, attendance data for the past two weeks, a list of current and historical course grades, and absence and tardy totals for each term. To obtain additional information about a certain grade, click a letter grade to view which assignments and scores contributed to that grade.

The [i] indicator is visible when there are no assignment scores, but when there may be other scores available, such as standards scores. This indicator means that there is some information available.

## General Demographics

View and modify student information on the Demographics student page. Adding and modifying information on the General Demographics page will add and modify the same information on other pages. For example, modifying the home address changes the student's home address on the Address page. Some fields are not editable, such as the Age, Aggregate days of membership (YTD), and Grade Level fields.

## Transfer Information

View current or past school enrollments on the Transfer Info student page. Notice the entry and exit dates for each school enrollment as well as the name of the school. This page displays a student's complete enrollment history in your district. Notice the note at the bottom of the page. The Transfer Info page is not the page you use to transfer a student out of school. Use the Functions page (under the Enrollment section of the student pages menu) to transfer students out of school.

## All Enrollments

Use the All Enrollments page to view a student's course enrollment history. The page includes past and current term courses as well as courses that a student dropped after attending the class at least once. Entry and exit dates are shown for each course.

Click the column header to change the sort order of the data. To adjust an enrollment date or exit date, click **Edit** for a certain class. To look at final grade information and assignment scores, click **View**.

## Using Group Functions

Once you conduct a search to select a group of students, you can complete a variety of tasks for the students in your current selection using either the Select Function arrow to open the Group Functions menu or by accessing a list of group functions using Special Functions.

When you click the Select Function arrow, the Group Functions menu appears. At the top of the Group Functions menu is the Student Screens option. To save time when navigating through student records, use the Student Screens group function to access the same page for multiple students in a stored selection or group. To use the Student Screens function, first choose a selection of student records from the Start Page. Then navigate to the Group Functions page by clicking **Special Functions** or access the Group Functions menu by clicking the Select Function arrow. Then choose **Student Screens**. On the Student Screens Menu page, select the student page you want to work with and click **Submit**. In the list of student names on the left, click the name of the student whose page you wish to view. Continue clicking each student's name until you are done working with the selected student page.

The rest of the Group Functions menu is divided into sections based on the type of tasks to which the functions correspond. Use the Group Functions menu to perform these tasks for the current group of students:

### Attendance

- Change attendance
- Run the Search By Grades/Attendance report
- Run the Search For Perfect Attendance report

### Enrollment

- View enrollment summary information
- Enroll this group of students into the same special program
- Re-enroll this group of students into school
- Transfer this group of students out of school

### Export

- Use a template to export information about this group of students
- Create a List Students report
- Run a quick export

## Functions

- Manage fees
- Add health screening information
- Assign access account IDs and passwords
- Assign a user ID attribute
- Create a family link
- Modify the data

## Graduation

- Mass assign a graduation plan
- Run graduation progress reports

## Printing

- Run mailing labels
- Run form letters, object reports, and report cards
- Access system reports

## Scheduling

- Evaluate invalid course requests
- Mass enroll the students into a class or classes
- Enroll the students into a remote class or summer school
- Add the next school indicator
- Generate schedules for this group of students
- Add a summer school indicator

## Search

- Create a stored selection
- Search student attachments
- Search based on GPAs

## Validation

- Run address, data, and immunization validation reports

Another way to access group functions is to click **Special Functions** in the Functions section of the main menu. On the Special Functions page, click **Group Functions**.

## Performing Advanced Searches for Students and Staff

A compound search is useful when you're looking for students who meet the same search criteria. However, searching isn't always that simple. Use the Advanced options to refine, add, or subtract from your search results. When you check **Advanced** on the Start Page, you separate your search results from your current selection so you can perform more searches to customize the current selection further.

Begin by performing your initial search. For example, click **11** to work with all 11th graders. Then, check **Advanced**. Below the search field, a Search Results section will appear. Now, perform your second search. In addition to the 11th graders, you need to include a group of 12th graders who are on the decathlon team. Enter `grade_level=12;decathlon#` in the search field and press **Enter**. The results will appear in the Search Results section and will not affect your list of 11th graders in the Current Student Selection section. Finally, click **Add** to add the 12th graders on the decathlon team to the current student selection of 11th graders.

Use the remaining advanced options to do more than just add to the current selection. Click **Within** to find the students who are listed in both the current selection and the search results, and make those students the current selection. Click **Subtract** to find the students who are listed in both areas and remove them from the current selection. Click **Set** to make the search results the current selection and replace the original current selection.

## Creating Stored Searches

If you know you will be using a set of search commands over and over, save the search commands for yourself and other users to run. You can either set up and save the searches you use most or use a search that someone else has created and stored.

To create a stored search, click **Stored Searches** and click **New**. Give the search a descriptive name and then type the search command or commands needed to get the results you want. For example, if you wanted to store a search for the current day's birthdays, you would use the command `*birthday=today`. Once you store the search, run it daily without having to type in the command. Begin by clicking **Stored Searches**. Then, next to the search name, click **Run Search**. The Group Functions page will open and show the number of students in your current selection at the top of the page.

## Creating Stored Selections

Use stored selections to retrieve student or staff records that you search for routinely. The list of students or staff members in the group is saved at the time that you create the stored selection. A stored selection is a snapshot of a group at one point in time and does not change when information changes.

Each user manages his or her stored selections. However, you can publish a stored selection for other staff members to use. You may need to delete and recreate your stored selections periodically to update the data.

To create a stored selection, follow these steps:

1. On the Start Page, click **All**
2. Click **Select By Hand**
3. Clear the Student column header check box

# Searching for Students

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4. Select the students
5. Click **Update Selection**
6. Click the Select Function arrow
7. Under the Search section of the Group Functions menu, choose **Save Stored Selection**
8. Name the selection
9. Use the default **SAVE the current selection with a new name**
10. Click **Submit**

The page will be refreshed and the new group will appear below the options. To access and work with this group of students in the future, navigate to the Stored Selections page and click **Go Functions**. Unless you publish the group, you are the only user who can access the stored selection.

## Search Using the Enrollment Summary

The Enrollment Summary page displays a table that breaks down student enrollment by grade level, gender, and ethnicity. Access the Enrollment Summary page from the main menu to view the enrollment summary for the entire school or district. Or, first search for a group of students and then view the enrollment summary from the Group Functions menu for that group of students.

Click column or row headings to view ethnicity information in charts. Click the bright blue number to view a list of males in the group. Click the pink number to view a list of females in the group. Click the dark blue number to view a list of males and females in the group.

## Search Using the Master Schedule or Teacher Schedules

To view the master schedule for the currently selected term, click **Master Schedule** in the main menu. The master schedule contains enrollment numbers for each section. Sort how you view master schedule information using the Master Schedule Preferences page. When viewing the master schedule in a matrix view, select the enrollment number for a section to view the class roster. You can add students from the class roster to the current selection, make them the current selection, enroll students in a different class, or drop them from the class.

To view individual teacher schedules and class rosters, click **Teacher Schedules** in the main menu and select a teacher. View the teacher's class roster by clicking the number under Enrollment. Then choose what to do with the student list.

## Special Functions Searches

Use searches on the Special Functions page to find students with grades or attendance problems. On the Start Page, from the main menu, click **Special Functions**.

Special Function	Description
Search Attachments	Search for documents attached to student records
Search By GPA	Search for students by cumulative, term, or current grade point averages



# Searching for Students

Special Function	Description
Search By Grades/Attendance	Search for students with certain current grades, historical grades, or attendance codes for a specified time frame
Search For Perfect Attendance	Find students with perfect attendance as defined by the policy of the school or district
Search Log Entries	Find students with certain log entries; select criteria to perform general or narrowed searches by fields such as log type, subtype, consequence, date, or author
Special Program Enrollment	View and select students enrolled in special programs

## Search Using the Staff Directory

To find contact information for several staff members at once, view the staff directory from the Staff Search page. On the Start Page, click the Staff tab and then click **Staff Directory**. In the staff directory, view all staff members or groups of staff members, such as teachers, office staff, lunch staff, or substitutes. The staff type you assign to a staff member on the New Staff Member page, the Information page, or the Staff Security page determines which directory list the staff member is associated with.

To copy email addresses for a group of staff members, first click the desired group from the set of Listing options. Then go to the bottom of the page and copy the email addresses in the Group Email field.

## Search Contacts Associated with Students

In addition to viewing people associated with students on the Contacts tab, you can see which people are directly tied to an individual student. On the Start Page, from the Students tab, select a student and then from the Information section of the student pages menu, click **Contacts**. On the Contacts page is a list of all people currently associated with the student, such as parents or guardians and emergency contacts. Sort the order of the listed contacts using the up and down arrows next to the contact name. Sort contacts based on their priority. The first person on the list is considered the primary contact.

To associate another person with a student, click **Add**. At the bottom of the Add Contacts screen, click **New Contact**. Contacts can be associated with students for a limited time frame using the Start Date and End Date fields in the Student Details area on the Contact Details page. To also view individuals that have past or future associations with the student, check **Show All**.

## Running the Class Roster Report

Use the Class Rosters (PDF) report to create a PDF file that displays specified information for students who are in selected teachers' classes. Printing a copy of the class roster is an excellent way to create class rosters for all teachers in the school in case of an emergency or end of term grade verification sheet.

To print the Class Roster report, follow these steps:

1. On the Start Page, click **System Reports**

# Searching for Students

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2. In the Student Listings section, click **Class Rosters (PDF)**
3. Select the teacher(s) to print rosters for

You must select at least one teacher or the report will not run.
4. If desired, select specific periods and days in the Meetings section
5. Select which students to include
6. Choose how the text in the header will appear on the report
7. Select when and where to print the heading
8. Set up the heading text:
  - o Enter text
  - o Enter PowerSchool SIS fields to pull information from the Sections table
  - o Enter data access tags as needed

For example:

Teacher: ^(teachername)

Course name: ^(coursename)

Section: ^(Section\_Number)

Period & Day: ^(Expression)

Number of students enrolled: ^(No\_of\_students)

9. Choose how the roster columns will appear on the report
10. Set up the roster columns using the format: field name\column title\column width\alignment

Roster columns use data from the Students table.

Example roster columns:

LastFirst\Student Name\1.5\L

Gender\Gender\.5\C

^(att;tar)\Tardies\.5\C

11. Set the roster page dimensions and settings
12. If using a watermark, select the text and mode
13. Define when to print the report
14. Click **Submit**
15. On the Report Queue page, click **Refresh** if the report is still running
16. When the report's status is listed as Completed, click **View** to see the report

## Student School Enrollments

Use PowerSchool SIS to record student information and track academic progress. Create a new enrollment record for all students new to your district. New students also require a class schedule, and existing students may require schedule changes. For all students, you are required to enter and update personal information, such as their demographics, contacts, scheduling setup, and historical grades.

When a student leaves your school, you must transfer the student out of your school. The student will be inactive, but his or her record is retained in the system and associated with your school, in case he re-enrolls in the school.

## Enrolling Students

During the school year, you'll enroll students who are new to your school or re-enroll students who return to your school. When you enroll or re-enroll a student during the school year, PowerSchool SIS activates that student's record. After you enroll a student, enter information on his or her student pages.

To enroll a student for next school year, use the first day of the next school year for the enrollment date. The student is inactive and has an enroll status of -1 until the first day of school.

Enter the following information on the Scheduling Setup page for preregistered students if the End of Year process has not been run:

- Next Year Grade: This should be the same grade level as you used to enroll the student and the student's grade level during the upcoming school year
- Next School Indicator: This should be the school they will be in next year

## Enrolling New Students

Before you enroll a new student in your school, ensure that the student does not already have a record within your district by searching for the student at the District Office using a forward slash in front of his or her name. If the student is truly brand new to your district, create a new record. All required fields on the Enroll New Student page have an asterisk next to them. Based on your regional regulatory compliance reporting requirements, create a list of required fields for your district.

Follow these steps at the student's home school to enroll a new student:

1. On the Start Page, click **Enroll New Student**

The page is divided into four areas: Student Information, State Information, Information for Family Match, and Home Address.

2. Enter the student's last name, first name, and middle initial or name
3. Enter the student's date of birth
4. Select the student's gender
5. Enter a student number or leave the field blank if you want to assign a system-generated number
6. Enter the student's social security number if desired

# Student School Enrollments

7. Enter the primary phone number for the student in the Phone Number field
8. Enter the date the student will begin school

Notice that the Enrollment date field defaults to the current date. If you enter a future date, the student's record will be activated on that future date automatically. Never enter a date prior to the first day of the school year or prior to the first day the student will attend classes.

9. Choose the student's full-time equivalency
10. Select the student's current grade level

If you are preregistering a student, select the grade level the student will be in next school year.

11. Choose the appropriate entry code
12. Choose the district where the student resides
13. Choose the student's fee exemption status

Student Information	
Student's Name (Last, First Middle)	Maxim * Joseph Mitchell
DOB	2/21/2003
Gender	Male (M)
Student number	(If this field is left blank, the system will assign the Student Number)
Social Security Number	
Phone Number	555-555-1458
Enrollment date	7/29/2019 *
Full-Time Equivalency	Full Time * These choices are Term Year specific. Please confirm that the current Term context is correct.
Grade Level	10
Entry Code	A1 (New Applicant)
Track	
District of Residence	Apple Grove Unified School District (0100)
Fee Exemption Status	Student Not Exempted
School	Apple Grove High School

14. Complete any state-specific fields
15. Select **Search For Family Members to Link to and Copy Information from**
16. Enter specific information to filter and find family matches
17. Select to include the student's last name in the search
18. If you are not adding the information using the family search option, enter the student's home address
19. Click **Validate** to verify that the student's address is valid and within district boundaries
20. Click **Submit**

# Student School Enrollments

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Clicking Submit processes the enrollment, searches for potential family members, and verifies that the student does not already exist in the system. Four fields are used to find student matches: last name, phone number, date of birth, and social security number.

If a possible match for the new student is found, the "Check for Duplicate Students" page appears. If the student has ever been enrolled in your database (for example, a student was enrolled in 1st grade, then transferred out of the district after 2nd grade, then returned to the district in 7th grade), the student would have an inactive record in PowerSchool SIS. Click the student's name and use the "Re-Enroll in School" function to reactivate the record.

If the student is not among the potential duplicate students, click **Enroll** to continue.

If you searched for family members, those possible students will appear after you click Enroll. Select whom the student is related to and select a student you want to copy demographic information from. Then, click **Submit**. The student is enrolled, and the student pages appear so you can enter additional information, such as the student's emergency contact information.

Complete the setup of other student information according to your district's requirements, such as information on the Demographics, Contacts, and Scheduling Setup pages.

## Re-enrolling a Student

Re-enroll any student who was enrolled in your district before he or she transferred out of school. Keep in mind that if a student was previously enrolled at another school, a staff member with access to that school must first transfer the student to your school using **Functions > Transfer** to Another School before you can enroll the student at your school.

When you re-enroll the student, you reactivate all of the related student information entered previously. After you complete the re-enrollment, update the student's information on his or her student pages.

1. In the search field, enter a slash (/) and the student's last name, and press **Enter**

If only one student matches your search, the student pages for that student appear. If more than one student matches your search, a list of student names appears in the Current Student Selection area.

2. Click the student's name
3. Click **Functions > Re-Enroll In School**
4. For the date of re-enrollment, enter the date the student will begin taking classes

Notice that this field defaults to the current date. If you enter a future date, the student's record will be activated on that future date automatically. Never enter a date prior to the first day of the school year or prior to the first day the student will attend classes.

5. Choose an entry code, the student's full-time equivalency, current grade level, track (if applicable), and district of residence
6. Enter any comments about the enrollment (optional)
7. From the "Restore class enrollments?" menu, choose one of the following options:

# Student School Enrollments

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- A. Choose **Yes** if the student is re-enrolling at your school during the same schedule term in which he or she transferred out of your school, and you want to restore the student's class schedule
- B. Choose **No** if the student is re-enrolling at your school after the schedule term in which he or she transferred out, and you want to create a new schedule

## 8. Click **Submit**

The student is re-enrolled in your school. His or her records in PowerSchool SIS are active again on the student's first day of school, and you can update and edit information on the student pages.

## Entering Student Information

Once you enroll a new student, add additional information about the student on several PowerSchool SIS pages. The information you add depends on what your district policies dictate.

In addition to adding the student's address and phone information, if not previously entered when the student was enrolled, use the General Demographics page to add federal ethnicity and race information, as well as additional state information. Select **Demographics** from the student pages menu.

Another important student page to add to your enrollment process is the Scheduling Setup page. From the Scheduling section of the student pages menu, click **Scheduling Setup**. On this page, add the student's next year grade, year of graduation, and the next school indicator. Completing this information will help make the End of Year process smoother.

## Student Contacts

When you enroll a new student in your district or school, you typically enter contact information for the student's parents or guardians. However, during the enrollment process or at other times during the school year, you may also need to enter contact information for emergency contacts, daycare providers, or additional family members. Add detailed contact information that describes the relationships between the contacts and the students.

## Contacts Search

On the Start Page, select the Contacts tab to search through all parents, guardians, and other contacts associated with your students. You can also select **Contact Search** from the main menu to search for a contact without using the Contacts tab.

Start by clicking the Contacts tab on the Start Page. Perform a search to see if the contact is already in the system. Be aware that below the Email Address field, you may want to clear the check box for "Only Show Access Accounts." If this check box is selected, and it may be selected by default, the system limits the search to only contacts who have web access accounts to access a student's information through the PowerSchool SIS Parent Portal. Clear this check box to search all contacts in the system.

Enter information in one of the search fields and click **Search**. Then review the list of results below the search area and click the name of a contact to access the Contact Details page for that contact.

# Student School Enrollments

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In some situations, you may need to edit contact status or contact web account status for a group of contacts at once, such as all contacts associated with 12th-grade students. To search for the contacts associated with a group of students and modify their statuses, follow these steps:

1. Search for and select a group of students
2. Click the Contacts tab
3. Check **Filter By Current Student Selection**
4. Click **Search** to generate a list of the related contacts
5. Below the search results, click **Select By Hand**

You can select all or some of the contacts related to those students.

6. To select all the contacts returned, check the box next to Contact in the blue bar
7. Open the Group Functions menu in the lower right
8. Click **Edit Contacts**
9. Open the Choose Column menu
10. Select **Contact Status**
11. Open the "Value to Set" menu
12. Select **Inactive**
13. Verify that the values that appear in the Current Value and Pending Values columns are accurate
14. To change the status for all the contacts at once, click **Submit**

## Contact Details

The Contact Details page contains some information that also existed on several student pages. The sections on this page are labeled Demographics, Web Account Access, (related) Students, Phone Numbers, Email Addresses, and Addresses. You can collapse or expand each section as needed.

Add robust details about each contact and how they are related to the student. For example, define the contact's relationship to a student. Choose from relationship options such as: aunt, brother, father, friend, grandfather, grandmother, mother, neighbor, other, sister, and uncle. Also define which contacts have custody of and/or live with the associated student. Define which contacts can pick the student up from school, which ones are emergency contacts, and which ones receive mail from the school.

In the Students section, find columns for School, Name, Relationship, Custody, Lives With, School Pickup, Emergency Contact, Original Content Type, Start Date, End Date, and Data Access. Click the Edit icon within a row to make the desired selections. Click the – sign to delete a contact.

When you finish, click **Submit**.

To add other students who are related to this contact, click **Add Students**. Run a search, select a student, and click **Submit**.

# Student School Enrollments

On the Contact Details page, you can also add or change phone numbers, email addresses, and mailing addresses. As soon as you enter the new information and click **Submit**, the information is saved.

Keep in mind that when you make a change on the Contact Details page, the data will be synced automatically with the related PowerSchool SIS pages.

## Web Account Access

Using the student contacts feature, you'll be able to manage web account access right from the Contact Details page. You can lock or disable parent or guardian accounts, define or reset usernames and passwords, and enter account email addresses. Using the access keys found on the Access Accounts student page, parents and guardians can create their own parent accounts in the PowerSchool SIS Parent Portal, but you use the Contact Details page to create and manage individual accounts.

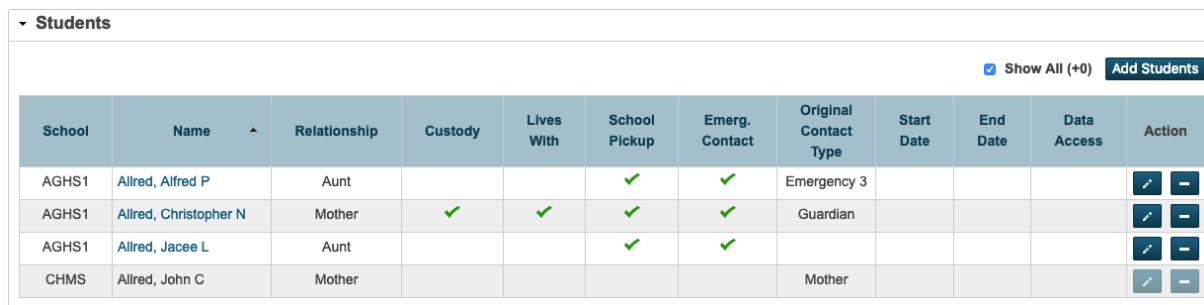
## New Contact Entry









Use the New Contact Entry link to access the Create Contact page, where you can create a web access account for the contact and enter additional details, including demographics, student relationship details, phone numbers, email addresses, and addresses all on one page.

Enter new contact information in two ways. Start with a student and click **Contacts** in the student pages menu, then click **Add**. If you choose to not start with a student, click **New Contact Entry** from the main menu on the Start Page, and add the contact information on the Create Contact page.

Once the contact record has been created, associate the new contact with a student or students. Click **Add Students** in the Students section on the Contact Details page to associate a student with that contact. Add the contact information once and it will be synced throughout the system.

At a glance, you will find a lot of important information on the Contact Details page. You have the list of students associated with this contact and the relationship that each has with the contact.



School	Name	Relationship	Custody	Lives With	School Pickup	Emerg. Contact	Original Contact Type	Start Date	End Date	Data Access	Action
AGHS1	Allred, Alfred P	Aunt			✓	✓	Emergency 3				 
AGHS1	Allred, Christopher N	Mother	✓	✓	✓	✓	Guardian				 
AGHS1	Allred, Jacee L	Aunt			✓	✓					 
CHMS	Allred, John C	Mother					Mother				 

Notice the column for the original contact type. The original contact types are the fields from the original contact system, and they are: Mother, Father, Guardian, and three Emergency Contacts. The original contact type fields are the only ones for which data will be synced between the original contact database tables and the new contact database tables. Data you enter for contacts who are not designated as original contact types will be stored in only the new contact database tables.



# Student School Enrollments

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On the Contact Details page, click the Edit icon on any line and a drawer slides out. Make the appropriate selections. Then at the bottom of the pane, open the menu for Original Contact Type and make a selection as appropriate. Be aware that you can choose only one contact to be mother and only one to be father when designating original contact types.

Once you select an original contact type for that contact, the information appears next to the associated student on the Contacts page in the column labeled Original Contact Type.

There are two other tabs on this drawer. Click the All tab to set a time limit for when this contact will be active. If you set up the web account access for the contact with a username and password, click the Data Access tab to give the contact access to this student data.

Also, on the Contact Details page, notice the arrows in the Order column in the Phone Numbers area. As a best practice, the primary contact information should be first on the list. Who should the school administrator call first? Use the up and down arrows to reorder the phone numbers as needed. When you finish making changes, click **Submit**.

Follow these steps to add a new emergency contact to the system:

1. From the Start Page, search for and select a student; choose one whose last name starts with the same letter as your last name
2. Click **Contacts** from the student pages menu
3. Click **Add**
4. Click **New Contact**
5. On the Create Contact page, first enter the contact's name and select the gender
6. Since this will be a new active contact record, verify that **Active** is checked
7. This contact will not access the student's information through the PowerSchool SIS Parent Portal, so do not complete the fields in the Web Account Access section
8. Click **Submit** to save the contact record
9. In the Students section, click the Edit icon next to the student's name
10. Open the Relationship menu and make this person a neighbor

If you want to put a time limit on this entry, you can. For example, this neighbor is moving on a certain date and will no longer be an emergency contact. Open the Start Date and End Date menus and choose a date range for this entry.

11. Select **Emergency Contact** from the list of options
12. Open the Original Contact Type menu and select **Emergency 1, 2, or 3**
13. Click **Submit**
14. Search for the student again to make sure the new contact was added

Keep in mind that when you need to add a contact who needs access to student information, first click **Add Account** in the Web Account Access area to add the username and password for the contact. Then click the Edit icon on the Contact Details page next to the student's name, in the Students area. In the drawer that slides out from the right, click the Data Access tab and check **Can Access Student Data and Email**. Click **Submit** to save your changes.

## Contacts Student Page

When you enter contacts in PowerSchool SIS, first associate them with students. Then, use the Contacts student page to manage all of the contacts associated with a student. Also use the Contacts student page to view contact information at-a-glance for multiple contacts. For example, if a student has an emergency, you can find all of the pertinent contact information all on one page in an easy-to-read table. Additionally, navigate to the Contact Details pages for contacts associated with a student to edit contact information from this page.

Choose a student and click **Contacts** from the student pages menu. In the Contacts section, review which contacts are related to this student and what the relationships are. Notice that you can change the order and put the primary contacts at the top.

## Consolidate Contacts

When you update to PowerSchool SIS 12+, existing contact information is migrated automatically to the new contacts database tables. But what if you find that once the data is brought over, you have duplicate contact records? You can consolidate contact information to clean up existing entries.

For example, if two siblings are enrolled in the district, contact information may have been entered for the students' mother at both the high school and at the elementary school, so two records exist for the same parent. When you consolidate the records, you are creating one new contact record that will be used at both schools.

Be very cautious about consolidating records. It is possible to consolidate records at the school level, but the changes will be district-wide, so it is something that must be done very carefully. When in doubt, do not consolidate records.

You have two choices when consolidating contacts, you can either consolidate all the data, which means that all the information from the three records will be listed within the master record; or you can keep the master record and delete the other two records. Keep in mind that if you consolidate all the data into the master record, you may have to clean up that record to remove any duplicate or outdated information.

Follow these steps to consolidate contact records:

1. On the Start Page, click the Contacts tab
2. Enter criteria to search for a contact, such as the parent's first and last name

Be sure to clear the check box for Only Show Access Accounts.

3. Click **Search**
4. Review the records returned and determine which record will be used as the master contact record

Ensure that each instance of the contact is indeed the same person, not two or more people with the same name.

5. In the breadcrumbs, click **Contacts** to return to the Contacts tab
6. Search for the contact again
7. Click **Select By Hand** and select the duplicate records for the person you wish to consolidate

# Student School Enrollments

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8. Use the Select Function arrow to open the Group Functions menu and click **Consolidate Contacts**

When you select a large number of contacts, an alert appears indicating you are about to consolidate a large number of records. Click **Confirm** to continue.

9. In the Master column, select which record will be the master record

By default, the first record will be selected as the master.

10. Select a consolidation option, such as **Keep Master Only**

11. Click **Review**

12. Review the information on the Consolidated Contact page

13. Click **Submit Consolidation**

14. Review the confirmation message and click **OK**

## Student Contact Data

Using PowerSchool SIS version 12.1.1, administrators can easily export student contact data out of the SIS using Data Export Manager, work with the data in a spreadsheet, and then import the data back into the SIS using Data Import Manager. Using these tools, customers can both clean up existing student contact data and migrate the data out of their custom contact fields into student contacts.

Additional student contact fields have also been added to the PowerSchool SIS database for use by Compliance, PowerSchool Services, and users. The fields may be added to the student contact pages as needed using page customizations.

## Data Manager

Export and import contact information into and out of the PowerSchool SIS using Data Manager. Use the export and import process to clean up contact information in mass and import new contact information from user-created database extensions.

## Exporting Student Contacts Data

When exporting contacts, keep these points in mind:

- At least one row will be exported for every contact in the export
- Multiple rows will be created if a contact has multiple instances of any mapped column value

For example, when the email address column is selected for export and the contact has two email address records, then two rows will be rendered.

- The number of rows rendered for a contact will be equal to the greatest number of repeated column values that were selected for export

For example, if a contact has 2 emails, 3 phones, 1 address, and 4 students (each with a single detail record) then 4 rows will be rendered.

- If multiple rows are rendered, the contact ID, DCID, and name fields will be rendered on each row, but the remaining Person columns will be rendered only on the first row

# Student School Enrollments

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- Extended table and child table columns can be selected for export
- Extended table values are rendered on a single row
- Child table values will appear on a separate row for each child record
- When multiple child records are exported for a single parent record, all of the parent record's mapped fields are repeated on each row along with the child data

Under the Setup section of the main menu, start the export by clicking **System**. Choose **Page and Data Management**, find the Data Export section, and select **Data Export Manager**. Open the Category menu and select **PowerSchool Data Sets**. Then open the Export From menu and select **Contacts** or **Student: Legacy Contacts**. Choose Contacts to export existing student contact records. Use Student: Legacy Contacts to export contacts in custom fields.

Choose the fields you wish to export from the various tables by checking the check box next to the table or field name. Then click **Next** to continue with the export process.

After selecting which Contacts fields to export, in the Select/Edit Records from Contacts section, use the Built In Filters options to narrow the list of results. Select from:

- Students to include – Select the check box to limit the export to contacts who are associated with the selected students
- Contact Status – Indicate which types of contacts you want to export:
  - All – Both active and inactive contacts
  - Active – Only active contacts
  - Inactive – Only inactive contacts
- Access Account – Indicate which access account types you want to export:
  - All – All access account types
  - No Access Account – Only contacts that do not have an access account
  - Has Access Account – Only contacts that do have an access account
  - Has Active Access Account – Only contacts that do have an enabled access account
  - Has Inactive Access Account – Only contacts that do have an access account, but the account has yet to be enabled

Click **Next** again. Then name the export file and select your format options. Now choose to do one of two things:

- Click **Save Template** to save these selections as a template to be used again
- Click **Export** to create an export file

## Importing Student Contacts Data

Import contact information using Data Import Manager. Import a contact along with associated addresses, phone numbers, email addresses, and students. Using the Contacts module, you can also import information into Person, Address, Email, Phone Number, and Students extension tables. In order to associate more than one of any child record, multiple related rows are included in the import file.

There are some important things to know when importing contacts:

# Student School Enrollments

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- Some fields have rules regarding what is a valid value, such as dates, Boolean flags, and code sets
- An invalid value may cause a single row or multi-row import to fail
- Multi-row imports have additional checks for duplicates and conflicting values
- Duplicates are ignored during the import, while conflicts are rejected with appropriate error messages
- When processing multiple related rows, the import process rejects all related rows if any of the rows have an error
- The Import Results page displays applicable error messages for each failed row

Once you have created the import file, start the import by clicking **System**. Choose **Page and Data Management**, find the Data Import section, and select **Data Import Manager**.

To import the data, make selections in three sections: "Select Source and Target," "Map Columns," and "Select Options."

In the "Select Source and Target" section, choose the source file on your computer. The import operation is similar to the export operation, but you have access to different tables and data sets from the Import Into menu. Select **Contacts** from the Import Into menu, then click **Next**.

In the Map Columns section, use the PowerSchool Field menus to select the fields that match the Import File Columns. To save the import as a template, click **Save Template** and proceed as you would when creating an export template with the Data Manager, otherwise, click **Next**.

Verify **Check to exclude the first row** is selected so that you don't import the column headings from the import file. Then click **Import**. If you don't see any results listed under Imported, refresh the import results by clicking **Refresh**. In the Imported section, verify that the records you were trying to import are listed. The first record will be skipped because it contains the column headers.

## Transferring Students Out of School

When students leave your school to attend another school in or out of your district, use the Transfer Out Of School function. You can transfer students out of your school individually or as a group. When you transfer a student out of your school, you deactivate the student's record and remove his or her classes automatically. Student records are not deleted; their status changes to inactive. Keep in mind that inactive students do not appear in lists and searches (unless you use the forward slash (/) to search for inactive students). The student remains associated with your school in the database until he or she is transferred to another school within your district.

To transfer a student out of your school:

1. On the Start Page, search for and select the student
2. In the Enrollment section of the student pages menu, click **Functions**
3. Click **Transfer Out Of School**
4. Enter any comments about the transfer

# Student School Enrollments

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5. Enter the date of transfer

For accurate attendance data, enter the date after the last day the student actually attends classes at your school.

6. Choose the appropriate exit code
7. Click **Submit**
8. Click **Confirm Submit**

You can also transfer out a group of students. For example, if a family is relocating to another area and has four students currently enrolled in your school, you can search for, select, and transfer them all out of your school at the same time.

Transfer out a group of students:

1. On the Start Page, click **All**
2. Below your current selection, click **Select By Hand**
3. Clear the Student column header check box
4. Select the students you want in your group and click **Update Selection**
5. Click the Select Function arrow, and choose **Transfer Out Of School**
6. Enter any comments concerning the transfer
7. Enter the date of transfer
8. Choose the appropriate exit code
9. Select the verification check box to confirm that you want to transfer out the selected group of students
10. Click **Submit**

## Transferring a Student to Another School in Your District

An inactive student in your system wants to enroll in another school in your district, and the administrator at that school asked that you transfer the student's records. Transfer the student's record from your school to the other school electronically. Keep in mind that you can transfer inactive students to only other schools on the same PowerSchool SIS server as your school.

1. Using the forward slash (/), search for and select the student
2. In the Enrollment section of the student pages menu, click **Functions**
3. Click **Transfer To Another School**
4. Choose the school the student is transferring to
5. Click **Submit**

Now, the inactive student record is transferred to the new school. The new school can activate the student using the "Re-Enroll In School" function.

## Family Management

Many families will have more than one child enrolled in your district. Use the Family Match and Family Rep features to associate family members with each other.

## Family Match

On the Enroll New Student page, use the optional family match and address validation features to keep enrollment data consistent and accurate. The Family Management function in PowerSchool SIS streamlines the entry of the names, grade levels, and schools of students who are related to the selected student. Use Family Management to identify siblings or other students in the district who share the same demographic and parent information. When you search for family members of the new enrollee, you can relate the student to and copy information from family members already in the database. Then, any time you make a change to the record of one of the students in the family, the system will copy the demographic information to the linked records automatically.

Use the Address Management function to validate an address and verify that the student's address lies within the district or school boundaries. The PowerSchool SIS administrator sets up the district and school boundaries. If the address is valid, you will see a Google Map after you click **Validate**. The map is interactive, so zoom in or click and drag to move the map.

Begin by choosing the district or school from the View Boundary menu; the boundary lines appear on the map. If the student is inside the boundaries, the menu will show, "In." If the address is outside the boundaries, it will show "Out." Click **Accept** to apply the geocode to the student's address or click **Cancel** to close the window. If you see alternative addresses listed, PowerSchool SIS will show the actual address recorded at the post office, which you can use to update the address.

If the address is not valid, you will see a message stating, "No address found." Click **OK** to close the window. An invalid address will not stop you from submitting your enrollment. After performing the validation, click **Submit**.

## Enroll Another Student in the Same Household

Enroll a student who has family members who are already enrolled in the district by searching for the enrolled family members.

1. On the Start Page, click **Enroll New Student**
2. Enter the student's last name, first name, and middle initial
3. In the Enrollment date field, enter the date the student will start school

The enrollment date defaults to the current date, but it is rarely the first day the student will attend classes. Never enter a date prior to the first day of the school year.

4. Select a full-time equivalency
5. Complete all fields required by the school
6. Select **Search For Family Members to Link to and Copy Information from**
7. Click **Submit**

# Student School Enrollments

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8. If the student is not on the "Check for Duplicate Students" page, click **Enroll**

If the student is on the duplicate list, click the student's name and use the "Re-Enroll in School" function to reactivate the record.

9. Select **Copy** and **Related** when you find the matching sibling
10. Click **Submit**

PowerSchool SIS copies the designated demographic information from the sibling's record to the new student's record. Complete additional student information, such as the fields on the Schedule Setup page.

Here is another way to enroll more than one new student in a family when you have one student enrolled already:

1. Navigate to the enrolled sibling's student pages
2. Under Enrollment, click **Functions**
3. Click **Enroll New Student Living in the Same Household**
4. Complete all fields required by the school and click **Submit > Enroll**

The street address and phone number will be copied to the new student's record.

## Family Reps

If more than one student from the same family attends the same school, one of the siblings can be designated as the family representative, or "family rep." That way, when school correspondence is mailed home, parents and guardians will receive only one copy of the letter, rather than one for each student.

Keep in mind that if a school decides to use family representatives, one student from each family must be designated as the rep, even if the student has no siblings at the school.

Before the first day of school, make sure students have the correct family rep designation. Designating the youngest sibling as the family rep is recommended because that student will remain in the system the longest.

To designate or remove an individual student as a family rep, check or uncheck the "Family rep" box for on his or her Modify Info page. Use the Student Field Value group function to change family\_rep field values for a group of students.

To add the family rep designation for a group of students:

1. From the Start Page, select the group of students
2. Click the Select Function arrow
3. Choose the Student Field Value group function
4. Enter **family\_rep** as the field to change
5. Enter **1** as the new field value

Entering a 1 for the field value checks the check box on the Modify Info page.

6. Click **Submit**
7. Verify that the information on the Field Value page is correct and click **Submit**



## Student Class Enrollments

Once a student is enrolled in school, PowerSchool SIS has several options to schedule a student into classes. Options for mass enrolling and mass dropping students are also available.

### Adding Courses

There are several ways to add a course to a student's schedule. The method you use depends on the amount of information you know about the course, as well as your school's registration procedures.

### Searching Available Classes

If a student drops a course and wants to schedule another course in the same period, make your selection from a list of courses available during that particular period.

1. On the Start Page, search for and select the student
2. In the Scheduling section of the student pages menu, click **Modify Schedule**
3. In the Search Available Classes section, choose the period you need to enroll the student in

If a student wants to review several replacement course options with you, enter the course number and choose **All** rather than a specific period.

4. Click **Find**
5. Refine your search by choosing a period, day, term, grade, teacher, and credit type
6. Update the Effective Enrollment Date field to the date the student will first attend class
7. Click the course name to enroll the student

### Entering Course Numbers

If you know the number of the course the student wants to enroll in, enroll him or her using the Quick Enroll section on the Modify Schedule page. If you don't know the exact course number, use the wildcard (@) to replace unknown course number information. For example, if all English courses begin with 20, enter 20@ to show a list of all English courses and sections.

1. On the Start Page, search for and select the student
2. In the Scheduling section of the student pages menu, click **Modify Schedule**
3. In the Quick Enroll area, enter the course number
4. Click **Enroll**

If there are several sections of that course available, the Available Courses page appears.

5. Update the Effective Enrollment Date field to the date the student will first attend class

# Student Class Enrollments

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6. Click the course name to enroll the student

If you know the course and section number, first verify the enrollment date and then enter this information in the Course.Section field (format: course.section), and click **Enroll**. You will enroll the student in the specified course and section automatically; likewise, the student is automatically enrolled when only one section of a course exists.

## Dropping Courses

You have several ways to drop courses from a student's schedule. The number of courses the student wants to drop determines the method you use.

### Dropping All Courses

If you want to drop all of the student's courses at once, perform the following steps:

1. On the Start Page, search for and select the student
2. In the Scheduling section of the student pages menu, click **Modify Schedule**
3. In the Enrollment section of the Modify Schedule page, click **Drop All**
4. In the Exit Date field, enter the date of the day after the student will finish the courses

You must enter the day after the student's last day attending the class to ensure that attendance data is accurate.

5. Click **Drop Classes**

### Dropping One Course

If you want to drop one of the student's courses, perform the following steps:

1. On the Start Page, search for and select the student
2. In the Scheduling section of the student pages menu, click **Modify Schedule**
3. In the Enrollment section of the student's Modify Schedule page, on the right side, check **Drop** next to the course you want to drop
4. Click **Drop Selected**
5. In the Exit Date field, enter the date that corresponds to the day after the student will finish the course

You must enter the day after the student's last day attending the class to ensure that attendance data is accurate.

6. Click **Drop Classes**

To drop a student from a class the student never attended, use the same date the student was enrolled in the class as the exit date. This will remove the class from the student's enrollments. Do not use a date that proceeds the entry date.

## Use Automated Scheduling

Automated scheduling is course specific (not section specific as with filtering) and most often used in secondary schools. While you'll have to perform a few more steps than you do when filtering only, you'll receive a completed schedule after just one click rather than having to add one class at a time. Enter a student's requests for specific courses, and the system will schedule the student in the sections that best fit his or her schedule automatically. However, you must have completed the scheduling setup and have the PowerScheduler engine, which is a set of files required for running the automated scheduling function, installed and running on your server to use the Automated Schedule function.

Edit or enter course requests for the student on the Modify Schedule – Requests page. The scheduling engine uses requests to build the student's schedule. The engine will not schedule the student into a course that he or she did not request. Locked enrollments are the exception to the automated process; locked enrollments are kept, even if a request does not exist for the course.

## Manually Schedule Students

To schedule a student manually, pick specific sections in which to enroll the student, and choose whether or not to override the system-defined schedule, if one exists. The Manually Schedule Student page displays requests and current enrollments and shows when other sections of requested courses are offered. View the Manually Schedule Student page to verify enrollments and course requests for new and currently enrolled students. The page displays no enrollment information until you enter a request or a schedule.

The student's current classes appear as gray-checked blocks, available classes are green, and full classes are red with an asterisk.

To enroll a student into a full class, enter the password to override the maximum enrollment. The PowerSchool SIS administrator sets up the password at the district level.

## Mass Enroll Students in a Class

To mass enroll students in a class, you must first select the group of students you want to enroll. Then use the Mass Enroll group function to enroll students in the same class.

At the beginning of the year, if you have dependent sections set up, mass enroll students in a teacher's AM Attendance or Homeroom section to enroll them in all dependent sections automatically.

1. Search for a group of students

If the group of students is enrolled in the same class already, use the Teacher Schedules page to find the group and mass enroll the students in a different class.

2. Click the Select Functions arrow
3. In the Scheduling section, click **Mass Enroll**

# Student Class Enrollments

4. In the Quick Enroll section, enter the course number and section number of the class

Keep in mind that the field is case sensitive. If you don't know the course number and section number, use the Filter By fields to search for the correct section.

The screenshot shows two sections of a web interface. The top section is titled "Quick Enroll" and contains a text input field labeled "Course.Section" with the value "MAT3000.". To the right of this field is a blue button with the text "Enroll" and a right-pointing arrow. The bottom section is titled "Filter By" and contains several dropdown menus: "Period" (All), "Term" (All), "Teacher" (All), "Day" (All), "Grade" (All), "Credit Type" (All), and "Course" (empty). Below these filters is a checkbox labeled "Show only classes with available seats" which is currently turned "Off". To the right of the checkbox is a black "Search" button.

5. Click **Enroll**
6. Verify the section
7. Edit the enrollment date, as needed

The screenshot shows a page with an "Entry Date: 02/25/2019" and an "Edit Date" button. Below this is a "Section Summary" section containing a table with the following data:

Course Name	Course Number	Section	Term	Fees	Pending Enrollment Count	Class Status
AP Calculus	MAT3000	2	Semester 2	No	11/25	Section found

8. Click **Enroll Students**

## Mass Drop Students from a Class

You have the option to drop multiple students from a class at once. For example, new student enrollments can affect the number of sections you need to offer for required courses. If you didn't plan for those new students, you may need to create a new section. To balance out the sections, drop some students from one section, then enroll them into the new section. Perform all of these functions by navigating to the Teacher Schedules page, selecting a teacher, and clicking an enrollment number.

Follow these steps to drop a group of students from a teacher's class.

1. On the Start Page, click **Teacher Schedules**
2. Click the teacher's name
3. Click the section enrollment number
4. In the Results area, clear the **Select All** check box
5. Select the names of the students you wish to drop
6. Click **Drop from this Class**

## Student Class Enrollments

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7. Verify the exit date

Remember that the exit date must be the day after the last day the students attend class.

8. Check **Clear Attendance on and after Exit Date**
9. Click **Drop Students**

This group will be your current selection, and you can enroll them into another class if desired.

## Student Attendance

Manage student attendance on a daily basis in PowerSchool SIS. Search for students who have been marked absent today (or for any specified date), update student attendance when appropriate, and access attendance reports. Because you manage and view information in real time, you can access a list of the students in your school who have been marked absent by teachers as soon as they take attendance in PowerTeacher or Unified Classroom. Even view a list of teachers who have not taken attendance. Likewise, when you change a student's attendance in the office, the teachers see the change you made the next time they open the attendance page. Once an attendance code is entered by an office staff member, teachers cannot edit the code. If a change is required, it must be made by office staff.

Use the attendance process outlined in this section to manage student attendance. You may need to adapt parts of this process in accordance with your school and district attendance policies. Access the reports for either period attendance or daily attendance, depending on which tracking method your school uses. See your PowerSchool SIS administrator if you are not sure what method of attendance tracking has been set up for your school.

## View Student Attendance Pages

To view a student's attendance record in PowerSchool SIS, first search for and select the student. Then, click one of these links on the student pages menu:

- Quick Lookup – Shows meeting attendance for last week and this week by period, for a student, and attendance totals by term
- Attendance – Shows a complete view of a student's attendance data for the current term by class, in a grid format
- Enter Attendance – View and/or update a student's current week of attendance data in a matrix format

## Update Attendance for Students

Many schools require that contact be made with each home of students who have been marked absent one or more periods during the school day. As you contact parents about a student's absence, you may need to adjust some students' attendance codes. For example, you talk to a parent who explains that the student went to the doctor because of an illness. Depending on your school and district attendance policy, you may need to change the student's attendance from absent to parent-excused absent.

Also, enter attendance for a student or group of students for future dates. For example, the girls' volleyball team is playing in the state tournament for the next two days. Excuse the members of the team for the days they will be at the tournament. Future attendance that you enter for students appears for teachers in PowerTeacher and Unified Classroom automatically.

It is important to remember that no matter when and how you record attendance, you should follow the same attendance process. Every school handles attendance differently.

## Update Attendance for the Current Week

If a parent calls the school office prior to the start of the school day to report a child's absence, office staff can mark the student absent before the teacher takes attendance. The teacher will not have to mark the student absent.

Keep in mind that after an office staff member enters attendance information for a student, teachers cannot change that record. The office staff member must make any needed changes.

Using PowerSchool SIS, enter meeting attendance, daily attendance, interval attendance, or time attendance. A student's daily attendance record, for example, shows whether he is absent or tardy, and displays his arrival and dismissal times for the whole school day.

Take meeting and interval attendance on the Meeting Attendance student page. The primary difference between the two attendance-taking methods is that for meeting attendance, a student has one attendance record per period.

For interval attendance, a student can have multiple attendance records per period, based on the specified interval. Interval attendance may not look different from meeting attendance if the period length is less than or equal to the specified interval duration defined on the Attendance Preferences page.

Time attendance is a way to add attendance values by entering total minutes or hours for a given day. Schools use time attendance to enter work experience hours or independent study hours.

## Meeting Attendance Records

To record meeting attendance for the current week, select a student and click **Enter Attendance**. Change meeting attendance by choosing an attendance code from the "Current attendance code" menu. Then click the appropriate attendance cell to insert the selected code. Click **Set All** under the date to change attendance for all periods of the day. Use the Comment icon to record any information about the absence. After you make the changes, click **Submit**.

Using the clock in/clock out function within meeting attendance, school personnel can now clock a student in and out of school on the Enter Attendance student page in order to calculate a student's presence/absence amount based on actual minutes attended.

The clock in/clock out function is disabled by default. To enable the feature, update the attendance preferences. From the Setup section of the main menu, click **School**. In the Attendance area of the School Setup page, click **Preferences**. On the Attendance Preferences page, locate the "Attendance recording methods" area and verify that **Meeting** is checked. Then check **Enable Clock In/Clock Out** and click **Submit**.

To clock a student in or out for the day at a school that uses meeting attendance, start by searching for and selecting the student's record. In the student pages menu, click **Enter Attendance**. On the Edit Meeting Attendance page, locate the new row at the top of the weekly attendance grid. For each day of the week, the new row includes Meeting Time summary links that show the number of minutes the student attended school out of the number of total minutes in the school day (ex: 360/360 mins), as well as a clock icon. Click a meeting time summary link to view the time breakdown for the day.

To clock the student in or out, click the clock icon for the corresponding day. In the Adjust Meeting Time window, choose **Clock In** or **Clock Out** from the first menu. Then enter the time in the text box and adjust for AM or PM. To enter a comment regarding the reason for

# Student Attendance

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the adjusted time, such as **Dentist Appointment**, click the comment icon. To remove a clock in/clock out entry, click the – sign. To add a second entry, click the + sign. Then click **Save**. For example, add the clock out time as the first entry when a student checks out of school. Then add the clock in time as the second entry when the student returns to school.

The number of minutes the student was gone will be subtracted from the number of possible minutes the student could attend school for the day, and that value will be reflected in the meeting time summary link on the Edit Meeting Attendance page

## Daily Attendance Records

To record daily attendance, search for and select a student. Then click **Attendance** and **Daily**. Select the day of the week for the attendance change. Change the attendance code and click **Submit**.

To modify the time in and time out, search for and select a student, select the Attendance page and **Daily**, and click the Clock icon. Then complete the Time In and Time Out fields, add a comment regarding the reason for the shortened attendance, and click **Submit**. PowerSchool SIS calculates the minutes that the student attended school that day. Click the time link from the Daily Attendance page to review the comments or to make changes.

## Update Attendance for Future Dates

In some instances, students know ahead of time that they are going to be absent. For instance, a family is going on vacation or a team has an event during the school day. Use these methods to update attendance for either a single student or multiple students.

### Future Attendance Records for a Single Student

To record attendance for a future day for a student, select the student on the Start Page and then click **Attendance** > **Change Meeting Attendance**. On the Attendance Change page, enter the date range and the periods (meetings) to be changed.

In the "Codes to scan for" list, select a code or codes to search for, or use the default selection, **All**, to search for all codes. From the "Attendance code to set" menu, select a code. The attendance codes you searched for will be replaced by the attendance code you chose from the "Attendance code to set" menu. Click **Submit**.

### Future Attendance Records for a Group of Students

To record attendance for a future date for a group of students, select the group of students on the Start Page. Then click the Select Function arrow and select **Attendance Change**. On the Attendance Change page, enter the date range and the periods (meetings) to be changed. In the "Codes to scan for" list, select a code or codes to search for, or use the default selection. From the "Attendance code to set" menu, select a code. Click **Submit**.

## Update Attendance for Multiple Days

Many times, parents call to excuse a student for several days. Use the Attendance page to change attendance for multiple days.

1. Select the student
2. On the student pages menu, click **Attendance**
3. Click **Change Meeting Attendance**
4. In the "From this Date" field, enter the first day of the absence



# Student Attendance

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5. In the "To this Date" field, enter the last day of the absence
6. For "Meetings to scan," click **Select All** to scan all periods for a certain attendance code or codes
7. For "Code(s) to scan for," use the default **All** to scan for all attendance codes
8. From the "Attendance code to set" menu, choose an attendance code
9. Select **Overwrite** so the code for the known event (vacation, medical leave, or in-school suspension) cancels another event, such as a field trip
10. Add a comment to document why the student will be out of school
11. Click **Submit**

## Update Attendance for a Group of Students

Use the Attendance Change group function to update attendance for a group of students.

1. Select a group of students
2. Click the Select Function arrow and choose **Attendance Change**
3. Enter the date range
4. Select the meetings to scan
5. Select **All** to scan for all attendance codes
6. From the "Attendance Code to Set" menu, choose the code you want PowerSchool SIS to record for the group, such as **School Excused**
7. Select **Don't Overwrite** to preserve previously entered attendance codes for future family vacations or medical leave
8. Enter a comment
9. Click **Submit**

## Update Attendance for Students in One Class

Office staff members can enter attendance for a teacher's class in PowerSchool SIS. On the Start Page, click **Teacher Schedules**. Click a teacher's name. Then click either the Chair icon to enter attendance for the current day, or the Grid icon to modify past, current, and future attendance for students in the class.

1. On the Start Page, click **Teacher Schedules**
2. Select a teacher

# Student Attendance

- For the Homeroom class, click the Grid icon in the Attendance column

Start Page > Teacher Schedule - Emery, William K 13073

### Teacher Schedule - Emery, William K 13073

Display today's sections PowerTeacher Pro **New**

<input type="checkbox"/>	Expression	Term	Course #	Course	Sec #	Room	Enrollment	Attendance	Lock
<input type="checkbox"/>	1(A)	18-19	HR	Homeroom	42	25	20		
<input type="checkbox"/>	2(A)	18-19	EL401	4th Grade English	42	25	20		
<input type="checkbox"/>	3(A)	18-19	EL402	4th Grade Math	42	25	20		
<input type="checkbox"/>	4(A)	18-19	EL403	4th Grade Social Studies	42	25	20		
<input type="checkbox"/>	5(A)	18-19	EL404	4th Grade Science	42	25	20		

Make all students listed above the current selection

**Unlock Selected Sections** ▾

- Choose an attendance code
- Click in the student's cell for the correct day and the code will be updated automatically

### Record Meeting Attendance: Homeroom - 1(A)

**You have unsaved changes**

**Attendance Code:** T (Tardy) **Date Range:** 02/11/2019 - 03/08/2019 **Comments:**

**Buttons:** Edit, Display, Cancel, Submit

Students (20)	Total		2/11 - 2/15					2/18 - 2/22					2/25 - 3/1			
	A	T	M	T	W	H	F	M	T	W	H	F	M	T	W	H
Bailey, Erik	-	-											T			
Cheng, Matthew	-	-														
Fredrickson, Channing	-	-														
Gonzalez, Sara	-	-														
Ham, Angelina	-	-											T			
Janousek, Sara	-	-														
Johnson, Eric	-	-														
Jordet, Amanda	-	-											T			
Lewis, Janna	-	-														

- Repeat the process for any other students
- Click **Submit**

## Attendance Management

Teachers take attendance through PowerTeacher. Since the teacher usually does not know the reason for a student's absence, limit which codes are available for the teachers to enter—typically only the codes for absent and tardy. As soon as teachers take attendance, student attendance information is available to school administrators, parents, and students.

Teachers take attendance using the following steps:

1. On the PowerTeacher Start Page, click the Chair icon next to the class for which you want to take attendance
2. Select the attendance code
3. Select the date, if other than today
4. Click the cell next to a student's name to assign that code
5. Click the Comment icon to enter a comment about the attendance code
6. Click **Submit**

Even if all students are present, teachers must click the Chair icon to open the attendance screen, and then click **Submit**.

## Find Teachers Who Have Not Taken Attendance

The Attendance page, located on the Start Page under Functions, contains several tabs. Use the Reports tab to run predefined attendance reports that provide information such as which teachers have or have not submitted attendance, or student attendance that has been recorded using certain attendance codes.

To get school attendance information at a glance, select the Meeting tab and view two helpful data summaries:

- The total number of students who were marked with an attendance code (organized by attendance category)
- The school-wide percentage of attendance submission for the current day

The screenshot displays the 'Attendance Management' interface. At the top, there are tabs for 'Reports', 'Daily', 'Meeting', and 'Consecutive Absences'. The main heading is 'School Attendance Information for 2/25/2019'. Below this, there are two summary sections: 'Student Counts' and 'Attendance Submission Status'. The 'Student Counts' section shows four categories: Absent (15), Unexcused (15), Tardy (13), and Excused (5). The 'Attendance Submission Status' section shows a progress bar for '12%' completion, with '14 / 118 Section Meetings' and options for 'Incomplete' and 'Complete'. Below these sections is a filter section for 'Absent' with a search box containing 'V,P,A,X,O,U' and 'Apply' buttons. At the bottom, there is a table titled '1-10 of 15 Students' with columns for Name, Current Grade Level, Home Phone, and four columns (1, 2, 3, 4) for attendance codes. The table lists two students: Anderson, Cody N (Grade 9, Home Phone 1-555-555-2169) and Bailey, Jenilyn H (Grade 9, Home Phone 1-555-555-2481).

Name	Current Grade Level	Home Phone	1	2	3	4
Anderson, Cody N	9	1-555-555-2169				A
Bailey, Jenilyn H	9	1-555-555-2481	A			

# Attendance Management

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Schools that use daily attendance have similar options on the Daily tab.

If your school is tracking consecutive absences, click the Consecutive Absences tab to view which students have attendance problems.

## View the Teacher Attendance Submission Status Page

In addition to accessing the Teacher Attendance Submission Status report from the Attendance page, view attendance submission progress for all the teachers at the school. Click the Reports tab on the Attendance page and then click **Teacher Attendance Submission Status**. This report provides a summary of the status of attendance submissions overall, including color-coded indicators that show the teachers' statuses at a glance:

- The names of teachers who have not submitted attendance for any of their classes will appear on the report with red bars and red exclamation points
- Teachers who have submitted attendance for some of their classes will appear with yellow bars and yellow exclamation points
- Teachers who have submitted attendance for all their classes will appear with green bars and green check marks

For more detailed information, click a teacher's overall indicator to view data for each section.

## Run the PowerTeacher Attendance Report

Run the PowerTeacher Attendance report as another method to see which teachers have not submitted attendance. If your school takes meeting attendance, you might run the report each period. If your school takes daily attendance, you might run it once or twice a day. Both the Teacher Attendance Submission Status and PowerTeacher Attendance reports indicate which teachers have not submitted attendance

1. On the Start Page, click **Attendance**
2. Click the Reports tab
3. Click **PowerTeacher Attendance**
4. For "Date to Scan," use the default date of today
5. Check the period(s) to scan
6. Click **Submit**
7. On the Report Queue page, click **Refresh**
8. When the status is completed, click **View**

The report opens in your browser.

9. Click the browser's Back button to return to PowerSchool SIS

## Attendance Reports and Verification

Use PowerSchool SIS reports to gain an understanding of the school's overall attendance picture. Before you submit regulatory compliance reports, run attendance reports to conduct an internal audit of the school's attendance records. Here is a sample of PowerSchool SIS attendance reports.

### Absentee

To find students who were marked absent, run the Absentee report in either Daily mode or Meeting mode. Run the Absentee report as needed, as you would run the PowerTeacher Attendance report.

Use the Absentee report to generate single-day, period-by-period attendance information. This report lists students who match the attendance code(s) you specify. Generate additional information, such as the student ID number, grade level, phone number, and verification information.

To search, use any attendance code or combination of codes, except the Present code (blank). To modify attendance information for a student on the report, click the student's name to open the student pages menu. To return to the report, select the report from the report queue.

To run the Absentee report:

1. On the Start Page, click **Attendance > Reports > Absentee Report**
2. Choose the attendance mode to scan
3. Choose to include either all students or the selected group of students
4. Check the Grades check boxes to narrow the students included in the report by grade level
5. Select the attendance codes to scan
6. Enter the date to scan
7. Check the Period(s) check boxes to narrow the classes included in the report
8. Check **Include Student Number** to place the student number on the report
9. Enter the number of blank lines to place between student names
10. Check **Include Verification Line** to place additional fields for recording the name of the person contacted to discuss the student's attendance, absence, and verification details, and the initials of the staff member who contacted the parent or guardian
11. Click **Submit**
12. On the Report Queue page, click **Refresh**
13. When the status is completed, click **View**
14. Choose **File > Print** to print the report

Because the Absentee report includes the home phone number for each student, use the printed copy of the report to contact each student's home and record the pertinent information about his or her absence.

# Attendance Management

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Also, at the bottom of the Absentee Report page, click **Find teachers who have not taken attendance** to verify all teachers have taken attendance.

## Student Attendance Updates

Use the Attendance student page to update student attendance as you make contact with each student's home or receive excuse notes from students. Use the Student Screens group function to quickly access each absent student's Attendance page. Access the Group Functions page from the Absentee Report.

1. At the bottom of the Absentee Report, click **Functions**
2. Click **Student Screens**
3. For which screen, choose **Attendance**
4. Click **Submit**
5. Click each student's name and use the Attendance page to update each student's attendance record

## Period Attendance Verification

On the System Reports page under the Attendance section, use the Period Att. [Attendance] Verification report to find students who have been marked absent in some of their classes, but not others. Specify the number of classes with not attendance code you want to search for. For example, if your school has seven periods per day, use the report to find students who were marked absent for six of the seven periods. Then ask the teacher who marked the student present to verify that the student was present that day. This report is most helpful when meeting attendance is used at the school.

To run the Period Att. Verification report, follow these steps:

1. On the Start Page, click **System Reports**
2. Click **Period Att. Verification**
3. Choose the week for which you will run the report
4. Enter a number to indicate how many "Present" periods to scan for, such as 2

PowerSchool SIS will find the students who were marked absent except for one or two periods on any given day, during the week you choose.

5. Select which students the report will evaluate
6. Click **Submit**
7. On the "Report Queue (System) – My Jobs" page, click **Refresh**
8. When the status says "Completed," click **View**

## Weekly Attendance Summary

Under Attendance, the Weekly Attendance Summary report shows a snapshot of the week's attendance data based on the attendance codes you request. All students enrolled in a class appear on the report, regardless of their attendance status. Run the report for all teachers and periods, or for certain teachers and periods. The report you choose depends on which attendance method (meeting or daily) is used at the school.

# Attendance Management

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Run a weekly attendance report for one teacher.

1. On the main menu, click **System Reports > Weekly Attendance Summary (Meeting)**
2. For Weeks, choose the current week
3. For Teachers, select the name of one teacher
4. Leave the Period(s) fields clear to scan all periods
5. For Absent, enter the excused attendance codes **P, S, I, O, V, F**
6. For Unexcused, enter the unexcused attendance codes **A, U, X**
7. For Tardy, enter the tardy attendance codes **T, TE**
8. For Show Sections, select **All Sections**
9. For Audit Students, choose **Ever in Class**
10. Check **Include Student Number** and **Include Verification Line**

Check the boxes on the right to save any of these settings as default values for the next time you run the report.

11. Click **Submit**
12. If necessary, click **Refresh**
13. When the status shows as "Completed," click **View**
14. Click the Back button on your browser to return to PowerSchool SIS

## Search by Grades/Attendance

Use this function to find students with multiple instances of a type of attendance. To run the report, specify a minimum number of classes needed to meet the search criteria, an attendance code and how many periods that code should be recorded for, and a date range. The report can be used to identify grade or attendance issues.

1. On the Start Page, select a group of students
2. Click the Select Function arrow and choose **Search By Grades/Attendance**, or click **Special Functions > Search By Grades/Attendance**
3. Choose which students to include
4. Enter the minimum number of classes needed to meet the search criteria
5. Clear all check boxes related to searching by grades
6. Check **Scan for attendance**

This report can also be used to correlate student grades and attendance.

7. Next to "Scan this attendance mode," choose **Meeting**
8. Choose the appropriate attendance code to scan, such as **U (Unexcused)** or **All Absent Codes**
9. Choose a comparator
10. Enter the number of instances of the code to search for in the Periods field

# Attendance Management

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11. Either enter a date range or select **Scan all attendance records**
12. Select **Make this the current selection of students**
13. Click **Submit**

On the Group Functions page, select a function to perform for the group or click the number of students returned to view their names in a list.



## Student Behavior and Discipline

You have two choices when recording discipline issues: Incident Management or Log Entries. Depending on your regulatory compliance reporting requirements or your school policy, you may use one or the other. Some schools may even elect to use both. Each option is slightly different. Use Incident Management to record the interaction between witnesses, offenders, and victims in relation to a discipline incident. Use Log Entries to record the actions of an individual student. Log entries are used to record more than just discipline issues, such as counselor meetings and attendance concerns. Teachers can create log entries, but not incident management entries. Teachers cannot view a student's log entries.

### Using Log Entries

The Log Entries student page lists student contact entries. Record your contact with students, such as counseling sessions or special education meetings. View previous entries you recorded or entries other staff and administrators recorded.

Log entries fall into many categories, including discipline, health, and attendance. When setting up group security, your PowerSchool SIS administrator selects which log types members of each security group may access.

To add a new log entry, complete the following steps:

1. On the Start Page, search for and select the student
2. In the Administration section, click **Log Entries**
3. Click **New**
4. Edit the Date & Time and Author fields
5. Choose a log type

Use the Log Type field to categorize the entry. Your PowerSchool SIS administrator sets up the log types and subtypes at the district office.

6. Choose a subtype

The Subtype is optional but defines the entry further.

7. Choose a consequence if the entry is discipline related
8. Enter a title for the entry

The log type doesn't appear on the Log Entries pages, so use the Title field to describe the meeting or session with the student.

9. Enter log entry text to describe the meeting in more detail, such as who attended, problems resolved, or decisions made
10. Enter an action date, if needed
11. Complete any required compliance reporting and/or civil rights data collection information
12. Click **Submit**

# Student Behavior and Discipline

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## Searching Log Entries

Use the Search Log Entries special function to view, print, or export all log entries that relate to a particular event or type of log. For example, search for students who have a disciplinary log entry within a certain date range.

To access the search log entries feature from the Start Page, click **Special Functions**, and click **Search Log Entries**. When you specify more than one search criteria on the Log Entries Search page, each criteria set functions as an “and” search, not an “or” search. Also, you can only search the log entry types that you have access to. For example, the school nurse might be the only person able to search medical log entries.

## Reporting Log Entry Discipline

Use the system discipline reports to view a list of student discipline log entries by subtype for the date range you specify or view an overall summary of discipline log entries. Incidents are not included in either of these reports.

On the Start Page, click **System Reports** and find the Discipline section. Use the Discipline Log report to view a list of student discipline incidents by subtype for the date range you specify. Use the Discipline Summary report to view a summary of student discipline logs by gender, ethnicity, special programs, and grade level for the date range you specify.

## Using Incident Management

Incident Management is a comprehensive tool used to record discipline incidents.

View the incident data visualizations and grids by clicking **Special Functions** and then choosing **Incident Management**.

By default, the Incident Management page displays counts of the top 10 incident behaviors and actions. You can set the tiles to display the behaviors and actions that you want to track by type and subtype, but you can always revert to the default settings.

Customized views are user-specific. The grid lists incidents associated with the behaviors and actions, based on the filters you set. At the district level, the incident list is filtered by the current calendar year. The default is the current school year for schools, but you can set custom date ranges, such as a span of two calendar years. You can also filter the incident list by selections such as attribute, object, and participant.

To make the filtered students your current section, first check the boxes next to the students’ names and then, below the list of students, click **Set Current Selection**. Click the Download arrow to save the list as a PDF or spreadsheet.

Unlike log entries, incident management entries can include more than one student. Incident reports may also include details about victims, witnesses, and other participants, as well as information about weapons or other objects that were used.

When you create a discipline incident, you will select incident types, codes, and subcodes that PowerSchool SIS administrators set up at the district level. The district setup ensures that all users in the district use the same criteria to create entries.

Security settings determine who can view, create, and edit incidents.

# Student Behavior and Discipline

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To record a new incident, open a new Incident page by clicking **Special Functions > Incident Management > Create New Incident**. You can expand and collapse each section of the Incident Detail page by clicking the arrow next to the section's title.

The Incident Description is the first section. Choose the incident type, which is the only required field. In the date and time fields, enter the date and time the incident occurred. Enter a title for the incident, keeping in mind that the title is what appears in the incident list search results. You may want to develop a naming convention at the district level to ensure consistency and to make searches more effective.

Enter a description to record more detailed information. Try to be precise, since Incident Management records remain with a student from school to school in the district. Next, choose location information from the menus and add a description if additional details are needed. If one person prepared the information, but another created the incident record, enter the name of the original report writer in the Prepared by field. Your name will appear as the creator after you submit the report. Finally, record any financial impact from the incident.

The next section of the Incident Detail page is the Incident Builder section.

Click the **+** sign next to Participants to search for the students and staff who were involved in the incident.

Add each person that was involved in the incident separately; follow these steps:

1. Enter the participating student's name

You will add how the student participated later.

2. Use the Type menu to search for students, staff, or others
3. Use the Grade Level menu to narrow the student search criteria
4. If the student involved in the incident is inactive, clear the Only Active check box
5. Use the Context menu to search for students who are enrolled at other schools in the district
6. Click **Search**
7. Select the student and click **Add**
8. If the person involved is not a student or staff member, click **Create Other**

Enter basic information about the person, such as name and gender, or define the person as unknown.

Next, add the participant's attributes. Use attributes to add information that is linked to state reporting requirements, such as reporting a participant who is a gang member or juvenile offender. Keep in mind that you can attach multiple roles to one person.

You can also add any of the four incident elements: actions, objects, behaviors, or attributes. Just click the **+** sign. Choose **Add Action** to add the disciplinary action taken as a result of the incident. Click **Add Object** to add any objects that were used in the incident, such as a weapon or a spitball. To add the offense committed during the incident, such as bullying or shouting, click **Add Behavior**.

# Student Behavior and Discipline

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Finally, click **Add Attribute** to add other characteristics, such as if the incident was gang-related or if a participant needed medical attention. Incident attributes differ from participant attributes in that they are not specific to one person. Assign the behavior, actions, objects, and attributes to the specific participants. Once you've added all of the incident elements, click **Submit Incident** to record the occurrence.

Once an incident has been recorded, view it by searching for a student and then selecting **Incident** from the Administration section of the student pages menu. The Incidents List page itemizes all incidents the student was involved in, regardless of the student's role. Click the incident ID number to view details for the incident. Use the Search Filter option if a student has more than one page of incidents or to look for a particular incident.

Click **Create New Incident** to create a new incident directly from the student page. Click the ID, title, or school name to review or modify the incident details.

## Reporting Incident Management Entries

ReportWorks contains three templates specifically tailored to incidents. Because these are templates, you aren't required to create the report, but the ReportWorks administrator is responsible for publishing the reports.

Use any of the following ReportWorks templates:

- Incident Management – CrossTab by School and Type: Provides a count of incidents by school and type. The report lists each school with incident totals for each incident type.
- Incident Management District Summary: Provides a summary of incidents by school. The report provides the ID, incident date, recorded date, type, and title for each incident. The report also contains the total number of incidents for the reporting period and the total number of incidents per school.
- Incident Management Participant Report: Provides detailed information about the incident, and lists the participants involved in the incident. Participant information includes behavior, actions, objects, and attributes associated to each participant. The report even includes the change history of the incident.

To run a published ReportWorks report, complete the following steps:

1. On the main menu, click **ReportWorks**
2. Select the report name
3. Complete any setup fields

Your ReportWorks administrator has the option to set up runtime controls for each report. Use the runtime controls to narrow the scope of the report results.

4. Click **Submit**
5. On the Report Queue page, click **Refresh**
6. When the status is completed, click **Completed**

## Understand Grade Functionality

Learn how grades entered in teachers' gradebooks are used throughout PowerSchool SIS and reported to students and parents.

### Current and Historical Grades

Current grades are traditional letter or percentage grades teachers enter in their gradebooks. These grades are continually recalculated when a new assignment grade is entered and are based on traditional grade calculations. Current grades are considered progress grades because until grades are stored using the Permanently Store Grades process, they can be modified.

Historical grades are point in time grades that represent the final grade for a term. At the end of the term, teachers notify their school's PowerSchool SIS administrator that they have finished entering the scores for the term and that final grades are ready to be stored. Once grades are stored, they cannot be modified by teachers.

Current grades are housed in the PGFinalGrades table. Historical grades are housed in the StoredGrades table. Understanding the difference between the two types of grades is crucial as there are many functions and reports where you must decide whether you will use current or historical grades.

### Storing Grades

For schools using standards-based grades, the grades are stored automatically whenever teachers enter the grades in their gradebooks. For storing traditional final grades, navigate to the Permanently Store Grades page by selecting **System > Permanently Store Grades**. Your first storing grades task is to select the correct term from the Final Grade/Reporting Term menu. These terms are the same as the terms used in the teachers' gradebooks and are found on the Final Grade/Reporting Term Setup page. Next, enter the correct store code. Store codes are usually the same as the final grade term.

Next, your school administrators need to decide which method to use to store enrollment and grade information.

The first storing method is the Exclusion method. Choose from two ways to exclude enrollments. The first way excludes enrollments for students who enrolled in a course after a specified date. The second way excludes enrollments for students who dropped a course before a specified date. Choose one or both of the options.

The Inclusion method of storing grades includes only enrollments that are both currently active and were active on a specified date during the grading term. For example, suppose the last date that students could enroll in a class and still get credit for it was November 24th. When grades are stored, only currently active students who were enrolled on or before November 24th would be included. So students who enrolled before November 24th would get credit for the course, and students who dropped the course after November 24th would also get credit. Students who dropped late will still get credit for the course that they've been in for most of the marking period. This method is commonly used in elementary schools.

# Understand Grade Functionality

If you need to store final grades for a specific group of students (such as the early graduates who need final transcripts before the school year ends), you can store grades for your current student selection, a course section, a grade level, a course track, or students whose school exit date falls within a specific date range using the additional filter options.

Depending on your district or school policies, you must decide how much credit for each class will be stored at the end of the term. (The classes are divided and identified by their term length on the Permanently Store Grades page.) For example, what percent of a yearlong course will you store? Will you store semester courses, or will you store quarters only? These terms are set up on the Years & Terms page and may not include all of the Final Grade/Reporting Term options.

Some students take courses at other schools in the district. You need to decide which of these course enrollments and grades will be stored.

Additionally, course credit may be affected by attendance. You must determine whether you need to withhold credit according to school or district policies.

Select additional filter options based on your requirements.

### Which Grades

Use this Final Grade/Reporting Term: S2 \*  
Save with this Historical Store Code: S2 \*

### Exclude/Include Class Enrollments

Exclude enrollment records where the student enrolled in the class after this date: 7/12/2019  
 Exclude enrollment records where the student dropped the class before this date: 2/11/2019  
 Include only enrollment records that are currently active and that were active on this date: 00/00/0000

### Additional Filter Options

Classes by term length		Store	% of course credit
2018-2019	(07/30/2018 - 07/26/2019)	Store with credit	50 %
Semester 1	(07/30/2018 - 01/27/2019)	Do not store	%
Semester 2	(01/28/2019 - 07/26/2019)	Store with credit	100 %

If you are storing grades for a term that is not in progress or has only recently passed, you may need to display all terms. If a term was already stored, you will overwrite the grades for that term and may affect graduation credit, GPAs, and transcripts.  
Show all terms?  No  Yes

### Options for classes enrolled at other schools

Store grades for classes enrolled at: All schools  
Record the school name of: This school

# Understand Grade Functionality

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You should store grades at the end of every marking period, even if you don't award credit at the end of every marking period or do not display each marking period on student transcripts. Storing grades ensures that you will have a record of each official report card issued by the school. Therefore, after some marking periods, you may have to store grades more than once.

After storing grades, your system administrator must update the source of data to historical on the Quick Lookup Preferences page to ensure that the grades on transcripts and report cards are the same as what staff and teachers view on the Quick Lookup page and the same as what students and parents view in PowerSchool SIS Student and Parent Portals and PowerSchool Mobile.

## Grade Point Averages (GPAs)

Each GPA calculation method contains a GPA formula. The first step to understanding GPA formulas is to understand how you put them together. GPA formulas contain four parts: the total sum, the divide by function, the number of decimal places, and the rounding function. The formula is like an algebraic equation in which the parentheses indicate the order of operations.

For example, the formula for a simple GPA calculation is:

```
round((sum(gpa_gpapoints())/gpa_count()),4)
```

The sum function totals the GPA points. It is followed by open and closed parentheses that tell PowerSchool SIS to calculate the value before continuing. The count function defines what the total is divided by and is also followed by parentheses to tell PowerSchool SIS to calculate the value. The 4 is the number of decimal places to which the GPA calculates out. Round means the resulting GPA will be rounded.

Now think of the formula for a simple GPA calculation in terms of mathematical operations:

- Calculate the sum of the GPA points
- Count the number of grades
- Divide the sum of the GPA points by the grade count
- Round the result to 4 decimal places

Write either a simple or weighted formula by following these steps in order:

1. Write out the calculation, such as "total GPA points divided by the number of grades"
2. Convert common terms into GPA functions and add parentheses ( ) to the end of the functions to tell PowerSchool SIS to find the values

You can find more information about commonly used functions using the Help menu.

3. Add PowerSchool SIS operators
4. Add mathematical operators

## GPA Calculation Methods

Use GPA calculation methods to define the formula and criteria used to make GPA calculations. The GPA formula is impacted by several settings, such as the GPA calculation type, grade scale, and multiple query options.

# Understand Grade Functionality

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Create and edit GPA calculations at the district level. From the District Office Start Page, click **District > GPA Calculations > Calculation Methods**.

PowerSchool SIS has four default GPA methods that use specific formulas:

- Simple
- Simple Percent
- Weighted
- Weighted Percent

Any changes or additions to a calculation method affect all the schools on your server, so don't modify the default methods. Create a new GPA calculation method to modify the formula or change any of the method's settings. Remember to update your honor roll levels, class rank setup, and GPA Student Screens page accordingly.

Follow these steps to add a new GPA method to an honor roll calculation that uses students' current grades.

1. Navigate to the District Office
2. Click **District > GPA Calculations > Calculation Methods**
3. Copy the formula for the Simple calculation method
4. Click **New** to create your own method
5. In the "Method name" field, enter a name, followed by your assigned number
6. Enter a description for your method
7. In the Formula field, paste the Simple GPA calculation method that you copied
8. Open the Calculation type menu and select **Current** so that current grades will be used for the GPA calculation
9. From the "Grade scale" menu, choose **Default** or leave this field blank to use the grade scale associated with each course/section
10. In the Query Options section, leave the fields for Terms, Grade levels, School years, and Credit types blank so you can set query options through a data access tag later
11. In the "Only include grades" section, check **that count in GPA**
12. Click **Submit**

## Honor Roll

The honor roll setup is similar to the GPA setup. First, define each honor roll method, such as Honors or Principal's List. Then add the honor roll levels, such as Highest Honors, High Honors, and Honorable Mention. Every honor roll method must contain at least one honor roll level.

Make sure you set the evaluation order properly. PowerSchool SIS evaluates students against the highest honor roll level first, so you must set the highest level as level one. Students must meet all the criteria you specify to receive that honor level. If they don't meet the criteria, PowerSchool SIS evaluates the students for the next level, and so on.



# Understand Grade Functionality

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If the honor roll needs a separate GPA calculation method, define the method. To make running the honor roll during the school year easier, define a GPA method for each marking period that you store honor roll. Since honor roll is based on a specific grading period's GPA, the GPA calculation method must be specific to a term. Defining different methods for each term means you don't have to remember to go back and change the term specified in the GPA calculation method.

Next, define the honor roll method. Unlike GPAs, you set up honor rolls at the school level on the School Setup page. Begin by adding a new honor roll method by going to **School > Honor Roll > New**. Once you create the method, return to the Honor Roll Method page to add levels. Define each level for the honor roll method, along with criteria for each student to meet at that level. Format the GPA requirements, credit requirements (optional), and grade requirements. Grade requirements specify which grades the students must or must not have in order to meet the requirement. Remember to include the + (plus) and - (minus) grades if your school uses them.

Once you complete the setup, wait until the end of the term before you run a calculation. If you wish to work with a certain group, such as 12th-grade students, select the group on the Start Page. Then calculate the honor roll by going to **System > Calculate Honor Roll**. Select the students and enter the term that you're storing honor roll for. Finally, choose the honor roll method. If you use multiple methods for the same school, run each one separately.

Navigate to the Honor Roll student page to view a student's honor roll history, or to run the Honor Roll report to find all students who made the honor roll. Use the Honor Roll report to notify the parents of students who qualified, or to notify the local newspaper. Honor roll records can't be overwritten, so if you need to recalculate the honor roll for a term, delete the records through Direct Database Access (DDA).

## Honor Roll DATs

The honor roll data access tag (DAT) returns data based on existing honor roll records. Use any of the following DATs to place the student's honor roll record on a report card, certificate, or form letter.

Use this DAT to display the honor roll level (Honors, High Honors, Highest Honors) the student achieved for any High Honors honor roll records awarded for the S1 term:

```
^(*honorroll method="High Honors" term="S1")
```

Use this DAT to display the honor roll level the student achieved for any Principal's List honor roll records awarded during the student's 6th and 7th grades in the Q2 term:

```
^(*honorroll method="Principal's List" term="Q2" grade="6,7")
```

Use the following DAT to display the honor roll level the student achieved for any Scholarship honor roll records awarded for the S2 terms in the 2017-2018 and 2018-2019 school years. Use only the first year in a school term that spans multiple years. For instance, because most schools start in the summer, a full year name like "2017-2018" is common. However, you should use only the first year in the DAT, for example, 2017. If you omit this element from the DAT, PowerSchool SIS scans honor roll records from the current school year.

```
^(*honorroll method="Scholarship" term="S2" year="2017,2018")
```

# Understand Grade Functionality

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Use the following DAT to display the honor roll level the student achieved for any Scholarship honor roll records awarded for the Q3 term. The message value prints the text message for the honor roll level as defined on the Honor Roll Level page. For example, the message may read, "Congratulations! You have been awarded the Gold Team scholarship for this year!"

```
^(*honorroll method="Scholarship" term="Q3" result="message")
```

## Set Up an Honor Roll Method

Set up an honor roll method and define the levels using a GPA method.

1. On the Start Page, click **School > Honor Roll > New**
2. Enter a name for the method
3. Use the default values for the remaining fields and click **Submit**
4. Next to your method, click **Levels > New**
5. Enter a name and description for the first (highest or strictest) level
6. Choose a calculation method and GPA result
7. From the Comparison field, choose a comparison and enter a GPA value to set the threshold for this level
8. In the Grade Options section, select and identify any grades that include or exclude a student from this level and click **Submit**
9. Repeat for all levels of the honor roll

## Calculate the Honor Roll

Calculate the honor roll for students using an honor roll method and run the Honor Roll report to view the results.

1. On the Start Page, select a group of students
2. From the main menu, click **System > Calculate Honor Roll**
3. Choose **The selected [xx] students**
4. For the Store code, enter the appropriate store code
5. Select your Honor Roll method and click **Submit**
6. Click **System Reports**
7. From the "Grades and Gradebooks" section, click **Honor Roll**
8. Select the group of students you are working with and enter a title for your report
9. Select your honor roll method from the menu
10. Enter the appropriate store code in the Store Code field
11. Leave the remaining fields blank and click **Submit**

# Understand Grade Functionality

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## Class Ranking

GPA affects more than just honor roll. GPA is also used in the class rank calculation. GPA and class rank go hand in hand, so you must set up both properly for the results to be correct. Unlike GPA, class rank is not dynamic. Class rank changes according to the recalculation schedule. Therefore, if you make a change to the GPA value of a stored grade, you must recalculate the class rank.

To create a class rank method, navigate to **School > Class Rank > Class Rank Methods > New**. Enter a description for the class rank method and choose a GPA calculation method for the ranking. Determine which grades to include, whether to exclude students from the class rank, and whether to include early graduates. Then save the method.

Return to the Class Rank Settings page and use Recalculation Frequency to select how often class rank is recalculated. Or, click **Recalculate now** to recalculate class rank immediately. Run the Class Ranking report on the System Reports page to get a list of students' rank and GPA by grade level.

The Class Ranking report lists students by class rank from the top student in the class, down. However, what if you need an alphabetical list of students and where they rank? Use the List Students group function. First, select a grade level of students on the Start Page, click the Select Function arrow, and choose **List Students**. Insert the LastFirst field and the \*class\_rank\_out\_of data access tag. Choose to export the list, if needed, and sort by LastFirst. Then click **Submit**.

Follow these steps to set up a class rank calculation using a GPA method.

1. On the Start Page, click **School > Class Rank > Class Rank Methods > New**
2. Enter a description, followed by your assigned number
3. Choose a calculation method and GPA result

If you are going to use the ^(\*classrank) data access tag (which defaults to the weighted GPA) to print the class rank on a transcript, choose **Weighted** from the GPA Calculation Method menu. When using a different calculation method, use the calculation method name in the data access tag.

4. Use the default values for the remaining fields and click **Submit**
5. In the breadcrumbs, click **Class Rank Settings**
6. Click **Recalculation Frequency**
7. Choose how often to recalculate class ranks
8. Click **Submit**

## Cumulative Info Page

Access information such as a student's class rank, total credit hours, and GPAs all in one convenient place, the Cumulative Info student page.

Your PowerSchool SIS administrator sets up the page at each school with a PowerSchool SIS project manager during your district's implementation process. You can add additional fields to the page, such as other GPA calculations or a running total of days the student is absent using data access tags (DATs). Add additional fields of information to the Cumulative Info page at any time.

# Understand Grade Functionality

To set up or add information to the Cumulative Info page, on the School Setup page in the Grading section, click **GPA Student Screens**. The four items listed in the table are the standard setup. First, define the row title, which identifies the calculation that the users see. Then, enter the data access tags.

Row Title	Data
Cumulative Weighted GPA	~(*gpa method="weighted")
Cumulative Simple GPA	~(*gpa method="simple")
Cumulative Class Rank	~(*classrank method="simple" result="rankoutof")
Cumulative Credit Hours	~(*credit_hours)

## Formatting GPA Data Access Tags

Format each data access tag (DAT) with the same elements. Begin with a tilde, an open parenthesis, and an asterisk. Next, enter the code and the comparator. Then place the GPA method name in quotations. If you are not sure of the GPA method name, navigate to **District Setup > GPA Calculations > Calculation Methods**. The name you enter in quotations must match one of the GPA methods created at the district level. If the name does not match, no calculation will appear on the Cumulative Information page.

DATs are powerful because you can define the code very specifically, such as narrowing the GPA to a certain term. When you finish, complete the DAT with a closed parenthesis. Although you can use a caret or a tilde interchangeably in DATs in other areas of PowerSchool SIS, use a tilde when formatting DATs on the GPA Student Screens page.

## Adding Additional Fields of Information

If you want additional fields of information, such as a phone number, to appear on the Cumulative Info page, add them at any time. Fields on the Cumulative Info page are view only, but you can use them to view student information in one place instead of navigating to different student pages. For example, if you make frequent calls to parents to discuss the information on a student's Cumulative Info page, add a phone number field so that you don't have to navigate to the Demographics page. You can also add any custom fields that school administrators create, such as a student's counselor field. To add a field, use a tilde, an open parenthesis, the field name, and then a closed parenthesis, such as  
`~(*contact_info;rel=mother;val=email)`

# Enter and Update Historical Grades

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## Enter and Update Historical Grades

At the end of the term, historical grades for completed courses are stored and then appear on transcripts. Use the Historical Grades student page to view stored grades, enter grades for students who take classes at another school, and edit existing historical grade records.

### Single Historical Grade Entries

Follow these steps to enter a single historical grade for a student who completed a class at another school.

1. Search for and select the student
2. Under the Academics section, click **Historical Grades > Single New Entry**
3. Enter the name of the school where the student earned the grade
4. Enter the year the course was completed; for example, for the year 2018–2019 enter **2018**
5. Enter the store code for the grading term

Store codes are set up on the Final Grade/Reporting Term Setup page for each school.

6. Enter the student's historical grade level for that year
7. If known, enter the course and section number for the corresponding course and section in the school schedule

Associating the grade with a section links the grade to a course name, teacher's name, GPA points, and credit type. Complete this field if you set up graduation requirements using course numbers.

(a) Course number - Section number  -

8. If there is no corresponding course and section, enter the course name
9. Enter the teacher's name, if known
10. Enter the grade that the student earned
11. Enter the corresponding GPA points for that grade
12. Enter any added value, if applicable
13. If used, enter the percentage that corresponds with the grade

# Enter and Update Historical Grades

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14. Enter the citizenship grade, if applicable

Grade	A-
GPA points	3.62
Added value	0
Percent	92
Citizenship	H

15. Enter the credit earned for that grade, and the potential credit that could be earned for that class

16. Enter the credit type

Complete this field if you set up graduation requirements using credit types.

17. If the student repeated the class to earn a better grade, choose the grade suppression policy

18. The PowerSchool SIS administrator sets up the grade suppression policy for the school, so you won't see the menu if the school doesn't use the policy.

The grade suppression policy suppresses the previous grade and replaces it with the new historical grade you entered for the same course.

19. Select whether to include or exclude the grade from transcripts, GPA calculations, class rank, and honor roll, and (if applicable) graduation calculations

20. Enter any teacher's comments recorded for this grade

21. Click **Submit**

## Multiple Historical Grade Entries

Follow these steps to enter multiple transcripts for one student.

1. Search for and select a student
2. Click **Historical Grades > Multiple New Entries**
3. Enter the name of the school where the student earned the grades
4. Enter the year for the grade information; for example, for year 2018–2019, enter **2018**
5. Enter the historical grade level of the student for that year
6. From the Grade Suppression Policy Override menu, choose the policy your school uses

You won't see this menu if your school doesn't use the grade suppression policy.

# Enter and Update Historical Grades

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7. Enter a store code for each term that corresponds with the grade

Store codes are set up on the Final Grade/Reporting Term Setup page for each school.

8. Enter the course and section number for the corresponding course and section in your schedule

Associating the grade with a section assigns the course name, teacher's name, GPA points, and credit type. Complete this field if you set up graduation requirements using course numbers.

9. If there is no corresponding course number, enter the course name

10. Enter the teacher's name, if known

11. Enter the credit type

Complete this field if you set up graduation requirements using credit types.

12. Select whether to include or exclude the grade from GPA, class rank, honor roll, and transcripts

13. For the corresponding store code, enter the grade the student earned for the class

14. Enter the corresponding GPA points for the grade

15. If used, enter any added value for the grade

16. If used, enter the percentage that corresponds with the grade earned

17. Enter the credit earned for the grade, followed by the potential credit that could be earned for the class

18. Repeat steps 7–17 for up to seven additional classes

19. Click **Submit**

## Change a Historical Grade

Edit a historical grade when there is an error in the record. Be sure to follow the established procedures related to the school's policy.

1. Search for and select the student
2. Click **Historical Grades**
3. On the Historical Grades page, click the incorrect grade
4. Change the necessary data, such as:
  - Historical grade level
  - Course information
  - Grade information
  - Attendance information
  - Credit information

# Enter and Update Historical Grades

- Teacher's comments

If you change the grade, you may have to edit the percentage and GPA points, since they are not updated automatically. Any edited information appears in the "Change history" section.

5. Click **Submit**

## Search for Students Who Are at Risk of Failing

Analyze trends in student performance using attendance, grades, and discipline data. Use the data and its related trends to help identify students who are at risk for failing one or more of their classes.

## Using the At Risk Students Dashboard

Configure the Dashboard page to show counts of at-risk students at a school or throughout the district for the current term. From the main menu, under Functions, click **Dashboard**. At-risk student counts, shown on tiles, are segmented into levels of high, moderate, and some risk based on a risk index derived from student grade and attendance data.

Modify and customize the risk index criteria for the district or for selected schools so you can identify students with low grades or attendance marks and take action as soon as possible. For example, to see a list of the students who are in the high-risk category, click the High tile on the At Risk tab of the Dashboard page.





Below the tiles, a grid displays a list of at-risk students that you can filter by the risk index level tiles. The grid lists a risk score for each student of between one and four for grades and attendance, as well as the aggregate risk index, which is the average of the grade and attendance risk scores. Administrators may sort, filter, and download student lists or navigate to a student's record to analyze his or her problem areas.

From the District Setup page, administrators use the At Risk Setup page to set up the threshold values for the risk index tiles, as well as the criteria for the grade and attendance risk scores. By default, three categories of tiles are used to illustrate which students are exhibiting some level of risk on the four-point scale.

- The default tiles are High, Moderate, and Some risk
- The tiles map to risk index values of above 3, above 2, and above 0
- They can be set to values between 0 and 4 with up to two decimal places
- Up to a total of six tiles may be added

The grades index is based on current final grade percentages. For student grades, the default risk index uses the color grade scale values shown here.

Grades

Points	Percentage of Grades	Grade Scale Color Level
4	At or above 50%	At or Below 2  Orange
3	At or above 35%	At or Below 2  Orange
2	At or above 20%	At or Below 2  Orange
1	At or above 5%	At or Below 2  Orange



# Enter and Update Historical Grades

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The default grade scale color levels are set at or below level 2/orange, which equates to grades of D and F in an A, B, C, D, F grade scale.

For attendance, the default risk index uses the following ADA/ADM ratios.

**Attendance**

Points	ADA/ADM %
4	Below 94
3	Below 95
2	Below 96
1	Below 97

The risk index for attendance is based on the default computation for a student's percentage of average daily attendance divided by average daily membership, which represents an aggregate of student attendance at any given point.

# Manage Student Activity Eligibility

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## Manage Student Activity Eligibility

There are several ways to determine if students are academically eligible to participate in activities.

### Searching by Current or Historical GPAs

Suppose you want to run a report to find football players who are not eligible to play in the upcoming game. Perform the following steps to find them:

1. On the Start Page, search for the members of the football team, then click **Special Functions > Search By GPA**
2. Determine which group of students to scan; in this case, choose **selected [xx] students**

You can also search for students in a particular class section, students who are enrolled in a single period, students who have a certain teacher, or search for students who have a specific day cycle (A or B).

3. Choose one of the following criteria for the search:
  - If searching by cumulative GPA, choose the GPA cutoff criteria, enter the cutoff value, and choose a GPA calculation method
  - If searching by term GPA, enter the store code, such as **Q1** or **S2**, choose the term GPA cutoff criteria, enter the cutoff value, and choose a GPA calculation method
  - If searching by current GPA, choose the current GPA cutoff criteria, enter the value of the cutoff point, and choose a GPA calculation method

The screenshot shows a search interface with three sections for GPA criteria. Each section has a dropdown for the comparison operator and a dropdown for the GPA method. The first section is for cumulative GPA with 'greater than' and 'Grade Count'. The second section is for term GPA (Q2) with 'less than' and 'Weighted'. The third section is for current GPA with 'greater than' and 'Grade Count'.

4. For "Who were enrolled as of this date," enter a date
5. Click **Submit**

The students identified during the search become the current selection and are represented by a number at the top of the Group Functions page.

6. Click **Reports Menu > Student Schedule Listing**
7. Click **The selected [xx] students**
8. Enter a report title, such as **Ineligible for Participation**
9. Check **Course, Teacher, and Current grad**

## Manage Student Activity Eligibility

10. In the "Store code / final grade" field, enter a value
11. For the "Range of Periods" option, include all periods
12. For the "Range of Days" option, include all days
13. Enter the number of students to display between breaks in the report
14. Specify the pages to show
15. Click **Submit**

Use the report to show the football coach the names of the ineligible students, their courses, and their grades.

Ineligible for Participation					Apple Grove High School			
	A				B			
	1	2	3	4	1	2	3	4
<b>Alkinson, Andy G</b>	Technical English Grogan, Lynn N +	Speech Lura, Colleen R A-	French 2 Kyser, Kenneth -	Calculus Bryant, Renata L -	Beginning Acting Leier, Joshua P -	Geography Smith, Gerald R C+	French 2 Kyser, Kenneth -	Calculus Bryant, Renata L -
	A			B				
1	2	3	4	1	2	3	4	
	Health 12 Maxedon, Johnathon B-	Environmental Science Ngyuen, Jerry M B+	Studio Pottery Derringer, Malcom B F	Swimming David, Peter A	Environmental Science Ngyuen, Jerry M B+			

### Using the List Students Report

When you want to create a report quickly that includes fields of information or data for a selection of students, use the List Students function. To use the List Students function, search for and select a group of students. Next, click the Select Function arrow and, from the Group Functions menu, select **List Students**.

First, give the report a title. Define the columns that you want on the list by adding field names and/or data access tags and then assign each column a title. You may decide to include blank columns with only a column title. For example, if you create a list to track when you receive computer usage permission slips, add a column titled "Received" so that you can check that box for each student who submits the form.

Define how you want the list to be sorted by entering the field names in the "Optional: Sort Field Name" area and defining whether the list should be sorted in ascending or descending order by each field. For example, to sort the list alphabetically by students' names, enter **lastfirst** as the field name and use the default setting **>** for the direction. Then click **Submit**.

# Manage Student Activity Eligibility

Here are some examples of fields and data access tags that you might include in a list of student information. To view additional fields available for inclusion in the list, click one of the Fields links on the Student List page.

Field or Data Access Tag Name	Displays
LastFirst	Last name, first name
Grade_Level	Current grade level
504_Information	SEOP 504 information
EC_Athletics	SEOP extracurricular activities
*credit_hours	Total earned credit hours
*potential_credit_hours	Total attempted credit hours
*evaluate (^(*potential_credit_hours)- ^(*credit_hours))	Total unearned (failed) credit hours
*hours_requested	Number of credit hours requested for the next scheduling year
*class_rank_out_of	Class rank
*gpa	Cumulative weighted GPA
*period_info;2(A);course_name	Course names of classes that meet during period 2 on A days
*period_info;2(A);course_number	Course numbers of classes that meet during period 2 on A days
*period_info;2(A);teacher_name	Names of teachers who teach classes during period 2 on A days

Follow these steps to create a report that includes course credit information for all of the 12th-grade students.

1. On the Start Page, enter `grade_level=12;gender=f` in the search field and click the Search icon
2. Click the Select Function arrow and choose **List Students**
3. Enter a report title, such as **Credit Summary: Senior Girls** followed by your initials
4. Enter `*count` as the first field name so that the list will be numbered
5. Enter `lastfirst` as the second field name to include the students' full names

For a list of additional field names, click **Fields**.

6. Enter **Name** as the title for column 2
7. Enter `*credit_hours` as the third field name to include the credit hours that each student has accumulated
8. Enter **Earned Credit** as the title for column 3

## Manage Student Activity Eligibility

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9. Enter `*potential_credit_hours` as the fourth field name to include the number of credit hours that each student has attempted
10. Enter `Attempted Credit` as the title of column 4
11. Enter `*evaluate (^(*potential_credit_hours)-^(*credit_hours))` to include the number of credit hours that each student attempted but did not earn
12. Enter `Unearned Credit` as the title of column 5
13. Specify any additional columns that you want on the list by adding more field names and column titles
14. Select **Gridlines** to add lines between rows and columns
15. Indicate which field you want to sort the list by, such as `lastfirst`
16. Click **Submit**

To print the report, click the Print icon in the navigation bar. Or copy and paste the report contents into a spreadsheet application.

## SIS Management Cycle

You and your staff perform and manage many significant PowerSchool Student Information System (SIS) processes throughout each school year. When the school year ends, you run the End of Year process. Next, you prepare for the upcoming school year with the Start of Year process. At the end of a term, you perform the End of Term process to store grades and prepare for the new term. Throughout the school year, you manage regulatory compliance reporting for your district, state, and/or region.

To prepare for the upcoming school year, you build and load a new schedule. At the end of the school year, you may choose to use PowerSchool SIS to manage your summer school data. Finally, you prepare for the End of Year process and begin the cycle again.

Complete these important actions to ensure that your PowerSchool SIS data is in good order. All processes in the SIS management cycle require communication with your district's school leaders and administrators. Once you have agreed upon things like dates, such as the start and end date of each term, and policies, such as which grade scales and final grade calculations to use, create a plan to determine when each management cycle task is to be completed and who is responsible for completing each part of the tasks.

## Regulatory Compliance Preparation

To prepare for regulatory compliance reporting, review the online resources available in the Help menu in PowerSchool SIS. In the header section of the Start Page, click **Help**. Then click **State Reporting Help**. The reporting information for your state or province opens in a separate tab. Review items such as release notes, a list of reports, and setup requirements, in addition to other region-specific information and resources.

Use the guides in the State Reporting Help area to complete all required district- and school-level setup. To ensure that your regional regulatory compliance reports remain up-to-date, click **System > System Settings > Reporting Engine** and check **Enabled** for "Automatic Update of State Reports."

Review student data and course enrollment records to identify any missing or incomplete data to avoid reporting issues. A few fields affect reporting and functions for all students. If the following fields are blank or contain data that was entered incorrectly, invalid values will appear on reports, or students may be missing from reports entirely.

Review the following fields that affect reporting and system functionality. Each field in this list is followed by the field name from the database:

- Date of Birth: DOB
- Full-Time Equivalency: FTEID
- Federal Ethnicity: FedEthnicity
- Reporting Ethnicity: Ethnicity
- Gender: Gender
- State/Province Number: See your region's regulatory compliance reporting guide

Use the search field on the Start Page to identify students with a blank value for any of these key fields. For example, to search for a blank full-time equivalency value, enter **FTEID=** in the search field and click the Search icon.

Follow the same steps for the other key fields, as well as additional fields identified as important for your region. To find other field names in the Students table, click **View Field List** on the Start Page. For fields stored in other tables in the database, search using Direct Database Export (DDE) or your regulatory compliance reporting guides.

## End of Term Process

To prepare for the end of each grading term, administrators need to map out the school year and scheduling terms, define the marking periods, and determine when to store grades.

Scheduling terms, entered on the Years & Terms page, define how long students are enrolled in classes. Final grade or reporting terms, also known as marking periods, define when grades are reported. Enter these terms on the Final Grades/Reporting Term Setup page. Use final grade/reporting terms during the End of Term process to create a schedule for managing your school year.

## Completing the End of Term Process

At the end of each grading term, you will store grades as part of each student's historical grade record. For example, at the end of Quarter 1, store the final grades each student earned in Q1 as historical grades.

For schools using standards-based grades, the grades are stored automatically whenever teachers enter the grades in their gradebooks. For storing traditional final grades, navigate to the Permanently Store Grades page by selecting **System > Permanently Store Grades**.

To help ensure that the grades are accurate, verify that each teacher has entered grades for students. In addition, each teacher should verify that the grades are correct for each student.

During the End of Term process, you not only store each student's final grade permanently for a grading term, but you also award graduation credit.

Prepare to store student grades a week or two before the end of the term. Starting early gives you time to confirm that teachers have entered grades for students and gives teachers time to finalize and verify student grades.

Although many staff members are involved with the End of Term process, one person at each school should coordinate the completion of each step and perform the Permanently Store Grades function. The steps are as follows:

1. Set the final grade deadline
2. Verify that teachers have entered grades
3. Permanently store grades
4. Calculate the honor roll

## The Final Grade Deadline

PowerSchool recommends storing grades within one month of the end of the grading term. So, teachers should finalize student grades soon after the grading period ends. Set and announce a deadline by which teachers must finalize grades. For example, if schools store grades a week after the grading term ends, teachers must finalize student grades a day or two before that date.

Use the daily bulletin to communicate the final grade deadline to staff members. Use the Target Audience option to communicate different messages to different audiences. For example, you can post the announcement for teachers or school administrative users to view, and parents and students won't see it.

One or two administrative staff members should set up and maintain the daily bulletin for your school.

## Creating a New Bulletin Item

1. On the Start Page, click **Special Functions > Daily Bulletin Setup > New**
2. Edit the date range for when you want the item to appear
3. Choose the target audience
4. Enter the sort order number to determine where the item appears in the bulletin; the lower the number, the higher the placement on the page
5. Enter the title of the bulletin
6. In the Item Body field, enter the bulletin content
7. Use the HTML toolbar to format the content, if needed
8. Add pictures, links, and tables as needed
9. Click **Submit**

## Editing or Deleting an Existing Bulletin Item

1. On the Daily Bulletin Setup page, click the date range of the item
2. Edit information in any field
3. Click **Submit** to save your edits, or click **Delete** to delete the item from the bulletin

## Viewing the Daily Bulletin

Teachers view the daily bulletin in PowerTeacher; substitute teachers view it in PowerTeacher Substitute; and parents and students use the PowerSchool SIS Student and Parent Portal pages to view the bulletin. Administrative users click **Daily Bulletin** on the Start Page to see today's bulletin. Also, view the bulletin for other days by clicking the Calendar icon at the bottom of the page.

## Locking Reporting Terms

Once the ability to manage locked reporting terms is added to a user access role, administrators can set up automatic locks to lock down grades and scores a certain number of days after the end of a reporting term. Administrators can also lock or unlock classes until a specified date.



# SIS Management Cycle

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To lock reporting terms at the district level, on the Start Page, click **District** in the main menu. On the District Setup page, click **PowerTeacher Pro Settings**. Click **Lock Reporting Term Settings**. On the Lock Reporting Term Settings page, click the name of the school. Then check **Enable Terms Locks** and enter the number of days after the reporting term that grades will be locked, such as 5. Keep in mind that the term is locked at the beginning of the day. For example, if the reporting term ends on June 10 and you enter 5 to lock the reporting term 5 days later, the lock will be engaged at the beginning of the day on June 15. If you leave this field blank, the Lock Reporting Term feature is disabled. Next, enter the number of days to warn teachers before the term is locked, such as 10. When enabled, a banner message will appear in PowerTeacher Pro informing teachers of the impending lock date. To copy the settings to other schools, check **Copy Settings** and then clear the box next to **School Name**. Check the boxes next to the names of the schools to which you want to copy the settings and click **Submit**. Settings can also be added at the school level by clicking **School > PowerTeacher Pro Settings > Lock Reporting Term Settings**.

Once a reporting term is locked, teachers will not be able to change final grades, assignment scores, or assignments that have been scored. Additionally, if they recalculate final grades, grades in any locked terms will not be recalculated.

When reporting terms are locked, teachers will see warning messages at the top of PowerTeacher Pro and Unified Classroom Grading pages, such as the Assignments and Scoresheet pages.

- Before the reporting term is locked, teachers will see a warning message indicating when the reporting term will be locked

For example, they may see a message that says the reporting term will be locked in five days. Teachers will need to complete final grades before the end of the lock date.

- Once a reporting term has been locked, teachers will see a message indicating that the term is locked

If teachers attempt to score an assignment or a standard aligned to an assignment that has a due date in a locked term, they will also see a message in the Score Inspector indicating that the score is locked.

What if a teacher needs to correct a final grade after a term is locked? Or needs to change assignment scores or final grades after a reporting term has been locked? Occasionally, you may have to unlock a reporting term to allow a teacher to make corrections to final grades. Use the Teacher Schedules page in PowerSchool SIS to manually unlock and lock a reporting term.

To unlock the reporting term manually so that the teacher can make the change:

1. On the Start Page, click **Teacher Schedules**
2. Select the teacher
3. On the Teacher Schedule page, check the box next to the class you want to unlock
4. Then click the arrow next to "Unlock Selected Sections" to open the Lock Reporting Terms menu and choose **Unlock Selected Sections**
5. In the Unlock Until window, enter the date that the term will be unlocked until, such as tomorrow's date

## 6. Click **Submit**

To clear the manual lock/unlock settings, click the arrow to open the Lock Reporting Terms menu and choose **Clear Manual Lock/Unlock**. To lock a reporting term manually, follow the same steps, but choose the "Lock Selected Sections" option.

## Checking for Grades

After you announce the final grade deadline to teachers, use the Student Schedule Listing report to find teachers who have not entered grades for the current term. Once identified, these teachers may require special reminders, assistance, or follow-up training to meet the final grade deadline.

Using the Student Schedule Listing report, look through the students' schedules for classes that have an underscore (\_) listed in place of a grade. These teachers have not entered any assignment information for the courses listed. Use the report to note the names of the teachers who need follow-up attention before the final grade deadline.

A day or two before the store grade deadline, run the Student Schedule Listing report again and verify that those teachers who had not entered grades previously have now done so. Ignore courses in which students do not receive a grade, such as Work Release.

As an alternative to the Student Schedule Listing report, run the Teacher Gradebooks report to verify whether teachers have entered grades. This report is a snapshot of all of your teachers' gradebook Scoresheets.

## Determine Teacher Readiness

The Section Readiness page is designed to assist or replace the process of printing and collecting a final grade verification sheet. Use the Section Readiness page to determine if teachers have completed their grades for each of their classes. Once they have finished entering grades, they can notify you electronically.

### Review Section Readiness

For each section they teach, teachers either mark final grades as complete or enter comments indicating the status of their grades in PowerTeacher Pro and Unified Classroom. PowerSchool SIS administrators can view the statuses and comments on the Section Readiness page in PowerSchool SIS.

To view the Section Readiness page, click **School** from the Setup section of the main menu. In the Grading section, click **PowerTeacher Pro Settings**. In the Completed Grades area, click **Section Readiness**.

By default, the Section Readiness page shows every section for the selected school and term, and includes some basic information for each section, such as the teacher name, course number, and section number. The Verified Status column indicates whether the teacher has completed his or her final grades, and the Verified Date column will display the date the teacher completed the grades. Teachers may include written notes that will appear in the Teacher Status Comment column.

Use the filter area at the top of the Section Readiness page to narrow the list of sections displayed below. Select a reporting term, such as **Q1**, and a verification status, such as **Completed**, then click **Apply** to show a list of sections for which the teacher has completed all of the final grades. To add another filter, click the **+** sign to the right of the filter menus. Select a category from the menu, such as **Course Name**, and enter the search criteria in the field, such as **Algebra**. Click **Apply** to see the updated list of sections.

Follow these steps to view the Section Readiness page in PowerSchool SIS to find out which teachers have not yet completed final grades for the term:

1. In the main menu on the school Start Page, click **School**
2. Under Grading, click **PowerTeacher Pro Settings**
3. Under Completed Grades, click **Section Readiness**

The Section Readiness page displays a list of teachers, their courses, and final grade verification statuses.

4. To filter the list by reporting term, open the Reporting Term menu in the filter area at the top of the page and select the term, such as **S2**
5. To see which sections are not complete, open the Verified Status menu in the filter area and select **Not Complete**
6. Click **Apply**
7. Use the navigation features at the bottom of the page to scroll through the results
8. To narrow the list of results to a single teacher, click the **+** sign to add a filter option
9. Open the additional filter menu and select **Teacher Name**
10. Enter the teacher's name, such as **Abram**, in the filter field
11. Click **Apply**

## Storing Grades and Honor Roll

Store grades using the steps previously covered in the Managing Grades and Academic Data section of this document. Remember, until grades are stored, you are reporting progress grades. For schools using standards-based grades, the grades are stored automatically whenever teachers enter the grades in their gradebooks. For storing traditional final grades, navigate to the Permanently Store Grades page by selecting **System > Permanently Store Grades**. Your first storing grades task is to select the correct term from the Final Grade/Reporting Term menu. These terms are the same as the terms used in the teachers' gradebooks and are found on the Final Grade/Reporting Term Setup page. Next, enter the correct store code. Store codes are usually the same as the final grade term.

Next, your school administrators need to decide which method to use to store enrollment and grade information.

The first storing method is the Exclusion method. Choose from two ways to exclude enrollments. The first way excludes enrollments for students who enrolled in a course after a specified date. The second way excludes enrollments for students who dropped a course before a specified date. Choose one or both of the options.

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The Inclusion method of storing grades includes only enrollments that are both currently active and were active on a specified date during the grading term. For example, suppose the last date that students could enroll in a class and still get credit for it was November 24th. When grades are stored, only currently active students who were enrolled on or before November 24th would be included. So students who enrolled before November 24th would get credit for the course, and students who dropped the course after November 24th would also get credit. Students who dropped late will still get credit for the course that they've been in for most of the marking period. This method is commonly used in elementary schools.

If you need to store final grades for a specific group of students (such as the early graduates who need final transcripts before the school year ends), you can store grades for your current student selection, a course section, a grade level, a course track, or students whose school exit date falls within a specific date range using the additional filter options.

Depending on your district or school policies, you must decide how much credit for each class will be stored at the end of the term. (The classes are divided and identified by their term length on the Permanently Store Grades page.) For example, what percent of a yearlong course will you store? Will you store semester courses, or will you store quarters only? These terms are set up on the Years & Terms page and may not include all of the Final Grade/Reporting Term options.

**Which Grades**

Use this Final Grade/Reporting Term: S2 ▼ \*

Save with this Historical Store Code: S2 \*

**Exclude/Include Class Enrollments**

Exclude enrollment records where the student enrolled in the class after this date: 7/12/2019 📅

Exclude enrollment records where the student dropped the class before this date: 2/11/2019 📅

Include only enrollment records that are currently active and that were active on this date: 00/00/0000 📅

**Additional Filter Options**

Classes by term length	Store	% of course credit
2018-2019 (07/30/2018 - 07/26/2019)	Store with credit <span style="border: 1px solid #ccc; padding: 2px;">↕</span>	50 %
Semester 1 (07/30/2018 - 01/27/2019)	Do not store <span style="border: 1px solid #ccc; padding: 2px;">↕</span>	%
Semester 2 (01/28/2019 - 07/26/2019)	Store with credit <span style="border: 1px solid #ccc; padding: 2px;">↕</span>	100 %

If you are storing grades for a term that is not in progress or has only recently passed, you may need to display all terms. If a term was already stored, you will overwrite the grades for that term and may affect graduation credit, GPAs, and transcripts.

Show all terms?  No  Yes

**Options for classes enrolled at other schools**

Store grades for classes enrolled at All schools ↕

Record the school name of This school ↕

Some students take courses at other schools in the district. You need to decide which of these course enrollments and grades will be stored.

Additionally, course credit may be affected by attendance. You must determine whether you need to withhold credit according to school or district policies.

Select additional filter options based on your requirements.

You should store grades at the end of every marking period, even if you don't award credit at the end of every marking period or do not display each marking period on student transcripts. Storing grades ensures that you will have a record of each official report card issued by the school. Therefore, after some marking periods, you may have to store grades more than once.

After storing grades, your system administrator must update the source of data to historical data on the Quick Lookup Preferences page to ensure that the grades on transcripts and report cards are the same as what staff and teachers view on the Quick Lookup page and the same as what students and parents view in PowerSchool SIS Student and Parent Portals and PowerSchool Mobile.

## Honor Roll

For schools that recognize student academic achievements, the calculation of honor roll is the next step in the End of Term process. Calculation of honor roll is not automatic. You must run this process after you store grades. Honor roll is based and calculated on the stored grades for each student.

Before calculating honor roll, check the honor roll methods. Honor roll methods are created and found at the school level by going to **School > Honor Roll > New**. Once you verify the method is correct, return to the Honor Roll Method page to verify the levels. Honor roll methods are divided into levels of criteria. You define each level by setting the criteria that students must meet to achieve that level. Check the GPA requirements, credit requirements (optional), and grade requirements. Grade requirements specify which grades the students must or must not have in order to meet the requirement. Remember to include the + and - grades, if your school uses them. Make sure you set the evaluation order properly. PowerSchool SIS evaluates students against the highest honor roll level first, so you must set the highest level as level one. Students must meet all of the criteria you specify to receive that honor level. If they don't meet the criteria, PowerSchool SIS evaluates the students for the next level, and so on.

Once you determine that all honor roll methods are correct, select the desired students, then navigate to the System page and click **Calculate Honor Roll**. Define which store code to associate with this honor roll, and which honor roll method you wish to calculate.

View the results of the honor roll calculation by running the Honor Roll report, located on the System Reports page. For the final step of the End of Term process, create transcripts and print report cards.

## Scheduling Preparation

PowerSchool SIS has five scheduling tools to choose from:

- PowerScheduler
- Filter Classes

- Automated Schedule
- Manually Schedule Student
- Mass Enroll and Drop

In this section, learn the basics about each tool.

## Using PowerScheduler

Before getting started on next year's schedule, first decide whether you are going to build a new master schedule or copy a master schedule from a previous school year. PowerSchool's scheduling engine, PowerScheduler, which includes the Visual Scheduler tool, helps make the process more streamlined and successful. PowerScheduler is not a scheduling option for a new student after the start of the school year.

Some schools will use PowerScheduler to build a new master schedule from scratch and load students into the new schedule. In a "build and load" scenario, the computer uses an algorithm to help you determine how many sections are required and how to organize them, based on student scheduling requests.

Some schools will use PowerScheduler to copy a previous master schedule, make manual changes for the new year, then load students into that schedule. In a "load only," you make the master schedule changes manually.

Following is a list of the phases of a build and load in PowerScheduler:

### Phase 1: Collect and Enter Data

1. Create the scenario and course catalog
2. Enter student requests and review the tally numbers
3. Complete the Course Preferences page (for example, the PPM, Freq, Terms, Max, Periods, and Load Priority fields)
4. Complete the room setups and facilities, if used
5. Complete the Teacher Preferences page
6. Enter teacher assignments based on the Course Request Tally results
7. Enter course relationships (for example, the Blocking or Prereq fields)
8. Enter constraints (for example, the Pre-Schedule, Teacher Free, Course Team, or Teacher Team options)
9. Print pre-built reports to check data
10. Install the PowerScheduler engine

### Phase 2: Validate, Build the Master Schedule, and Load Students

1. Run the validation function
2. Correct errors
3. When errors are corrected, run the Course Rank (Build Rank) function
4. Build - Click **Q** to review results
5. Load - Click **Q** to review results

6. Evaluate the results of the build and load process and repeat phase 2 as often as needed

Update the course rank if the course setups change.

## **Phase 3: Revise the Master Schedule Manually; Continue to Load**

1. Build complete
2. Take control of the master schedule (modify the sections)
3. Create section links (constraints) where you want to link sections
4. Load
5. Import
6. Evaluate the results and repeat phase 3 as often as needed

## **Phase 4: Fix Incomplete or Incorrect Student Schedules Manually**

1. Build and load complete
2. Manually adjust schedules that are incomplete or incorrect

## **Phase 5: Commit Schedules to the Live Side**

1. Verify that term dates are correct
2. Commit schedules to the live side at each school before promotion/rollover
3. Use Automated Walk-in Scheduler on the live side to enroll late registrants

To completely understand PowerScheduler, it is recommended that you take separate instructor-led or PD+ training on the topic.

## **Filter Classes**

The simplest method to create or change a student's schedule is to navigate to the Modify Schedule student page to begin scheduling a single student. Find available courses by using the filtering options in the Filter By area of the Available Courses page. Use the menus to filter courses by period, term, teacher, day, grade level, or credit type. Then click the link for the course name to add the class. If you click a link for a course that shows enrollment numbers in red, the class is full, and you must enter a password to override the maximum enrollment for the course.

How you filter courses depends on how your schedule is set up. High school and middle school staff members filter courses by period to create a student's schedule. If the school has six periods, the staff member will filter courses six times (once for each period) to build the student's schedule. Elementary staff using dependent sections will filter classes once only. When you enroll students into one section that has dependencies (usually the Homeroom section), the system enrolls the students into the dependent sections automatically. For example, when you enroll a new student into Homeroom, the system will enroll the student into the dependent Math, English, Science, and Social Studies sections all at once.

Follow these steps to enroll an elementary student into a homeroom class that has dependent sections:

1. Search for and select the student

2. Click **Modify Schedule**
3. From the Period menu under Search Available Classes, choose the period used for your homeroom classes
4. Click **Find**
5. Modify the Enroll date field to the date the student will start class
6. Click a homeroom course name to add the class to the schedule

The student's complete schedule will appear. Notice that the student's schedule lists a homeroom section as well as the dependent sections.

## Automated Scheduling

Automated scheduling is course specific (not section specific as with filtering) and most often used in secondary schools. While you'll have to perform a few more steps than you do when filtering only, you'll receive a completed schedule after just one click rather than having to add one class at a time. Enter a student's requests for specific courses, and the system will schedule the student in the sections that best fit his or her schedule automatically. However, you must have completed the scheduling setup and have the PowerScheduler engine, which is a set of files required for running the automated scheduling function, installed and running on your server to use the Automated Schedule function.

Edit or enter course requests for the student on the Modify Schedule – Requests page. The scheduling engine uses requests to build the student's schedule. The engine will not schedule the student into a course that he or she did not request. Locked enrollments are the exception to the automated process; locked enrollments are kept, even if a request does not exist for the course.

## Manual Scheduling

To schedule a student manually, pick specific sections in which to enroll the student, and choose whether or not to override the system-defined schedule, if one exists. The Manually Schedule Student page displays requests and current enrollments and shows when other sections of requested courses are offered. View the Manually Schedule Student page to verify enrollments and course requests for new and currently enrolled students. The page displays no enrollment information until you enter a request or a schedule.

The student's current classes appear as gray-checked blocks, available classes are green, and full classes are red with an asterisk.

To enroll a student into a full class, enter the password to override the maximum enrollment. The PowerSchool SIS administrator sets up the password at the district level.

Follow these steps to enroll a student into classes:

1. Search for and select a student
2. On the student pages menu, click **Modify Schedule**
3. At the top of the Modify Schedule page, click the Requests tab
4. Click **New > View Courses**
5. Press and hold the Control key on a PC, or the Command key on a Mac, and select eight classes



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## 6. Click **Okay** > **Submit**

Notice that the classes you selected appear on the page.

## 7. Click the Enrollments tab, then click **Manually Schedule Student**


8. Check the check box for each period of the classes that will complete the schedule

9. Click **Submit** > **Modify Schedule** to view the new schedule

Also, under the Scheduling section, click **Matrix View** to view the schedule and spot missing classes quickly.

## Manually Schedule Student 📄 💰

Christensen, Lacy F 10 701 AGHS1

Enroll date:  

Number	Course Name	Term	Day	Period			
				1	2	3	4
ART1000	Intro to Art	S1	A		<input type="checkbox"/>		
			B			<input type="checkbox"/>	
		S2	A		<input checked="" type="checkbox"/>		
			B	<input type="checkbox"/>	<input type="checkbox"/>		
CS1000	Keyboarding	S1	A	<input checked="" type="checkbox"/>			
			B			<input type="checkbox"/>	
		S2	A	<input type="checkbox"/>			
			B		<input type="checkbox"/>		
CUL001	Culinary Arts	S1	A			<input type="checkbox"/>	
			B				
ENG1000	English 1	18-19	A		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
			B	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ENG2200	Technical English	18-19	A	<input type="checkbox"/>		<input type="checkbox"/>	
			B			<input type="checkbox"/>	
HE10	Health 10	S1	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
			B				
		S2	A		<input type="checkbox"/>		
			B			<input type="checkbox"/>	

## Mass Enroll

Enrolling a group of students into a specific class simplifies scheduling. Elementary schools often use the mass enroll method to schedule a group quickly into the same class. To mass enroll a group of students into a class, first select the group of students, then select **Mass Enroll** from the Group Functions page or select **Mass Enroll** from the group functions menu.

## Drop a Class

Adding classes to a student's schedule is just one part of the scheduling process. Dropping classes is another part. You have two options to drop a class from a student's schedule.

On the student's Modify Schedule page, select **Drop** next to the section enrollment(s) to drop classes individually. Then, click **Drop Selected** (when dropping just a few classes), or **Drop All** (when dropping all classes). Finally, verify the date the student is leaving the class or classes. The exit date is extremely important; it should always be the day after the last day the student attended class. Then click **Drop Classes**.

The other option you have is to drop multiple students from a class at once. For example, new student enrollments can affect the number of sections you need to offer for required courses. If you didn't plan for those new students, you may need to create a new section. To balance out the sections, drop some students from one section, then enroll them into the new section. Perform all of these functions by navigating to the Teacher Schedules page, selecting a teacher, and clicking an enrollment number.

## Student Pre-registration

Once the upcoming school year has been created on the Years & Terms page at each of your schools, pre-register students new to your district for the upcoming school year. Correctly pre-registering students will create a student record with an enroll status of -1 and "Pre-registered" will appear next to the student's name on all student pages. It also creates a pending enrollment that will become active during the nightly process at 12:00 AM based on the date entered in the Enrollment date field on the Enroll New Student page.

To pre-register a student for the upcoming school year, follow these steps:

1. On the Start Page, open the School menu and select the school the student will be enrolled in next year
2. Open the Term menu and change the term at the top of the page to the year term for the upcoming school year
3. From the main menu, click **Enroll New Student**
4. Populate the fields and enter the first day of the upcoming school year in the "Enrollment date" field
5. In the Grade Level field, select the grade the student will be in for the upcoming school year
6. Click **Submit**

## Summer School and Remote Enrollments

Previously, administrators managed summer schools by moving students from their home schools to summer schools and then moving them back after summer school ended. With the summer school and remote student processes, dual enrollment is supported so you don't need to transfer students out of their home schools. End-of-Year processing is not affected and there is a separate end-of-summer-school process, so enrolling students into summer school classes or classes at another school is much easier.

You may need to place a student in a summer school class or a class that is not taught at your resident school. For example, Geometry is taught at only the high school, but one of your 8th graders needs to take that class. You can schedule the student in that class using the "Enroll Student in Remote/Summer School Class" function located on the student's Functions student page. Only staff at the school where the student is currently enrolled can perform this function.

## Enroll in Remote Schools and Summer Schools

To enroll the student in the class, instead of entering the exact course and section number to enroll a student in summer school, filter for summer schools, view available courses, sections, and seats, then choose a section from the list.

To enroll a student in a class at a remote or summer school:

1. On the Start Page, find and select a student
2. Under Enrollment on the list of student pages on the left, click **Functions**
3. On the Functions page, click **Enroll Student in Remote/Summer School Class**
4. To view classes at only summer schools, check **Show Summer Schools Only**
5. Open the "School Where Class is Held" menu and choose a school
6. In the Course field, begin entering a course name to view an auto-fill list of available courses, such as **MAT**
7. Select a course to view a table of available section numbers with each section's teacher name, number of students enrolled, max enrollment, and expression (period and day)
8. Select a section for the student

If a section is full but you have authority to override maximum capacity, you can choose the section, enter the override password, and click **Submit**.

9. For summer schools, additional enrollment fields appear:

Use the Grade menu to choose the appropriate grade level for the student

Use the FTE menu to choose the full-time equivalency value for the student or use the preset value if the student has a reenrollment record for the current term

From the Entry Code menu, choose an appropriate value for the student

10. The default enrollment date is the current date but you can enter a different enrollment date if you need to back-date or future-date enrollment

For example, enter the first day that the student will attend the summer school class.

11. To enroll the student, click **Submit**

## Mass Enrolling Students in Remote and Summer Schools

Similar to the process for enrolling an individual student in a remote or summer school class, you can mass enroll a group of students in a class at a remote or summer school. Select a group of students and then use a group function to mass enroll the group into a remote or summer school class.

1. On the Start Page, select a group of students
2. Open the Select Function menu and choose **Mass Remote/Summer School Enrollment**

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3. To view classes at only summer schools, check **Show Summer Schools Only**
4. Open the "School Where Class is Held" menu and choose a school
5. In the Course field, begin entering a course name to view an autofill list of available courses, such as **MAT**
6. Select a course to view a table of available section numbers with each section's teacher name, number of students enrolled, max enrollment, and expression (period and day)
7. Select a section for the group of students

If a section is full but you have authority to override maximum capacity, you can choose the section, enter the override password, and click **Submit**.

8. For summer schools, additional enrollment fields appear:

Use the Grade menu to choose the appropriate grade level for the students

Use the FTE menu to choose the FTE value for the students or use the preset value if the students have reenrollment records for the current term

From the Entry Code menu, choose an appropriate value for the students

9. The default enrollment date is the current date, but you can enter a different enrollment date if you need to back-date or future-date enrollment

For example, enter the first day that the students will attend the summer school class.

10. To enroll the group of students, click **Submit**

## Search for Remote Students

When searching for students, include students who are enrolled in a school as remote or summer school students by checking **Include Remote Enrollments** on the Start Page and clicking the Search icon. Without this search option, you would need to search for enrolled students from other schools by using the search code `*secondarystudents=all` and adding them to your currently selected students.

When your currently selected school is a summer school, student search results will include students who have their summer school indicators set to that school, regardless of whether "Include Remote Enrollments" is checked or not.

## End of Year Process

Complete the End of Year (EOY) process for all schools in the district in a single process once per year at the district level. Communicate with your district's school leaders and administrators before beginning the EOY process to ensure that all schools have completed preparations. If you enroll students directly into summer school(s) that use PowerSchool SIS, complete summer school before conducting the EOY process.

The EOY process creates new school enrollments for students at their appropriate schools, grade levels, and full-time equivalencies (FTE) for the coming school year. Students are promoted, retained, or demoted based on the values in the Next Grade Level field, and may be transferred to another school within the district based on the values in the Next School Indicator field.

The EOY process also moves data to the new school year, including student and staff demographics and many district and school settings, such as attendance codes. You can either roll over fee transaction balances, or you can update all balances to zero.

## End of Year Preparation

Preparation for the EOY process includes verifying terms and FTEs at each school, locating and correcting invalid data, running reports that are unavailable after EOY, and assigning a "next school" and "next grade level" to each student.

Make sure to perform the following tasks to prepare for EOY:

- Store final grades
- Run final GPA, Class Ranking, and Honor Roll reports
- Print final report cards and transcripts
- Run regulatory compliance reports
- Validate and clear temporary data
- Add the year term
- Make courses available
- Check default grade levels for FTEs

## Prepare Student Records

Student records hold a lot of data, but most of the data falls under two categories: demographic and enrollment. Most of this data is carried forward or updated for the next year during the EOY process.

Two student fields are vital to the EOY process. These fields determine the schools and grade levels that students are promoted to. In fact, if these values are undefined for any students on the server, the EOY process will not be completed. The two fields that are vital to the EOY process are:

- Sched\_NextYearGrade (Next Year Grade)
- Next\_School (Next School Indicator)

If you use PowerScheduler to create your schedule, click **PowerScheduler > Students > (select a student) > Preference > (Student name)** to define these values. Otherwise, select a student from the PowerSchool SIS Start Page and navigate to the student's Scheduling Setup page.

As part of the EOY process, the values for Sched\_NextYearGrade and Next\_School are updated for the following year's end. For example, if a 9th-grade student is promoted to 10th grade, then after EOY, her Sched\_NextYearGrade field is updated to 11.

The EOY process uses the highest grade level defined for your district to determine when students are ready to leave the district. For example, the highest grade level for any school in your district may be 12. When the EOY process promotes students currently in 11th grade, it sets their next grades to 99 and their next schools to 999999. At the end of the year, EOY recognizes the 99 and 999999 values and moves the students to the Graduated Students school.

To find students without data in these fields, on the Start Page, search `Next_School1=` and `Sched_NextYearGrade=`. Add entering next school, year of graduation, and next school indicator information to your enrollment process to avoid blank fields at the end of the year.

## Retain or Demote Students

Correct the next year grade and next school indicators on the Scheduling Setup page for students you retain or demote to ensure that running the EOY process keeps students in the proper grade level and school. If you change a student's grade level during the year, adjust the next grade and next school indicator as well.

## Initiate End of Year

Before running the EOY process, run a manual backup, or mark the time so that, if necessary, you can return your data to that point in time. Importing your manual backup is the only way you can undo EOY; it is otherwise an irreversible process.

The EOY process determines how students are promoted based on their next school and next grade level values. When running EOY, you will select an exit code, entry code, and exit comment for each type of student promotion. Select a fee transfer option to define how PowerSchool SIS will manage outstanding balances during the EOY process.

### Exit Codes

Select an exit code for each way a student will transition at the end of the year: graduation, promotion to the next school, promotion within the same school, retention, or demotion. During the EOY process, the system will assign an exit code to each student's current enrollment based on a comparison of each student's next school indicator, current school, next grade level, and current grade level.

### Entry Codes

Select an entry code for each way a student enters a school year: promoted to the next school, promoted within the same school, retained, or demoted. The EOY process will assign an entry code to each student's new or upcoming enrollment based on a comparison of each student's next school indicator, current school, next grade level, and current grade level.

### Exit Comments

Select an exit comment for each way a student will transition at the end of the year: graduation, promotion to the next school, promotion within the same school, retention, or demotion. The EOY process will assign an exit comment to each student's current enrollment based on a comparison of each student's next school indicator, current school, next grade level, and current grade level.

## Fee Transfer Methods

Select a fee transfer method. If you select "Roll over the current balance," any student with a balance other than 0 (zero) for the current school year will be given a Start of Year (SOY) balance on their fee transactions for the upcoming school year. If you select "Zero the current balance," students will start the upcoming school year with a zero balance for fee transactions. However, this does not affect student lunch balances.

## Validation

The EOY process includes a validation mode during which the system will evaluate student, school, and district information to determine end-of-year readiness. The EOY process will not run unless all students and schools are properly configured in terms of transfers to the next school year. To make sure that your data is prepared correctly for EOY, initiate the process by selecting **Perform EOY Validation** or **Perform EOY Validation and make any student with issues the current selection**. When you select either of these options, PowerSchool SIS prepares to run the EOY process and displays any errors, but it won't run the process. If any of the prerequisites are not met, an alert appears that summarizes the errors.

## Errors

As the EOY validation process runs, various student-related or school-related errors may appear on the results screen. It's important to review and correct these errors or the EOY process will not run successfully. Repeat the validation process after correcting student setup or school setup data errors and then verify that there are no other errors.

Remember to verify readiness and clear all errors related to running the EOY process as often as you need to. While verifying readiness, do *not* choose "Perform EOY and Promote Students" from the menu at the bottom of the page.

## Run EOY

After you have met all the prerequisites and eliminated all of the errors identified during the validation, run a manual backup of your data and verify that the exit codes, entry codes, exit comments, and fee transfer methods are set as they were before running the validation process.

Initiate the EOY process by selecting **Perform EOY and Promote Students** and clicking **Perform End-of-Year Processing**. A message appears, indicating that EOY is in progress. After the process is complete, verify that the new data is correct. For example, switch your school term to the upcoming school year and verify that the current 11th-grade students were promoted to the 12th grade. Make another backup at this point.

## Start of Year Process

To ensure a successful beginning to the school year, it is recommended that you check your PowerSchool SIS data for accuracy at both the district and school level. Create a timeline for completing all tasks and determine who will complete each task at each school. Before you complete district- and school-level setup, complete the following tasks to prepare for the new school year:

- Involve the right people, such as district and system administrators

# SIS Management Cycle

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- Review the course catalog and the student handbook for course and policy changes that may impact your data needs
- Consider the impact of systemic or policy changes for next year, such as a change to GPAs (grade point averages)
- Check any graduation requirements that might be changing
- Review all security groups, user roles, and staff security settings
- Verify term IDs and term dates for the upcoming school year
- Use the Start of Year checklist as a project plan

Before you begin performing SOY tasks, it's best practice to create a backup of your PowerSchool SIS data. Ensure that your backup plan includes removing copies of the backups from the server for storage in another secure location.

## District Setup

Settings configured at the district level affect all schools on the server. Most district and school settings are copied from year to year, so updates are usually required only if there is a change in district policy or in a region's regulatory compliance reporting requirements. Many district settings affect data entry for students, such as exit codes for students' school enrollments, incident management codes for students' disciplinary records, and test categories for students' standardized tests. Verify that the district settings for various codes and categories are still valid for the new school year.

Switch to the District Office and click **District** on the Start Page. In the Calendar, Enrollment, and Grading sections, verify the settings for each page. For example, you may need to add a requirement to a graduation plan or to remove a calendar membership type that is no longer applicable. Many of these values affect reporting, so review documentation for your region's regulatory compliance reporting before the start of the school year to see if updates are required.

Also, remember that you'll access information related to each school in the district from the Schools/School Info link on the District Setup page. The school record contains information specific to each school, including the school address, grade levels taught at that school, and school fees. Update this information if changes have occurred, such as the hiring of a new principal or the addition of new enrollment fees.

## Code Sets

District-level administrators can create and manage their own code sets and code values in PowerSchool SIS. For example, you can add more genders and student contact relationship types. You can also create new code sets for customer-created fields for use on custom pages.

### Using the Code Sets Editor

Use the Code Sets Editor to view, create, edit, and delete codes and code sets for use throughout PowerSchool SIS. Code sets appear throughout PowerSchool SIS as menus, and their respective codes appear as menu options. A benefit of using code sets is that they can help you to ensure data validation for regulatory compliance reporting. To access the Code Sets Editor from the District Start Page, click **District > Code Sets**. The Code Sets page includes several pre-populated code sets. To learn more about the default code sets, refer to article ID 80082 at <https://support.powerschool.com/article/80082>.



The following codes sets are listed on the Code Sets page:

- Address
- Country
- Email
- Gender
- Phone
- Prefix
- Relationship
- State
- Suffix

To view a code set, select the code set you want to view from the Code Set menu. The page will display the codes from the selected code set. Use the arrow icons in the Order column to sort the order in which the codes appear in menus. To edit a code, click the Edit icon located to the right of the code.

Make a code active or inactive based on a date range that you provide. To view any past and future codes, select **Show All**, located to the left of the Add Code button.

## Creating or Deleting a Code Set

To create your own code set with custom codes, click **Add Code Set**. Next, enter a relevant name for the code set. Note that you can delete any code sets that you create; however, you cannot delete any code sets included by default in PowerSchool SIS.

To delete a code set on the Code Sets page that you no longer need, first select the code set from the Code Sets menu. Click **Delete** and then click **Delete** again to confirm. Additionally, in order to delete code sets that contain one or more codes, you must first delete the codes before you can delete the code set.

## Importing and Exporting Code Sets

Import and export code sets using the Data Import Manager and the Data Export Manager respectively.

## Adding a Code to a Code Set

The following table lists the various options available to you when adding a new code to a code set. Based on the purpose of your code, you may not need to complete every field to create your code.

# SIS Management Cycle

Field	Description
Code	Enter the value of the code name as you want it to appear in menus, such as <b>CA</b> . This value must be unique.
Display Value	Enter the value as you want it to appear in menus, such as <b>California</b> . If you do not enter a value, the menus will use the code name.
Description	Enter the purpose of the code, such as <b>State Code</b> .
Reported Value	Enter the primary value as you want it to appear in state/provincial reporting documents.
Alt Value 1	Enter the primary alternate value as you want it to appear in state/provincial reporting documents.
Alt Value 2	Enter the secondary alternate value as you want it to appear in state/provincial reporting documents.
Exclude from State Reporting	Leave the check box blank to include this value in state/provincial reporting documents, or select the check box to exclude this value from state/provincial reporting documents.
Start Date	Enter the date the code becomes valid. If the code start date is in the future, it will display "Not yet available."
End Date	Enter the date the code becomes invalid. Code end dates prior to the currently selected term dates display "Expired."
Parent Code Set	Enter the parent code set, if any. Only those codes that are active and do not have a parent code appear as menu options, with the exception the State code set and codes. Only by using custom content can you add a new code that has a parent code to a page.

## School Setup

At the school level, verify that the settings are up-to-date for each of the links on the School Setup page. For example, update the Mobile Settings page to determine who can view PowerSchool SIS on mobile devices, or update the Sub Sign In Settings page to change the default sign-in password for substitute teachers for the new school year.

On the Miscellaneous page, set the default term level users see when they sign in to PowerSchool SIS. Also on this page, determine whether parents and students can view the daily bulletin from the PowerSchool SIS Student and Parent Portals. Note that you set up the school bulletin at the school level, but not from the School Setup page.

To create a new school bulletin item, click **Special Functions > Daily Bulletin Setup**.

While users at every school won't need to check every link, the following is a list of common school settings on the School Setup page to verify:

- Activities
- Fee Types
- Graduation Planner

- Default Term Level
- Mobile Settings
- Substitute Sign In Password
- Years & Terms

## Schedule Structure

To verify the structure of the school schedule, navigate to **School > Years & Terms** and click the name of the full-year term. Review the start and end dates and the number of periods and days. Since the terms, periods, and days must be created before you begin working on the master schedule, most likely you don't need to change the values.

On the Years & Terms page, click **Edit Terms** and review the dates for the terms as well, such as semesters and quarters. Also, verify that the terms were created in the correct order: longest to shortest and earliest to latest. If the terms are out of order—for example, if Semester 2 appears before Semester 1—then the IDs for these terms will be incorrect in the database. Contact technical support staff for assistance with fixing term IDs.

If you need to change term dates before school begins, you'll have to mass-update school and course enrollments scheduled for those terms, which requires the use of Direct Database Access (DDA). Instructions for mass-updating school and course enrollments can be found on PowerSource. Avoid changing term dates after the start of school, since the change will affect attendance, grading periods, and enrollments. Sometimes it is necessary to add days to the end of the school year to make up for snow days or other occurrences. In such cases, update dates on the Years & Terms page, the Final Grade/Reporting Term Setup page, and students' school and section enrollments to reflect the new dates.

## Grading Settings

GPA calculations are significant because they affect other areas of PowerSchool SIS, including reports, honor roll, and class rank. On the District Setup page, click **GPA Calculations > Calculation Methods** and select a calculation method. Calculation methods are copied from year to year, like most of the scheduling and attendance settings. However, if a value is entered in the "School years" field, determine if you need to update that value. The value in the "School years" field limits the grades in the calculation to those received during the specified year or years. You may also need to update terms, grade levels, and/or credit types based on other changes to your setup.

Another grading setting at the district level that you might check is grade scales. If a grade scale is going to change for any of the schools, then use the Grade Scales page to make the appropriate changes.

Update traditional grade calculations by navigating to the School Setup page, clicking **PowerTeacher Pro Settings > Traditional Grade Calculation Formulas**, and selecting the school formula. For example, if your schools use category weighting and they want to add a new assignment category to the calculation, these settings will need to be updated before school starts. Also, on the PowerTeacher Pro Settings page, click **Grade Setup Preferences** to modify the traditional or standards grades preferences, such as enabling teachers to edit grade calculations.

## School Grading Settings

Review the terms set up on the Final Grade/Reporting Term Setup and Current Grade Display pages to ensure that section enrollments are accurate and that grades appear on the Quick Lookup page.

### Final Grade/Reporting Term Setup

Review each school's final grade setup by navigating to the School Setup page from the Start Page. Then click **Final Grade/Reporting Term Setup**.

Set up final grade reporting terms for each school. Final grades define the length of each grading period for a particular scheduling term. The start date and end date of a grading term determine which gradebook scores (such as assignments, tests, and projects) are included in a particular final grade. When you set up final grades for a term, you affect only the courses that belong to that term. Be sure to work with your administrators to set final grade deadlines once final grade setup is complete.

Select a term name to check the term's starting and ending dates. Click **NEW** to add additional terms. For example, if the yearlong term and semester terms are defined, but you need quarter-long grading periods, add those quarter terms.

### Quick Lookup Preferences and Current Grade Display

To display final grades and citizenship codes on the student Quick Lookup page, click **School Setup** and then, in the General section, click **Quick Lookup Preferences**. The terms that you set up for the school on the Final Grade/Reporting Term Setup page are the same terms that are available on the Quick Lookup Preferences page.

Select which terms to show in PowerSchool SIS, PowerTeacher, and the PowerSchool SIS Student and Parent Portals. The source of data on this page is important because it designates the origin of students' final grades. If the source of data is set to Gradebook, then all final grade information will come from PowerTeacher Pro. If the source of data is set to Historical, then all information will come from records in the StoredGrades table.

You must update the source of data after grades are stored to ensure that there is never a discrepancy between student report cards, the information shown on the Quick Lookup page, and the information shown in the PowerSchool SIS Student and Parent Portals. Keep in mind that stored grades do not change, even if teachers update their gradebooks.

On the Current Grade Display page, you will find one setting for configuring which term is the active term. Use this page to set the term that is used to calculate a student's GPA on the Quick Lookup page, as well as the term used to show current gradebook grades.

## Student Data and Enrollments

Before the new school year begins, review student data and course enrollment records. By identifying any missing or incomplete data, you can avoid issues once the school year starts. A few fields affect reporting and functions for all students. If the following fields are blank or contain data that was entered incorrectly, invalid values will appear on reports, or students may be missing from reports entirely.

Review the following fields that affect reporting and system functionality. Each field in this list is followed by the field name from the database:

- Date of Birth: DOB
- Full-Time Equivalency: FTEID

- Federal Ethnicity: FedEthnicity
- Reporting Ethnicity: Ethnicity
- Gender: Gender
- State/Province Number: See the appropriate state/provincial reporting guide on PowerSource

Use the search field on the Start Page to identify students with a blank value for any of these key fields. For example, to search for a blank full-time equivalency value, enter **FTEID=** in the search field and click the Search icon.

Follow the same steps for the other key fields, as well as additional fields identified as important for your district. To find other field names in the Students table, click **View Field List** on the Start Page. For fields stored in other tables in the database, search using Direct Database Export (DDE).

## School and Course Enrollments

Search for invalid school enrollment dates using the search field on the Start Page.

First, switch to a school and verify the start and end dates of the year term. Then, in the search field on the Start Page, enter a search to locate students with a school entry date that occurs before the first day of the school year, such as **entrydate<08/15/2018**.

If the search returns a group of student names, you can mass modify school enrollment dates using the Student Field Value group function. Also search for exit dates that occur more than one day after the last day of school, which is the standard configuration for exit dates.

To identify invalid school and course enrollments, run the School Enrollment Audit and Section Enrollment Audit reports. Navigate to the System Reports page from the Start Page. Then from the Membership and Enrollment section, click either **School Enrollment Audit** or **Section Enrollment Audit**.

Use these reports to identify students with overlapping dates for school enrollments or conflicts between course and section enrollments. Unless you find a group of students with the same incorrect dates, you'll have to update each student record individually.

# Additional System Reports

## Additional System Reports

PowerSchool SIS includes several system reports to help you manage your student information. You've seen some of the system reports in other sections already. These reports are divided into several categories: attendance, attendance tracking and notification, discipline, grades and gradebooks, membership and enrollment, plugins, scheduling, statistics, and student listings. On the Start Page, click **System Reports**.

## Grades and Gradebook Reports

Use PowerSchool SIS to find the number of students earning each grade in your grade scale, print teacher gradebooks, and view a list of students on the honor roll.

Report	Description
Class Ranking	View each student's name, GPA, and percentile sorted by class rank. Select the grade level and GPA type and which GPAs or percentiles appear.
Grade Count or by Teacher	View the number of students who have earned each grade listed on your school's grade scale. Select the group of students and determine whether you want to look at current grades or historical grades from a previous grading period. You can also view this report for each teacher in your school.
Grades Distribution	Identify trends in instruction, grading, and assessment. The report helps determine the validity and consistency of grading practices within the school.
Graduation Progress Report (PDF)	Create a PDF that displays the graduation progress information for the students you specify. You can select all students, the current selection of students, or specify the grade levels you want to include in the report.
Honor Roll	View a list of students who are on the honor roll. You can specify the honor roll method, store code, school year, and historical grade level you want to include in the report.
Teacher Gradebooks	Create a PDF file that displays the specified teachers' gradebook from PowerTeacher. You can select the teachers, periods, assignment range, and final grades you want to include in the report.

## Membership and Enrollment Reports

In addition to the traditional ADA/ADM reports, PowerSchool SIS includes reports that compile and show membership and enrollment figures for special programs and reporting segments, student enrollment for your school on a specified date, and enrollment per section or vocational program.

## Additional System Reports

Report	Description
ADM/ADA By Date	View the average daily membership/average daily attendance for each date in the range you specify. ADM/ADA totals appear at the bottom of the report.
ADM/ADA By Student	View the average daily membership/average daily attendance for each student in the group you specify during the date range you specify. ADM/ADA totals appear at the bottom of the report.
ADM/ADA By Minute	View the average daily membership/average daily attendance by minute for each period during the date range you specify.
Aggregate Membership Audit Report	View a class list of all students ever enrolled in the course/section and their membership information. Specify the course and section number and the term to display on the report.
Class Size Reduction Report	View daily enrollment totals by section for a specified reporting period or date range. It also displays average enrollment statistics. Select the reporting segment or date range, the special program to exclude from enrollment statistics, and the sort order of the results. You can also select which courses and sections to include or exclude.
Enrollment by Grade	View detailed enrollment by grade level. You can select the reporting segment and grade levels to display on the report. In addition, the report includes a conflict report that checks for students with possible enrollment date errors. To access the conflict report, click <b>Check for possible conflicts</b> at the bottom of the "Enrollment By Grade" page.
Enrollment by Section	View detailed enrollment and attendance information by each teacher and section. Select the reporting segment or date range, sort order, and which course and sections you want on the report.  In addition, the report includes a conflicts report that checks for students with possible course enrollment errors. To access the conflict report, click <b>Check for possible conflicts</b> at the bottom of the "Enrollment By Section" page.
Enrollment Summary by Date	View a summary of enrollments for the dates you specify. The information appears in a table by grade level, ethnicity, and gender.
Voc. Courses Agg. Membership	View aggregate days of membership for courses designated as a vocational course in the course setup information.

## Additional System Reports

Report	Description
School Enrollment Audit	View possible conflicts with student entry and exit dates. You can also access this report by clicking <b>Check for possible conflicts</b> on the Enrollment By Grade page.
Section Enrollment Audit	View possible conflicts with entry and exit dates in course enrollments. You can also access this report by clicking <b>Check for possible conflicts</b> on the Enrollment By Section page.

## Student Listings Reports

Use these reports to show student schedule information (including grades and attendance information), print class lists, or print your school's master schedule.

Report	Description
At Risk	View a list of courses, sections, and grades associated with students who are currently at risk of failing the current term.
Class Rosters (PDF)	Create a PDF of the student information you specify for each teacher's selected sections.
Master Schedule (PDF)	Create a PDF of your school's master schedule. Specify which periods, days, rooms, or teachers you want to include, as well as how the information is sorted on the report.
Student Schedule Listing	View student schedule information for either a selected group or all currently enrolled students. Choose to include the room, course name, teacher name, current or historical grade, citizenship, attendance, attendance points, or a single assignment score. You can also specify which periods and days to display on the report.

## Regulatory Compliance Reports

PowerSchool continually strives to update and expand the system's regulatory compliance reporting capabilities. New reports are added to the system frequently and can be found by navigating to **System Reports > State**. For more information about regulatory compliance reports, open the PowerSchool SIS Help menu on the Start Page and then click **State Reporting Help**.



## Custom Reports

Communicate more effectively using customizable reports. In this section, you'll learn how to create a form letter and a mailing label.

### Creating Form Letters

Create form letters using PowerSchool SIS fields, codes, and HTML tags to personalize the information.

PowerSchool SIS form letters include three elements:

- Text, or the body of the letter
- Fields and codes that pull data from PowerSchool SIS
- HTML tags that help format the letter

The text is the content of the letter. Type the letter as you would any other letter. When you come to a part that you want to customize, such as a student's name, insert a placeholder, such as **xxxx**. The placeholder indicates that you will go back and customize that piece of information.

The next elements are PowerSchool SIS fields or codes. Access the list of PowerSchool SIS student fields by clicking **Fields** at the top of the Edit Body page. After you type the letter and add placeholders, replace them with PowerSchool fields or codes.

Create a draft on a piece of paper and then follow these steps to add it to PowerSchool SIS.

1. On the Start Page, click **System Reports > Setup > Form Letters > New**
2. Enter a title
3. Select a data table: Students or Staff
4. Format the page style and dimensions

Make the line height two points higher than the font size.

5. Select whether to make the form letter available to all users or only users at your school
6. Select whether teachers can print
7. Click **Submit**
8. Click the name of the letter
9. Click **Report Body**
10. Type the body of the letter

Use PowerSchool SIS fields to insert information from the database (click the Fields link to select valid fields). Use data access tags to insert data from the server. Use HTML tags to customize the look of your letter. See table below for more about the HTML tags.

11. Click **Submit**

## Using HTML Tags on a Custom Report

Use HTML tags to format parts of a custom report. HTML tags are like light switches. With many of the tags, you turn on the formatting switch first (with one HTML tag), type the text, and then turn off the formatting switch (with another HTML tag), though occasionally some tags don't need to be closed.

For example, to center the name of your school and your school's address at the top of your form letter, use the <center></center> tags to format the text.

The following table provides information about some common HTML tags:

HTML Tag	Definition	Example	Results
<center></center>	Centers the text on the page	<center>Apple Grove High School</center>	Apple Grove High School
<font size=16></font>	Changes the font size to 16 points	<font size=16>123 Maple Drive</font>	123 Maple Drive
<b> </b>	Changes the style of the text to bold	Keep your username and password <b>private</b>.	Keep your username and password <b>private</b> .
<i> </i>	Changes the style of the text to italic	Welcome to <i>Apple Grove High School</i>	Welcome to <i>Apple Grove High School</i>
<u> </u>	Changes the style of the text to underlined	Report cards will be distributed this <u>Thursday</u> to all students.	Report cards will be distributed this <u>Thursday</u> to all students.

## Using PowerSchool SIS Fields and Data Codes on a Custom Report

Customize your report for each student by adding PowerSchool SIS fields. For example, a school may send a welcome letter to each student at the beginning of the school year. Use PowerSchool SIS fields on a form letter to automatically print each student's name and address, as well as other information.

To include PowerSchool SIS fields on a custom report, use this format: ^(fieldname). For example, to print each student's last and first name on a form letter, enter ^(LastFirst) in the body of the letter where the name would appear.

Also include additional information using data codes. For example, automatically include the current date by using the code ^[letter.date] on a custom report. Data codes that include an asterisk (\*) complete a calculation and display the result on the report.

# Custom Reports

The following table lists some common PowerSchool SIS report codes:

Code	Definition	Example	Results
^[time]	Prints the current time	This report was printed at ^[time].	This report was printed at 10:37 AM.
^(He/She) ^(he/she) ^(him/her) ^(His/Her) ^(his/her) ^(son/daughter)	Prints the correct pronoun for each student based on the Gender field	Your ^ (son/daughter) is invited to make up ^ (his/her) attendance points during our Saturday school sessions.	Your daughter is invited to make up her attendance points during our Saturday school sessions.
^(schoolname)	Prints the name of the school	Welcome to ^ (schoolname) !	Welcome to Apple Grove High School!
^(yearname)	Prints the school year	We are looking forward to a great ^ (yearname) school year.	We are looking forward to a great 2018–2019 school year.
^(*credit_hours)	Prints the number of cumulative credit hours the student has earned	Your student has earned a total of ^ (*credit_hours) credits.	Your student has earned a total of 12 credits.

For more information about PowerSchool SIS codes, sign in to the PowerSource website at <https://support.powerschool.com>. Use resources such as the Data Access Tags Supplement for PowerSchool SIS.

## Printing Custom Reports

To print custom reports in PowerSchool SIS, start by selecting the student or group of students for whom you want to print the report.

1. On the Start Page, search for and select the student group
2. Click the Select Function arrow and choose **Print Reports**

If you select an individual student, click **Print A Report**.

3. Choose the report to print
4. Print for all selected students or print a quick test of 2 records
5. Select the order in which you want the report to print for the selected students
6. If the report includes the student's schedule, print either current courses or enrollments as of a certain a date
7. If the report contains student fee information, specify which transactions to include

8. To include a watermark on the report, choose one of the standard phrases or choose Custom, and enter the phrase in the blank field
9. For Watermark Mode, choose the placement of the watermark
10. Choose when you want the report to run
11. Click **Submit**

## Creating Mailing Labels

Print mailing labels for students or staff. When you send a form letter to every student, use a mailing label that you printed from PowerSchool SIS.

You can also use mailing label layouts in other ways. For example, the counselors give each incoming 9th-grade student a folder. Create a mailing label with the student's name, locker number, and locker combination, and affix one to each folder.

When you create mailing labels, you need to know the size of the label stock. Refer to the box for this information. The following layout is for the Avery 5160 label stock.

To create a mailing label, click **System Reports > Setup > Mailing Labels > New**.

<b>Layout Name</b>	Student Home Address (Avery 5160)		Table	Students	
<b>Font</b>	Times				
<b>Font Size</b>	10	points	<b>Line Height</b>	10	
				points	
<b>Page Left Margin</b>	.19	inches	<b>Page Top Margin</b>	.5	
				inches	
<b>Label Width</b>	2.63	inches	<b>Label Height</b>	1	
				inches	
<b>How Many Columns Of Labels</b>	3		<b>How Many Rows Of Labels</b>	10	
<b>Space Between Each Column</b>	.12	inches	<b>Space Between Each Row</b>	0	
				inches	
<b>Horizontal Padding For Label Text</b>	.2	inches	<b>Vertical Padding For Label Text</b>	.2	
				inches	
<b>Label Content Fields</b>	TO THE PARENTS OF: ^(First_name;uppercase) ^(Last_Name;uppercase) ^(Mailing_Street;uppercase) ^(Mailing_City;uppercase), ^(Mailing_State;uppercase) ^(Mailing_Zip)				
<b>Make this label accessible to</b>	<input checked="" type="radio"/> users at all schools <input type="radio"/> only users at Apple Grove High School				
<b>Teachers can print?</b>	<input checked="" type="checkbox"/>				
<a href="#">Export as a template</a>					

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## PowerSchool SIS Security

Set up and maintain PowerSchool SIS security options for the district on the System Administrator, the System Settings pages, and on the Security Settings page for each staff member.

Begin by formatting the security settings on the System Administrator page. System security for administrative staff is based on security groups and user access roles. These roles can differ at each school the user accesses. Teacher access PowerTeacher and PowerTeacher Pro based on their assigned teacher roles.

Use security groups to define overall PowerSchool SIS access, such as view only or view & modify, and to define access to tasks that users perform for students, such as entering health information or scheduling students in classes.

Click **System** to navigate to the System Administration page. In the Security section, click **Groups** to set up each security group and to assign each group a level of access based on the staff members' job functions. Use or update the 50 default security groups before adding any additional security groups. Click a group name to modify the fields.

For every security group you use, format these areas on the Edit Groups page:

Field	Description
Group Name	Enter a descriptive name for users assigned to this group.
Access Level	Choose whether the group will have no access, view-only access, or view & modify access.
Page Level Permissions	Click <b>Overridden Page Permissions</b> to view the PowerSchool SIS pages where the access level differs from the group default access level.
Can Modify Schedules	Limit if and when the group can change student schedules.
PowerScheduler Access	Grant permission to access PowerScheduler and display the PowerScheduler link on the main menu.
Language Translator/Customizer	Choose to display the "Localize page" icon in the navigation toolbar and use the language translator feature.
Report Queue Priority	Assign priorities to reports that each user processes.
Accessible Log Types	Select the log types that the group can see and use on the Log Entries student page, and which log types they can search for on the Log Entries Search special function page.
Accessible Incident Types	Select the incident types that the group can see and use on the Incident List special function page and on the Incidents student page.
Health and Immunization	Choose the level of access on the Health student page.
Accessible Student Screens	Select which links to show on the student pages menu and make accessible to the group.

Review security groups on a regular basis and update as needed to ensure that user permissions remain accurate. When new PowerSchool SIS features are released, sometimes it is necessary to add or remove the new functionality for a group.

## Adding Security Groups

PowerSchool SIS comes with 50 default security groups, but if you need more groups, you can add up to 500. From the Groups page, click **Add Groups**. When adding groups, use a naming convention for the prefix to manage the groups more easily. For example, if the security groups you add are for high school staff, start the name of the group with **HS**.

Keep in mind that once you add a security group, it cannot be removed, so add groups only as needed.

## Filtering and Copying Groups

After you add new security groups, set the security permissions for each of those groups. Find the new groups using the Filter field. On the Groups page, enter a partial or complete group name. The page will refresh as you type and will list the groups that have a matching name.

Select a group and set up the permissions manually or copy the permissions from a similar group that already exists. When you copy permissions, begin by selecting the name of a group that is already set up. Click **Copy Security Permissions**. Choose to copy the group security settings and/or page permission settings. Use the Filter field to see only the new security groups. Then, select the groups to copy permissions to. Keep in mind that one security group must retain full access. You will receive a warning if you try to copy view-only access to all the security groups.

## Setting Page Permissions

Once you assign staff members to security groups, consider using page permissions to modify security settings for individual PowerSchool SIS pages, such as the District Setup page. The page access level that you set for each group (None, View-only, or Full) will overwrite the group's default access level. A page link will still appear in the menus, but when users in a group with no access click it, a message will appear that states that they don't have access privileges.

## Roles Administration

You've already seen that PowerSchool SIS security contains many layers and that you will format settings on several system pages. The next area to consider is roles administration. On the System Administrator page in the Security section, click **Roles Administration**. In this class, you will work with user access and co-teaching roles.

## Setting Up User Access Roles

With user access roles, you can control how users access PowerSchool SIS in certain circumstances and in external applications. Assign a security group to a user access role to overwrite the default security group for users in a certain school context. With this approach, a user could have view and modify access to the home school using group

# PowerSchool SIS Security

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security, and view-only access to another school using role security. Assigning a user access role also can grant users access to other PowerSchool SIS features such as PowerTeacher Pro read-only admin access, Data Export Manager, and Enterprise Reporting.

Use one of several default user access roles or create a new role by clicking **New**.

Use the Definition tab on the Edit User Access Role page to:

- Add or edit a role name and description
- Enable or disable the role
- Assign PowerTeacher Pro read-only admin access
- Provide permission to lock reporting terms
- Assign or edit a default security group for the role
- Edit the accessible document attachment categories

Once you've entered the selected information for this role, click **Submit** to save the role.

Use the Export/Edit tab to assign permissions for Data Export Manager. Define which data sources a user can export and/or edit and restrict access to the data in certain tables or in groups of data sets. For example, if you have a user access role specifically for attendance staff, you can modify access to the tables in the Attendance category so that users may export attendance data but may not access student health data.

Set the Default Access Level settings globally and then set the exceptions by searching for specific data sources, such as tables in the Attendance category, to give the role exporting and/or editing access to those tables. Conversely, if the defaults are set to allow access to everything, you can clear the Use Defaults check boxes and then disable access to certain tables for the role. Click **Save** to save your changes.

Use the Enterprise Reporting tab to grant the user access role permissions to Enterprise Reporting reports and categories. Access to Enterprise Reporting is not granted by default to any PowerSchool SIS users. When you're done, click **Save**. Take the Enterprise Reporting classes to learn more.

## Enabling PowerTeacher Pro Administrator Access

Occasionally, a school administrator may need to access a teacher's gradebook. For example, if a teacher needs assistance with troubleshooting final grade calculations, an administrator may access his or her gradebook in read-only mode. The administrator can view any part of the gradebook but cannot make any modifications.

To make it possible for an administrator to access PowerTeacher Pro, first edit the administrator's assigned security user group. On the school Start Page, click **System**. In the Security section of the System Administrator page, click **Roles Administration**. On the Roles Administration page, click **User Access** and then select the user group, such as **School Administrator**. On the Edit User Access Role page, check **PowerTeacher Pro Read Only Admin Access** and click **Submit**. To verify that the correct user role is assigned to the administrator, locate his staff record and click **Security Settings**. On the Security Settings page, click the "Admin Access and Roles" tab. In the "Roles and Schools" section, verify that the user role, such as School Administrator, is listed in the "Roles (Group Name)" column for the administrator's school. If it is not, click the Edit icon, select the user role, and click **Submit**.

To access a teacher's gradebook, click **Teacher Schedules**. Click the name of the teacher. Then click **PowerTeacher Pro**. When you access the teacher's gradebook and the teacher is also signed in, you will not terminate his or her session, which means you can view the gradebook at the same time as the teacher. This feature is helpful when troubleshooting an issue.

## Enabling Manage Locked Reporting Terms

To ensure grade consistency, a system administrator may need to lock grades at the end of a term. To make it possible for an administrator to lock terms, first edit the administrator's assigned security user group. On the school Start Page, click **System**. In the Security section of the System Administrator page, click **Roles Administration**. On the Roles Administration page, click **User Access** and then select the user group, such as **District Administrator**. On the Edit User Access Role page, check **Manage Locked Reporting Terms** and click **Submit**.

## Mass Assign or Remove User Access Roles

Mass assign or remove user access roles using the function on the System Administrator page. Use the Staff tab to select the group of staff members you wish to work with and then click **System**. In the Security section of the System Administrator page, click **Mass Assign/Remove User Access Roles**. Roles are separated by those with and without an assigned security group. To remove the staff members' currently assigned roles, click **Remove** and **Confirm Remove**. To assign a role, select a role from the possible roles list and click the right-facing arrow. Then, click **Assign** to assign this role to the staff members.

## Adding Co-Teaching Roles

When you navigate to the Co-Teaching Roles page from the Roles Administration page, you'll see all the permissions for each role organized in a table. Use co-teaching roles to define security settings for teachers in PowerTeacher and PowerTeacher Pro/Unified Classroom. Then define what co-teaching information staff, parents, and students will see in PowerSchool SIS. Decide if these default co-teaching roles will work for your district:

- Lead Teacher – The teacher assigned to a section (always has full system permissions)
- Co-Teacher – A peer to the lead teacher
- Teacher's Aide – The teacher's assistant
- Class Observer – A person who may audit a class but has no administrative responsibilities

You can modify the access for these roles except for the Lead Teacher role. For the Co-Teacher role, decide if the co-teacher associated with a section can access course information, whether the co-teacher's name should be visible to parents and admin users in PowerSchool SIS, and whether the co-teacher's name should appear on reports. Select the role name to give co-teachers permission to view or modify their co-teaching sections in the gradebook. To add additional roles, click **New**.

In the right corner, above the Co-Teaching Roles table, click **Configure Table** to customize the information that you see on this page. For example, change a column name or select whether certain columns appear on the page.



## Staff Security

Use the staff Security Settings page to configure security settings that give staff members access to PowerSchool SIS. The Security Settings page is divided into three tabs:

- Teachers and Affiliations – Format security for users who will have access to PowerTeacher and PowerTeacher Pro, and add additional schools where they can use these features
- Admin Access and Roles – Format security for users who will have access to the administrative side of PowerSchool SIS, including security groups and user access roles, and add additional schools where they can use these features
- Applications – Format security for admin users who need access to PowerTeacher Administrator (for use with PowerTeacher Gradebook), ReportWorks Developer, and Oracle Application Express Account (APEX)

Determine what access the staff member needs and then use the appropriate tab to customize security levels for the staff member.

## Configuring Teacher and Affiliation Settings

Use the "Teachers and Affiliations" tab to identify PowerTeacher and PowerTeacher Pro/Unified Classroom users, enter sign-in information, and affiliate schools with a user. Affiliate schools with a user who teaches at more than one school and who needs to change schools in PowerTeacher and PowerTeacher Pro.

By default, a teacher has access to only his home school. Add a school affiliation for any other school where he teaches. Entering affiliations adds the school to the School menu in PowerTeacher or PowerTeacher Pro/Unified Classroom. Once a new school is added to the teacher's school affiliations and Teacher is assigned as the staff type, the teacher can be assigned to course sections at two or more schools. Keep in mind that school affiliations are limited to PowerTeacher or PowerTeacher Pro/Unified Classroom and do not apply to PowerSchool SIS.

Typically, you will complete the "Teachers and Affiliations" tab for teachers only. The tab contains a home school record for all staff members. The only time you'll use the tab for a non-teaching staff member is when that person's home school is changing.

### What about co-teachers?

While lead teachers have the same access to PowerTeacher or PowerTeacher Pro/Unified Classroom regardless of where they teach, co-teachers have different security access. Earlier, you edited co-teaching roles, and how you formatted the role determined the security level for that role.

Now decide which role you'll assign to each co-teacher, keeping in mind the security restrictions.

To identify a teacher as a co-teacher, navigate to **School > Sections**. Then, select a course name and a section number. In the "Teachers/Staff – Additional" section, click **Add**. Choose the teacher's name. Then choose the role, keeping in mind that the role you choose determines what the teacher can see and do in PowerTeacher or PowerTeacher Pro/Unified Classroom.

## Configuring Admin Access and Roles Settings

Use the "Admin Access and Roles" tab to identify admin users, enter admin sign-in information, choose a default security group, limit admin access to certain times and IP addresses, add schools that the user can access, and set user access roles.

After entering sign-in information, choose a default security group for the user. Use the default group to set the level of access for this user at the home school. While users can switch schools, only one school will be identified as the home school (the school where the user works primarily).

Next, add schools that the user will have access to, including the home school. You'll find the home school listed on the "Teachers and Affiliations" tab and the Information page for all users. Add all the schools at once if the user will have the same group security and the same role security.

When the user needs a different access level for another school, add that school separately, and select a role. For each school you add, select a role to apply security settings.

For example, suppose the high school registrar has view and modify access privileges at her home school, but her access at the middle school is different. Instead of using group security, select a role with view-only access so that she can view student information at the middle school and still keep her privileges to modify records at the high school.

You won't know what her level of access is by looking at the list of schools associated with this user. Click the Information icon for a school to see a list of security attributes, including overwritten page permissions and any field-level security settings.

## Configuring Application Access

Use the Applications tab to give teachers and admin users access to PowerTeacher Administrator, ReportWorks Developer, and Oracle Application Express Account (APEX). Check the box or boxes for the applications that they'll use. When a teacher needs access to PowerTeacher Administrator or ReportWorks Developer, be sure to also complete the "Admin Access and Roles" tab.

## Assigning Substitute Passwords

A substitute teacher can sign in to the PowerTeacher substitute site by entering your PowerSchool SIS server address followed by `/subs`. For example, `yourschool.powerschool.com/subs`. Substitutes can only take attendance, read the daily bulletin, and submit lunch counts. They cannot access any additional student information or launch PowerTeacher Pro or Unified Classroom. To sign in, a substitute must select the school where she is working, select the name of the teacher she is substituting for, and enter that school's substitute password. You set up this password on the Substitute Sign In Settings page at each school by navigating to **School > Sub Sign In Settings**.

## Direct Database Export and Access

At times, finding the data you need means you must do more than just navigate to a page or quickly export the information. Sometimes you need to search the database. Two powerful methods for accessing the database directly are DDE (Direct Database Export) and DDA (Direct Database Access). Use DDE to search, match, and export data from your PowerSchool SIS server. Use DDA to modify or delete data records.

With these features, you'll have access to the majority of the database. PowerSchool SIS is a relational database that operates much like linked spreadsheets. Within the database are tables that contain an unlimited number of fields. Each record in a table contains a unique identifier called the primary key. A matching field in another table is called the foreign key. Tables must contain matching primary and foreign keys to be linked. Use the Help menu to access the PowerSchool Data Dictionary to learn more about tables and fields.

After selecting data, you have two viewing options. Your first option is to view the data by record number in list view. Once in the list view, click a record number to see the information contained in the record. By looking at the record, you can see which fields are available and how they're used.

Your second option is to view the records by name in table view. Once in table view, click the record name to see the information. Table data is sorted by clicking the field headings and the A or D at the left side of the column titles for ascending and descending.

Besides viewing data, you can also use DDE to export data out of PowerSchool SIS. The export function works the same way as Quick Export.

The interface for Direct Database Access (DDA) is similar to the DDE interface. However, when using DDE, you have access to only read and export data, whereas in DDA, you can also change and delete records in the database. Because a DDA user has the ability to modify records, use page permissions to limit access to system administrators only.

Access DDE by clicking **System > Direct Database Export (DDE)**. There is no link to DDA in PowerSchool SIS. Either access DDA from DDE by changing `dde` in the URL to `usm` or access DDA directly by entering the following address in the URL bar:

`http://server.address/admin/tech/usm/`

Users without DDA permissions will receive an error message when they attempt to access DDA.

## Conducting a DDE Search

The following is an example of how to conduct a search in DDE to find students at a particular school who received A grades during specific grading terms and how to view the returned results.

1. On the Start Page, click **System > Direct Database Export (DDE)**

The currently selected records represent the last group of students you searched for on the Start Page. Sometimes you will use this group in your search, but not always.

2. From the Current Table menu, select **StoredGrades**
3. From the first Search StoredGrades menu, select **TermID**
4. From the comparator menu, use the default selection of the = sign

# Direct Database Export and Access

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5. In the text field, enter the TermID you are searching for, such as 2801

The TermID 2801 will return the second term created for the school year 2018-2019, such as Semester 1 or Trimester 1.

6. From the second Search StoredGrades menu, select **Grade**
7. From the comparator menu, select the **<=** sign
8. In the text field, enter **A-**
9. Check **Search only in records belonging to "this school"**
10. Click **Search all [xx] records in this table**
11. Click **List View**
12. Click a student ID number highlighted in blue
13. In the breadcrumbs, click **Direct Database Export (DDE)**
14. Click **Table View**
15. To sort the results by student ID, click the Student ID header
16. In the breadcrumbs, click **Direct Database Export (DDE)**
17. Click **Export Records**
18. Enter the following fields in the text box:

```
[Students]LastFirst  
Course_Name  
Grade  
Percent  
Teacher_Name
```

19. Click **Submit**
20. Open the exported records with a program such as Excel

## Modifying Records

Use DDE to find data records and extract them from the database as a text file, but when you wish to modify or delete data, use Direct Database Access (DDA). Use DDE without the risk of modifying or deleting data. Use DDA only when you must make a change.

It's a good practice to create a data file backup before mass modifying data with DDA. PowerSchool SIS makes full weekly backups and nightly incremental backups automatically, but it is a good idea to have a point-in-time backup so that all changes made between backups can be restored.

The phrase "modifying records" means more than just changing the data contained in a field. When using DDA, it's possible to make the following modifications:

- Add a value to an empty field
- Change the value in a field to another value
- Delete a value in a field
- Delete an entire record, such as a student, course, or section

# Direct Database Export and Access

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Also, you can add a new value to an existing value in a field. Using DDA, append the value in the desired field by adding a new value to existing values. Use the caret (^) character to add to the existing value in the field you're modifying.

Be careful and make sure that modifying records is the best way to achieve your goal. Know the consequences of the record modification, not only in the parent table, but also in related tables. Modifying data in one table without understanding the implications to other tables can create orphan records and database issues.

For example, the CC (Current Classes) table has many relationships to other tables, such as the Sections table, the Students table, and the Terms table. Changing the SectionID field in the CC table impacts how it relates to the ID field in the Sections table. If you change this value in the CC table, it is no longer related to the previous section within the Sections table. The StoredGrades table has relationships to other tables too, such as the Students table, but if modifications are made, the relationship will be lost. Many fields, like the DateStored field, stand alone and changes to them won't impact any other tables. It is always best to search the Data Dictionary to determine which tables are impacted before modifying or deleting data.

Here is an example of how to use DDA. Suppose during the summer while enrolling and scheduling new students not everyone remembered to use the first day of school for the students' entry date and the first day of classes. To avoid attendance and regulatory compliance reporting issues, after the End of Year process is complete, use the Students and CC tables to update any incorrect student records. If all schools in your district start on the same day, update all currently enrolled students at once. It doesn't matter which school you are currently in; with DDE and DDA, you have access to all data for your district.

1. On the Start Page, click **System > Direct Database Export (DDE)**
2. For the Current Table menu, select **Students**
3. From the Search Students menu, select **Enroll\_Status**
4. Use the default comparator and in the text box, enter 0

Zero is the field value for currently enrolled students.

5. From the Search Students menu, select **EntryDate**
6. From the comparator menu, select the < sign
7. In the text box, enter the first day of school
8. Click **Search all [xx] records in this table**
9. Click **Table View**
10. Verify all of the dates in the EntryDate field are prior to the first day of school
11. Navigate to DDA using the URL: <https://yourserver/admin/tech/usm>
12. Click **Modify Records**
13. From the field menu, select **EntryDate**
14. For the field value, enter the first day of school
15. Click **Modify Selected Records**
16. Click **Confirm Modify Selected Records**
17. Return to the DDA page and change the Current Table to **CC (4)**

## Direct Database Export and Access

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18. Enter the search **TermID >=** and the year term for the current year
19. Enter the second search of **DateEnrolled <** and the first day of school  
  
You must search for CC records in the current school year only to avoid modifying records from previous school years.
20. Click **Search all [xx] records in this table**
21. Click **Table View**
22. Verify that only TermIDs greater than the current year TermID are present and that all of the dates in the DateEnrolled field are prior to the first day of school
23. Click **Direct Database Access (DDA)** in the breadcrumbs
24. Click **Modify Records**
25. From the field menu, select **DateEnrolled**
26. For the field value, enter the first day of school
27. Click **Modify Selected Records**
28. Click **Confirm Modify Selected Records**

# Additional Training Opportunities

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## Additional Training Opportunities

With a Professional Development Plus (PD+) subscription, any staff member in your district can use PowerSource to access the entire library of online training courses and videos. Staff members can take 60-plus-minute interactive courses to learn how to complete processes. All users also have unlimited access to view the 5- to 30-minute videos on how to complete specific tasks. When a user successfully passes a final quiz in an interactive course or finishes watching a training video, he or she is awarded a certificate of completion. To access the trainings, navigate to <https://support.powerschool.com> and select **Training**. To access the entire library, click **PD+ Training**. Or, to explore additional training tools, on the Training page under Other Training Tools, click **Training Resources**.

On PowerSource, you'll find the PowerSchool SIS training calendar for instructor-led training events and PowerLabs. You'll also find information for PowerSchool University (PSU), which is PowerSchool's national 4-day training conferences. To request your own live training event, view the course catalog and contact us at [training@powerschool.com](mailto:training@powerschool.com).