

PowerSchool Special Programs: Administration

Part 1

In this session, take a tour through what is available in PowerSchool Special Programs, including but not limited to integration and single sign-on. Learn how to manage Special Programs to meet your business requirements.

In this course, you will:

- Access and navigate Special Programs
- Work with student profiles, documents, and events
- Monitor integrations and data flows
- Assign students to staff caseloads
- Perform various administrator functions

Getting Started

Special Programs is integrated with single sign-on from PowerSchool SIS and Unified Classroom.

Signing In from PowerSchool SIS

There are two ways a user can access Special Programs through PowerSchool SIS:

Teachers can access Special Programs from within PowerSchool SIS:

1. Sign in to PowerTeacher
2. Navigate to **PowerTeacher Pro**
3. On the menu bar, click **Apps**, then select **Special Programs Home**

Administrators and staff can navigate to My Home Page in Special Programs from within PowerSchool SIS:

1. In the dark blue border at the top of the page, click the Applications icon that looks like a box with an arrow to open the Applications drawer, then select **Special Programs Home**

Signing In from Unified Classroom

There are two ways a user can access Special Programs through Unified Classroom:

Teachers can access a student's Special Programs documents from within Unified Classroom:

1. Navigate to Students
2. Select a student and click **View Detail**
3. At the top of the page, click **Quick Links**
4. Under Special Programs, select **Student Documents**

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Administrators, staff, and teachers can navigate to My Home Page in Special Programs from within Unified Classroom:

1. From the navigation menu, select **Quick Links**
2. Under Special Programs, select **Special Programs Home**

My Home Page and Toolbar

My Home Page is your Special Programs dashboard. In the header, the PowerSchool Special Programs logo is a link to My Home Page. Whenever you see this icon, click it to return to My Home Page. Being able to return to My Home Page from almost anywhere in Special Programs comes in handy when you want to start a new task.

The main header toolbar also contains the Search, Communication, and Reports menus. These menus provide options for users to access different portions of the platform to create report and documents. By clicking on these titles, the menu will expand showing the functions that are available to the user based on their security clearance.

Also contained within the header section is the Special Programs Help menu. Click the question mark icon to access the Help menu. Next to the question mark icon is an icon with the current user initials. Click this icon to access a menu of user-related options, including the sign out link. Always sign out of Special Programs when you leave your workstation or are done using the program.

The specific options and panels you have in My Home Page are determined by the security group your user account belongs to and the permissions granted to the security group. Once you leave My Home Page for another page, the page names appear in the navigation toolbar. These linked page names are called the navigation path, or breadcrumbs. Click a link in the navigation path to return to that page.

For this class, your user account is part of the Administrators security group, which has all of the available permissions for full access that a district or province administrator might typically have. Only a system administrator would typically have additional permissions. It is recommended that district or province administrators use their administrator account to perform day-to-day activities and refrain from using their system administrator account except when necessary.

Assuming the System Admin Role

The purpose of managing security is to ensure that users have access to the information and functions they need to perform their responsibilities, and to prevent access to information that is inappropriate for the user's role or designation as determined by the school or district. Access can be divided into two general categories: "read" access (viewing information) and "edit" access (adding, modifying, and deleting information). As an administrator, when you need to sign in with credentials to complete tasks of a system administrator, you will need the Admin PowerSchool Special Programs Administrator permissions. This can be performed if you have access to the Assume System ADMIN Role feature.

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Activity 1 – Classify Actions Based on Security Role

Based on workflow in your district, in the table, list job titles of individuals who will need access to the platform as a System Administrator and those who will need an ADMIN password.

ADMIN	System Administrator Status

Integrations and Data Flow

Learn how data can flow between Special Programs and PowerSchool SIS, and between profiles and documents in Special Programs.

Integration with PowerSchool SIS

PowerSchool SIS and Special Programs are integrated, which means data flows between the two systems to prevent users from having to manually update both systems. Primarily, the information that imports into Special Programs includes student demographic and enrollment information, district, locations (schools), and classes. Other imports include data to create a complete record such as classes with students enrolled and classes with associated staff.

Data moves throughout Special Programs for program-specific data. Once a document is finalized or completed, some of the targeted data fields within the document copies to the appropriate fields in the student profile. State-reportable fields are integrated so that the information is available for the state report.

Program alerts also move between Special Programs and PowerSchool SIS so users can see if a student is identified with a special program. The alerts are icons identifying the special program the student qualifies for and they indicate to the user that more information is available for the student in Special Programs, such as accommodations or modifications in a student's plan.

Activity 2 – Check for Integration Activity

Navigate to Integration to see information about recent integration activity.

1. From the top navigation menu, hover over **Administration** and select **Configuration**
2. From the Configuration options below the blue banner, select **Integration**

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3. On the Import Layouts tab, view the list of integration import layouts

In the Last Imported column, a date will appear to indicate a successful import. If there are import errors, "Success with Row Issues" will appear with a link to the error report.

The Profile Type column indicates where the imported data will go.

The Data Source Type column indicates how the data moves from one system to another.

For example, for the import layout named PowerSchool – Class Import (model), the Last Imported date is 6/15/2019 and the Profile Type is Classes. This indicates that there was a successful import of class information from PowerSchool to the Classes profile in Special Programs. The Data Source Type of PowerSchool SIS Rest API means that this data import is managed through the SIS application program interface (API). Other types of integration data sources might be an Excel file, a text file, or an export report.

Import layout names ending in "(model)" indicate that the import layout is managed by PowerSchool as a standardized import layout that can be used to push import changes to customers. Do not modify these "(model)" import layouts.

4. To see details of the import layout PowerSchool – Student Import, find the layout in the list and click the magnifying glass next to the name
 - Last Imported: Indicates the date and time the import was completed
 - Transfer Options: Updates and adds profiles as appropriate
 - Target Field: Name of the field that is populated in Special Programs
 - Data Source Selection: Name of the table and field in PowerSchool SIS where the data is coming from
 - Link Options: For example, "Do Not Strip Leading Zeros When Matching" preserves leading zeros, such as an ID of 000357 maintains the leading zeros instead of converting to 357.

Another option is "Only Write if Destination is Empty" where the import will not update and overwrite existing data in Special Programs.

5. Return to My Home Page

Data Workflow

In addition to populating profiles from PowerSchool SIS through the PowerSchool Rest API, program information is collected in Special Programs by completing (finalizing) documents. When documents are created, some data is pulled in from the profile such as student demographic and enrollment information. Most document templates are also set to flow data back to the profiles, specifically fields that hold state reporting information.

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Guided Actions

Document and section actions (collectively called guided actions) are configured within the various document templates to guide the user step-by-step in completing documents to meet compliance requirements. Guided actions can be configured to:

- Provide intelligent, context-sensitive explanations
- Warn the user about questionable entries the user has made
- Stop the user from entering invalid information
- Automate the creation of event records based on entries the user has made and to notify other users of those events

Adding Staff Profiles

You may need to add users to Special Programs who are not staff in the district or school. For example, you may contract with an occupational therapist to deliver services to specific students. The therapist needs access to the students' records but will not have access to PowerSchool SIS or Unified Classroom. As an administrator with the necessary permissions, you can create a staff profile and grant permissions by adding the profile to a security group with the proper caseload access. Then provide a direct link to Special Programs to the therapist, who will be able to sign in directly to Special Programs with access to only their students on the My Students panel of their My Home Page.

Activity 3 – Add a Staff Profile

Create a Staff Profile to reflect the following information: You have recently been hired as an Occupational therapist at Apple Grove High School (ID 100). The district uses each individuals' birthday as their ID number (MMDDYY). You will be part of the PRACTICE security group and your temporary password will be Password1!

6. From the top navigation menu, hover over Search and select **Staff**
7. Click **Add New Staff Profile**

The three red fields are required fields.

8. For ID, add your birthday in the format of (MMDDYY)
9. For Name, enter your first and last name
10. At the bottom of the page, click **Accept Changes**
11. At the top of the page, click **Security**
12. Click **Edit Security**
13. For the list of security groups, check **CustomerEd**

The system administrator set up a security group for this class to allow users in the group to access only students assigned to their caseload.

14. Click **Accept**
15. Return to My Home Page

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Adding a General Education Student

The ability to add a General Education Student into Special Programs can become necessary when students are classified in different modules that are offered. Adding a student to Special Programs gives the user the ability to create new documents that need to be attached to the student profile.

Activity 4 – Add a General Education Student to Special Programs

Use the Search Button to add a General Education Student to Special Programs

1. From the Special Programs home page, click **Search**, then select **General Education Students**
2. Using the assigned student name you were given, type in the student's last name and click Search.
3. At the top of the screen, click **Import General Ed Students**.
4. Click to fill in a check mark to the left of the student(s) name you wish to add to Special Programs.

Click the Blue Button labeled **Import General Ed Students**

**Notice the ability to add these students directly to your caseload.

Caseloads

Business processes sometimes require that caseload assignments originate at the district or school level, rather than allowing staff to build their own caseload. Administrators with the appropriate security can assign caseloads to staff members or contract staff with students they have access to. Once a student is added to a caseload, the student will appear on the staff's My Home Page under My Students the next time the staff signs in to Special Programs.

Standard Caseload

For one or more users who are delivering services to a student, a standard caseload can have multiple staff who have education interest in the student's special program. Staff can possibly provide direct services to the student. Standard Caseload appears with a white background and text that is not bolded. Standard Caseload assignments can be assigned either one at a time or for groups of students.

Activity 5 – Assign Students to Another Staff Member's Caseload

Select a staff member, and assign a ninth grade student with the exceptionality of autism to their caseload.

16. From the top navigation menu, hover over Search and select **Staff**
17. In the Last Name field type in the letter A and click Search – Select Staff Member Mark Adams by selecting the profile icon to the left of their name
18. At the top of the Profile page, hover over Main and select **Caseload**
19. At the top of the Caseload page, open the Setup menu and select **Add to Caseload**
20. At the top, select Advanced Search
21. Select Formula Builder to create a Query based on the following guidelines

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- Grade is equal to G09
 - Exceptionality is equal to AUT
22. Click Accept Formula
 23. At the bottom of the page, click **Search**
 24. Check two students to add to the staff member's Standard Caseload
 25. At the top of the page, click **Add Students Marked Below to Caseload**
 26. Return to My Home Page

Exports

Export reports show what information is leaving Special Programs and flowing back to the PowerSchool SIS to create State Reporting Data. These exports are driven from Finalized Documents.

Activity 6 – View an Export Report

In Standard Reports, view what information is being sent from Special Programs back to PowerSchool SIS based on the IEP Process Documents

1. From the Reporting menu, Select Standard Reports
2. From the Categories of Viewable Reports, expand the category labeled PowerSchool SIS Export
3. Select the report PS Special Education Exports by clicking the blue hyperlink
4. At the top click the button labeled Update Report with Values

Notice you can now see the data that is being reported to PowerSchool SIS from all Documents under the IEP Process Category

Data Dictionaries, Integrations, and Data Flow

As an administrator, you need to understand the fields and data flow for the information in Special Programs. Learn how to use the data dictionaries to help you understand the fields and how they are populated by data flow between profiles and documents, integrations, or manual data entry.

Data Dictionaries

In the data dictionary for a profile or document, data fields are defined with the following (if applicable):

- Name: Each field has a unique name within the profile type, such as student profiles.
- Data Type (Length): Each field stores a specific type of data. For some data types, such as "Character", a field length is also indicated. An explanation of each data type is given below.

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- ID (Length): Most types of profiles, such as students and staff, include an ID field that serves as the system-wide unique identifier for profiles of that type. If PowerSchool Special Education is integrated with a Student Information System (SIS), this field will generally be set as read only.
- Character (Length): This type of field is used to store text. Each character fields allows a single line of text with a maximum number of characters (specified as part of the field definition when the field was created or modified).
- Logical: This type of field is used to store a true or false. When included in a profile form section, a logical field appears as a single checkbox indicated false when unchecked and true when checked. It can also be displayed as multiple checkbox if the values need to be represented as true, false, empty (no value).
- Date: A field used to store a date. Dates appear with a popup calendar.
- Date/Time: Similar to date, but also stores a time (hours and minutes) as well.
- Integer: Stores whole number values. An integer field appears on forms as a text box into which users can type. Of course, only valid integer numbers are accepted.
- Numeric: A field used to store a number that can include decimal places. If the number does not include decimals, the field will likely be set as an integer field.
- Short Text (Length): Short text fields are similar to character fields except they allow more than one line of text and has a maximum number of characters is specified as part of the field's definition.
- Long Text: Long text fields are similar to short text fields except that they allow an unlimited amount of text. Typically, Long Text boxes have a variety of options for formatting and data input (Stylized Text, Statement Banks, Speak-to-Text, Spell Check options that could be available).
- Profile Reference: This kind of field references a profile of another profile type (i.e. staff or locations). Profile references fields displays lookup next to the field.
- Keyword Selection: A keyword selection field contains a single value selected from a pre-defined list of possible values in a keyword table. Keyword selection fields are presented to the user as a dropdown menu.
- Image: Stores a web-ready image type (GIF, JPG, or PNG), useful for storing a student photo.
- Properties: This column shows special properties of each database field:
 - Quick Search: Fields with this property appear on the quick search form and contain a database index to speed searches.
 - Organizational Parent Reference: Fields with this property are used to control organizational security when users are accessing this type of profile. In other words, the value of this field in a profile determines where that profile is located for security purposes.

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- Assessment Filter Field: Fields with this property are used as an analytical field in the assessment repository.
- Custom Field: As a general rule, fields defined in the state model database are NOT custom fields, but fields added locally by the school district are custom fields and so will have a "Yes" in this column. The school district System ADMIN user can only delete or modify custom fields, since these are not used on state/federal mandated reports.
- Attributes: This column shows "attributes" associated with each field. Attributes are themselves customizable and new ones can be defined and associated with fields for purposes of categorization and field level security.
- Description: Provides clarification on what type of data is stored within the field.
- Linked to Sections: Describes all profiles where the field will appear.

Activity 7 – Use the Data Dictionary for a Profile

Navigate to the All Fields data dictionary for the Students profile.

27. From the top navigation menu, click **Administration** and select **Configuration**

28. From the Configuration tabs at the top of the page, select **Profile Types**

Notice the different types of profiles in Special Programs.

29. For the Students profile, click the details icon that looks like a magnifying glass

30. To see a list of all of the fields in the profile, hover over Student Information at the top of the page to open the profile sections menu, then at the bottom of the menu, select **All Fields**

The data dictionary appears with an alpha character menu at the top to choose fields that begin with a certain letter.

31. To see the entire list of fields on one page, at the end of the alpha character menu, click **All**

32. Explore the data dictionary for the Students profile

33. In the Linked To Sections column, notice that many fields appear in multiple profile sections

34. To view fields only in a certain section, open the section menu by hovering over All Fields at the top of the page, then select **Student Information**

The same information appears for the fields on the Student Information section, except the Linked To Sections column because you are viewing information for a particular section.

Data Flow Report

Now you know how to identify which fields are in each profile and the profile sections they appear on, but you also need to know how the fields get populated with data so that you can troubleshoot if a field is missing data or showing incorrect data. Use the Data Flow Report for a selected profile section to access the following information:

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- Field Name Data Type (Length): The field name and a summary of the data type
- Properties: The same properties information when viewing the All Fields data dictionary
- Description: The same description information when viewing the All Fields data dictionary
- Integration Notes: Any integration notes, typically only for special circumstances
- Linked DCT Layouts: Indicates if a field is being populated through integration with PowerSchool SIS
- Template (Data Flow): Describes which document and field populates the profile field (typically data will flow from a document to a profile when the document is finalized)
- Profile Update Scripts (Set/Modify): indicates if a script is running at certain times to update data, such as a calculation based on other fields (not all models use scripts)
- Form Sections: Indicates the profile section where the field appears, similar to the information on the data dictionary but only for the selected profile section

Activity 8 – View the Data Flow Report for a Profile

Navigate to the data flow report for the Student Information profile section and view the information on the report.

35. From the profile section tabs at the top of the page, select **Data Flow Report**

The profile section tabs appear only when a profile section is selected.

36. Open the section menu by hovering over Student Information at the top of the page, then select **All Fields** at the bottom of the section menu

Notice that the profile section tabs do not appear. The Data Flow Report is available only for profile sections.

37. To return to the Student Information profile section, open the section menu and select **Student Information**

38. From the profile section tabs, select **Data Flow Report**

39. Find the LastName field row and look in the Linked DCT Layouts column

Information on the import layouts and fields flowing from PowerSchool SIS to the Special Programs field appear in the Linked DCT Layouts column. You can access the complete import layout by clicking the blue link.

40. Use the section menu at the top of the page to go to the Special Education Information profile section
41. On the Data Flow Report profile section tab, note which column is for Template (Data Flow) then scroll down to find the CaseManager field row
42. Notice the Template (Data Flow) column for the CaseManager field shows IEP Field 'CaseManager'
43. Click the blue link in the Template (Data Flow) column to open the document template data dictionary in a new browser tab with the field highlighted

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44. Close the Document Template Setup browser tab to return to the Profile Type Setup browser tab

Data Dictionaries and Data Flow for Documents

The All Fields data dictionary and Data Flow Report for a document are very similar to those for profiles. The data field types are identical, but the data dictionary for a document provides more in-depth details regarding the properties on the fields and data flow. This is extremely helpful for administrators to gain a full understanding of which fields in documents have data flow and in which direction.

For data to flow between profiles and documents, the document field must be linked to a profile field and must be set to indicate which direction the data will flow, as well as other settings indicating when and how the data is handled.

- Profile to Document (\leftarrow {Field Name}): The arrow before the field name indicates that data flows directly from the profile to the document. You have two options for this setting:
 - Copy only when document created (no updating) ($1x \leftarrow$ {Field Name}): When a document is created, this option will copy the current value from the profile to the document. Once the data is initially copied from the profile to the document, any future updates to the profile will not update the document.
 - Always copy empty values (requires continuous 2-way data flow) (\leftarrow {FieldName} \leftarrow): This setting requires Document to Profile to also be selected.
- Document to Profile ({Field Name} \leftarrow): The field name before the arrow indicates that data flows from the document to the profile. You have three options for this setting:
 - Only when document is reviewed or finalized ({Field Name} \leftarrow): Data flows from the document to the profile when the status of the document is set to either Review or Final and will flow instantly when the status is changed.
 - Only when document is finalized ({Field Name} \leftarrow |): Data flows from the document to the profile only when the document is set to Final and will flow instantly the status is changed.
 - Bypassing profile security (except strong field attribute security ({Field Name} \leftarrow)): Data flows from the document to the profile even if the user who is changing the document status does not have security permissions to edit the profile directly.

Some fields in the profiles have attributes. Strong field attribute security is set for a field so a user cannot edit the field unless the user is a member of a security group with permissions to view and edit fields with this attribute.

At times, you may need to view all of the properties to help you understand and troubleshoot data flow, such as the data flow when a document is reviewed or finalized, or when a field is set to bypass profile security.

Activity 9 – View a Document's Data Dictionary and Data Flow

View the data flow in the IEP document template.

1. From the top navigation menu, select **Administration** then **Configuration**

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2. From the Configuration tabs at the top of the page, select **Documents Templates**
3. Under Special Education, click the magnifying glass icon for Individualized Education Program
4. At the top of the page, click **IEP Cover Page** to open the section menu, then at the bottom of the section menu, select **All Fields**
5. Locate the Data Flow/Default Text column and then scroll down the page to find the Address field row

The value in the Data Flow/Default Text column for the Address field is Parent1Address← which indicates that the value of the first parent's Address field on the document section IEP Cover Page flows to the student profile.

6. To access more properties, click the magnifying glass next to Address
7. To return to the All Fields data dictionary, use the breadcrumbs and click **Individualized Education Program**
8. From the alpha character menu at the top of the page, select **C** then for the CaseManager field, notice the value in the Data Flow/Default Text column shows 1x←CaseManager←|
9. Click the magnifying glass for CaseManager and review the properties

The Link to Profile Field describes the data flow indicated by the value 1x←CaseManager←| you saw in the Data Flow/Default Text column on the All Fields data dictionary.

10. Return to My Home Page

Managing System Settings and End of the Year Roll-Over

From the Settings tab in the Configuration menu, districts can set-up the specific settings for their district's work flow. Each district, from this window, can control:

- Time Zones
- Message Settings
- Calendar Settings
- End of the Year Roll-Over

After the PowerSchool SIS has a System Roll-Over, a manual year end roll-over will need to occur or districts will need to schedule a year end roll over. If the system is integrated with PowerSchool SIS, then no Student Profile selection information will need to be selected, just the manual force of rolling over the data or setting up a scheduled roll-over. This will then change the school years and update the system.

Activity 10 – End of the Year Roll Over (model from trainer)

Navigate to the System Settings and schedule or force an End of the Year Roll-Over

11. From the toolbar, open the Administration window and select Configuration
12. Click Perform End of the Year Roll-Over

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13. Click Proceed

Note, an End of the Year Roll-Over can be scheduled by selecting the pencil icon and selecting a data

Globals

Is reflected as one of the Profile Types that must be configured each year by the by the ADMIN. Globals reflect the information about the district such as location as well as a global calendar with first and last day as well as Federal Count Dates.

This information impacts all Document templates within the system because the data fields are set to pull information from the Globals. If this information is inaccurate, all Documents will then reflect inaccurate district information.

These calendar dates also impact the data that is pulled on State reports because formulas are built to reflect the start dates that are built into Globals.

Activity 11 – Update Globals (model from trainer)

Navigate to the Globals Profile Type and update

1. From the top navigation toolbar, open the Administration menu and select Configuration
2. From the menu bar, select Profile Types
3. Find the Profile labeled Globals and click
4. From the menu bar, select Edit
5. Click Accept Changes

Notice any document template now will reflect the changes made

Utilities in Special Programs

Making changes to staff and student profiles by merging, deactivating, and deleting

Profiles

Special Programs stores information on students, staff, classes, locations and districts in the form of profiles. Depending on how the system is being used, there are at least four main types of profiles:

- Location profiles – There is one location profile for each school, building, or site where students can receive instruction and the administration building.
- District profiles – These types of profiles are used to describe hierarchical groupings of schools (locations) within the organization. If students attend a district outside of your organization, the district and associated schools can be maintained to keep accurate information of enrollment for those students.

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- Staff profiles – There is one staff profile for each teacher, administrator, or other staff member involved in the instructional process. The staff profile contains security information (sign in, password, security group membership) and information fields such as name, phone number, staff position, work location, etc.
- Student profiles – There is one student profile for each student enrolled in the school district. Each student profile contains demographic fields as well as enrollment and program specific data. If student/parent logins are enabled, student profiles also contain security and login information for both the student and the parents of the student.
- Class profiles – This type of profile is the basis for student enrollment in classes. A class profile represents an individual teacher teaching a particular content area to a particular group of students.

IDs

In Special Programs, every student, class, staff, location and district profile has a unique identifier or ID. The ID is a series of digits and/or capital letters with no spaces. It is not necessary to assign a unique ID in Special Programs when integrated with PowerSchool SIS. In this case, the ID is already unique and imported. Another unique ID that is not viewable to the end user is called an IntegrationIDT, which is a system-generated ID used to verify data integrity between PowerSchool SIS and Special Programs. It is necessary to assign IDs if adding data that is not integrated with PowerSchool SIS.

- Student ID – Every student profile must have an ID that is unique across the school district. Student IDs are typically assigned in the Student Information System and is integrated with Special Programs.
- District ID – Every state has a system of district codes that can be used for the unique district IDs.
- Location ID – Every location profile in Special Programs must have a unique ID. Typically, the location ID is a building code of some kind. In situations where students are being sent to and received from other school districts, it is best to make the location ID a combination of a district code and a school code.
- Staff ID – Each staff member (teacher, administrator) must have an ID that is unique across the school district. If the school district already uses staff member codes, those can be used in Special Programs.
- Class ID – Every class profile must have an ID that is unique across the school district. Class is included and is integrated with PowerSchool SIS.

Student and Staff Utilities

Within the Student or Staff Utility Menu ADMIN users have the ability to adjust Student or Staff Profiles in many ways including Deactivating, Deleting, and Merging Profiles.

Activity 12 – Merge Student Profiles (modeled by trainer)

1. From the toolbar, open the Administration menu and select Utilities
2. From the Data Utilities drop-down, select students
3. From the Select Utility drop-down select Merge Student Profiles

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4. Locate the profile of the student you want to merge into (dominant profile) by typing in the student ID number or using the lookup search option and click Find
5. From the chart, select which profile(s) needs to be merged to the dominant profile by clicking the circle to the left of each student name
6. Click continue
7. Select Merge Profile(s) and then OK from the pop-up window
8. Click continue to view the new student profile that reflects the information from all merged profiles

Data Transfer Packages

There are two ways to transfer student documents and profiles. The first way is dependent on the receiving school using PowerSchool Special Programs with security for Data Transfer Packages enabled. The alternate way to transfer data packages is through a secure link to a non-PowerSchool Special Programs district or a PowerSchool Special Programs district that is not utilizing the functionality.

Review this process through instructor-led activities. It is important to note that only document templates that are not set with Exclude From Transfer Envelopes in document behavior will be visible when creating documents. Additionally, the setting to allow a document to become a live document or a template to edit or copy from must have Include Live Documents In Transfer Envelopes. The final note of caution is when selecting live documents, the document will only copy what is identical between the two documents. When transferring within the same state with both parties on the same model configuration, the results are favorable. If transferring across states or when one of the districts has highly customized documents, the results will be significantly less favorable.

Activity 13 – Send a Data Transfer Package to Another District

Send a data transfer envelope from one Special Programs database to another Special Programs database.

1. From the top navigation menu, click **Administration** then select **Utilities**
2. Data Utilities should show **Students**
3. Open the Select Utility menu and choose **Send Data Transfer Envelope**
4. Search for the student using the lookup and Quick Search window to locate the student (or students) whom you want to electronically send the documents and profiles.
5. Select **Create a Transfer Envelope**
6. Click **Generate Student Transfer Envelope**
7. Under Include Documents From Years: select the number of years back to current that you want to select from
8. For Include Only Final Documents, select **No** if you want to send all recent documents

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9. Click **Generate Student Packages**

You can see the progress and percent completed while the system is generating the package.

10. Once the package is generated, select the .zip file to review what is included in the generated zip folder

11. When you are ready to send to another school district, open the Send Envelope to menu and select:

Send Transfer Envelope To School/District Hosted at "specialeducation.powerschool.com"

12. Select the State to Transfer to

13. Then select the District or (production database) to send the envelope

Notice a message will be sent notifying the receiving district that the envelope is ready for download

14. Select **Send Envelope**

15. A warning message warns the user of confidentiality and to double check the correct database was selected. The transfer envelope is only available for a certain number of days. If needed, under setup the user with the proper security can extend for another 7 days. Options to recall the envelope and delete the envelope are also available.

16. Click **Utilities** in the menu at the top-left corner of the page

Notice the created date and time, who created the envelope and verification the envelope was sent with a date and time, which student and current status including expiration date.

Activity 14 – Receive a Transfer Envelope from Another District

When signing in as the system administrator or a user with proper permissions, a message will appear under messages, or on the user's My Home Page indicating the Student Transfer Package was received with steps on how to download the student documents.

Watch your trainer demonstrate how to process a transfer envelope received from another district.

17. From the top navigation menu, click **Administration** then **Utilities**

18. The Data Utilities menu option should be **Student**

19. From the Select Utility menu, choose **Receive Student Transfer Envelope**

Additionally, you can request a transfer envelope from another district who is also on PowerSchool Special Programs.

The Upload Individual Student Transfer Package File is used when the second option above is used and not directly transferring from one district to another from Special Programs to Special Programs through a secure link.

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20. Complete the upload by clicking on the magnifying glass next to the student's name

The next menu will ask if you want to use the ID that was assigned from the prior district or if the student has a new ID in the district currently enrolled. If the later, then enter the student's ID exactly.

21. Enter the student's ID

22. If a record already exists, which is likely if the student enrolled prior to receiving the transferred records, check **Allow merging of transferred documents into existing profiles**

23. Click **Import Student using Student IDs**

The system will confirm the import and date stamp when the file was downloaded.

24. Go to the student's profile by clicking the link for the status confirmation of the import

25. Select **Documents**

Notice the arrow next to the School Age IEP, which indicates the student's IEP can be added as a "live document," meaning it can be edited if not final or revised in cases where the document needs to be amended after the student transfers in to your district.

26. Click the arrow to open the live document

27. Go back to Documents and see that a new DRAFT document was created for the student allowing for editing and copying

28. Return to My Homepage

Audit Log

There are times when an administrator needs to view more granular details regarding activity that took place in Special Programs for both staff and students. The audit log is a detailed running list of all activities that took place with greater detail than in Events.

The audit log can be viewed from the staff or student profiles. The audit log in the staff profile details activities such as creating or editing that staff's profile or the activities that the staff performed on other staff profiles or student profiles and documents. The audit log in the student profile provides detailed information regarding activities on the student profiles and documents, including documenting all staff who accessed or edited the student documents and profile.

Activity 115 – View Staff Activities in the Audit Log

View the audit log for the staff user profile that you have been logged in under today.

29. From the top navigation menu, click **Search** and select **Staff**

30. Find the staff member you have been impersonating through the training today and click the Profile icon for the staff member

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31. Open the More menu and select **View Audit Log**

On the Events Affecting Staff Profile page, notice the information listed for the activity you performed on the staff profile.

32. At the top of the page, click **Events by Staff User** to access that information
33. To see a more robust audit log, search for the student assigned to you and click the student's Profile icon (contact card)
34. On the student's Profile page, open the More menu and click **View Audit Log**

Notice the audit log records the user who performed an activity, the date and time when the activity was performed, and a link to the document if the activity was performed on a document.

Scroll down the page to see the level of detail the audit log captures.

35. Return to My Home Page

Key Points

- Getting started – Navigate around Special Programs
- ADMIN and System Security Management – Differences in roles and security levels
- Managing staff security – Use the Assume System ADMIN role to switch from your administrator access to your system administrator access
- Integrations and Data Flow – Monitor integration activity and understand how data flows between systems and between documents and profiles
- Student and Staff Profiles – Manage Caseloads for users and monitor accuracy of Student and Staff Profiles through Utility features
- Data dictionaries, integrations, and data flows – Use data dictionaries and Data Flow Reports to help you understand fields and data flow in profiles and documents
- District Global Information – Maintain accurate system data and settings
- Audit Log – Manage user interaction with the entire platform through click logs