PowerSchool Special Programs: End Users Experience Part 2

This session will focus on special features available to process documentation and monitor student progress in PowerSchool Special Programs. You will explore additional processes such as creating amendments and the option to copy over from a previous document to ease data entry efforts and much more.

In this course, you will:

- Use document template functions and features
- Create and update Individual Education Plans (IEPs)
- Use advanced updating features
- View progress reports
- Finalize and print documents

Accessing Special Programs

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

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.

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 Special Programs administrators control the security groups and user access roles that specify what users can view and edit in Special Programs. You will have specific options and panels on My Home Page based on those security settings. 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.

Activity 1 – Sign in and Navigate to Special Programs

Sign in and navigate to Special Programs.

1. Sign in using the server and sign-in credentials provided by your trainer
2. Navigate to Special Programs as described above

   Special Programs My Home Page opens in a new browser tab.
3. Take a moment to look around Special Programs
4. Click the PowerSchool Special Programs logo at the top left corner to return to My Home Page

Accessing Student Documents

As a student moves through a Special Programs process, district staff use Special Programs to create documents that capture essential information at each stage of the process. Pre-referral, referral, eligibility determination, and Plans, are all examples of a document. Over a period of years, a number of documents can accumulate in a student's document history, and all these documents are organized by year and category so that they are readily accessible by appropriate staff.

With Special Programs, each type of process-related document, such as a referral or plan, is created from a template that specifies the design and layout of documents of that type. For example, referral documents are created from a referral template, and plan documents from plan templates. The templates are customizable, and new templates may be added to implement other processes employed by the district.

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There are multiple ways to navigate to the documents section of Special Programs. Selecting the icon that looks like a piece of paper next to the student's name when searched is one way to go to the document section for a student. Another way to access documents is if already in the student's profile, users can just select the Documents option on the top of the screen.

Once in the student's document section users with permission to create documents can select from the drop-down menu to select the document they want to create. Other documents that might appear in the student's document section could be documents uploaded into this section as file-based documents, typically as PDF files. Users with access to the student can open the document, which will open in a different tab in their browser.

Activity 2 –Access Student Documents

Navigate and explore the Dylan Dottore's Documents section.

1. From My Home Page, under Quick Access, enter the name Dylan Dottore
2. Next to the student's name, click the Documents icon that looks like a piece of paper to navigate to the student's documents

Document Template Features

Creating Basic Documents (example Referral for Evaluation)

Documents in Special Programs are grouped by module. Security is set in security groups that define the roles and responsibilities of the members who will be added to the security group. After accessing the documents section of Special Programs, the Create New Document menu will appear for all users who have permission to create documents. Each document is made up of different field types and functions to guide and assist the user with completing the necessary documentation for the student. Regardless of the module, the core functionality and the steps to create and edit or change the status of documents are the same, however some are much more complex than others.

To create a document for a student, use the Create New Document menu on the Documents page to access the list of available forms, then select the appropriate form and click **Go**. Enter a label/comment to describe the reason for creating the document. If the document has multiple sections that are not required for all students, you may need to select the sections that need to be included for the selected student.

Activity 3 – Create a Document

Create a Referral for Evaluation document for a student from your My Students table

1. On your student's Documents page, open the Create New Document menu and under Forms for Multiple Processes, select **Referral for Evaluation**, then click **Go**
2. In the New Referral for Evaluation window, enter the label **`Practice_LastName`**, uncheck the option for Document Delivery and click **New**

   A new Referral for Evaluation draft document is available to edit for this student.

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Types of Data Fields

Not all documents will use every data field type, but there are a variety of field types available in Special Programs. See the list below for a partial list of data field types:

- Character – Text field that allows up to 400-character length typically are displayed as a single row of entry in document templates
- Date/Date and Time – allows users to enter Dates or Dates and Times
- Keyword Reference – Limits the user to only select the option in the keyword table linked to the data field

  Sometimes the configuration allows users to select "other" and when selected displays a character field for data entry.
- Profile Reference – Used to search for information already stored in a profile (such as Staff or Locations)

  Sometimes the configuration allows users to switch between a profile preference (look-up) or a character data type (non-lookup). Look-up fields provide a list of values to choose from. You enter text in non-lookup fields.
- Logical – Sets to True or False and visible in two ways:
  - Multi-Option – Two checkboxes, one checkbox for True or Yes, and another checkbox for False or No
  - Single-Option – One checkbox, checked is True and unchecked is False

Additional functionality:

- A field highlighted in red represents that the field is required and any empty required fields will result in failure to complete the section or finalize the document
- Document and section actions will guide users through a workflow or provide data validation which will display errors or warnings if the system identified an issue with the data entered
- Repeating rows are rows of data where a user can add as many rows of data as needed. The user clicks the + plus sign under the last row to create additional rows.

Using Save Options

- Save, Done Editing: Saves your work and looks for incomplete data or errors on the document section

  When the document is complete and meets all of the section error checks, the document will no longer be in edit mode. You can also save and navigate away from the document or section even if the document is not complete.
- Save, Continue Editing: Saves your work and stays on the page

  Save, Continue Editing does not allow you to go to another document or section.

- Cancel Editing: If the document has errors after attempting to save the document, but you need to print the document or use other features, use this option to leave edit mode

Activity 4 – Fill Out and Save the Referral for Evaluation Document

Use what you've learned so far to complete the Referral for Evaluation document for your student given the specifications in the scenario:

Student A has just transferred into your school from another state. The parent is adamant that the child was "in the process" of getting an IEP when they had to leave. They have paperwork showing that the child had been referred for evaluation based on their poor progress in reading as well as their inability to follow directions. So far, the student has missed 5 days since their enrollment 23 days ago. The teacher says the child is very lethargic after lunch and claims they used to have to go to the clinic to take medicine after lunch at their old school.

1. On the Documents page for your student, select the draft Referral for Evaluation document you created in the last activity
2. For Date Received, click the calendar icon and select today's date
3. Work your way through the highlighted boxes by filling in information that matches the scenario. If no information is provided, you can fabricate it.
4. Click **Save, Continue Editing**
5. Click **Cancel Editing**

   Now you should no longer see the save options at the top of the page and you are no longer in edit mode
6. Use the breadcrumbs to return to the student's Documents page

Finalizing a Document

After saving a document and leaving the edit screen, 5 drop downs will appear at the top of the screen. Each drop down has a different functionality

- Edit This Section – will take the user back into edit mode for the document
- Set Document – allows the user to include or remove certain **Sections** from the document, move status of document from **Draft to Review** or **Draft to Final**, and change the **Label or Comment** attached to the document title
- Print – user can print individual sections or multiple sections at a time
- Navigate To – user can access the **Student Profile**, **Events** related to the document, **File Attachments**, and the **Audit Log** to see all changes
- More – allows the user to access multiple functionalities including **Spell Check**, **Send a Message** with the Document to other users, **Modify** the document, and depending on security, **Delete** the document.

Documents have three different status types:

- Draft: When a document is created, it is automatically set to DRAFT. Users with Draft edit permissions can complete the document when in this status.
- Review: Based on the workflow, documents in the Review status can be reviewed by another person before setting the document to the Final status. The Review status is optional and the security can be set on each individual document.
- Final: The Final status is the last status in the process. Once a document is set to Final, most of the document is locked down and unable to edit. Some special fields may be set to edit after a document is finalized. Any data that is set to flow to the profile will do so when the document status is set to Final.

When a user changes a document's status, the user can add a comment that is viewable by staff using Special Programs but the comment will not appear on the printed copy of the document. Users can also send a message to staff to inform them of the document status change. The message will appear on each user's home page under Unread Messages and the message will include a direct link to the document.

Printing Documents

After a document is finalized, the Print menu appears at the top of the document. With documents with more than one section, you will see three options available:

- Print this Section: Prints only the section currently viewed. To print another section of the document, navigate to the section and then use this option again.
- Print Selected Sections: Choose which sections to print.
- Print All Sections: Prints all main sections but does not print other sections.

Using the Revision Feature

There are times when it is necessary to create another document for the same process, but the content needs slight modifications. If the revision feature is set, a user can revise the document to amend information without having to re-enter all of the information.

To revise a finalized document with the revision feature:

1. View a finalized document
2. Open the More menu and select **Create Revision of This Document**
3. In the window that appears, enter a label or comment to describe the purpose of the revision, then click **OK**

   The system creates a duplicate copy of the original document.
4. Depending on how the document is set up, you may need to select **Edit This Section** to make modifications

When the revision feature is used, the system automatically adds a link to the original document under the heading Preceding/Original Document. A pencil icon will appear next to the sections that are revised.

Activity 5 – Revise the Primary Phone Number on the Referral for Evaluation

Amend the referral for Evaluation to reflect the following scenario:

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The Parent called to inform the school of a change in phone number. The Primary Phone number is now 555-867-5309.

1. Open the Referral for Evaluation for the student you were assigned
2. Open the More menu and select **Create Amendment to This Document**
3. Enter the comment **`Amendment:Practice_Lastname)`** and click **OK**
4. At the top of the page, click **Edit this Section**
5. Change the phone number to 555-867-5309.
6. Select **Save, Done Editing**
7. Open the Set Document menu and select **Status from Draft to Final**
8. Enter comments, such as **`Parent called and needed to update phone number for this meeting`**
9. Select the staff name listed after Invite Contact Name
10. Click **Accept**
11. For the confirmation message, click **OK**
12. Use the navigation path to go back to the student's Documents page and verify that the Preceding/Original Document column appears with a link to the original document for the revised document row

Accessing and Creating Events

For each student, Special Programs maintains a chronological running history of any specific actions taken or events that occurred during the Special Programs process. Events are logged by the user signed in when each event occurred, the date and time the event occurred, and links to any applicable documents.

There are two types of events: auto events and manual events. Auto events are created each time a document's status changes. Events can also be manually created by users with the proper permissions. The event system is integrated with the communication system so that when events occur, appropriate users can be notified of the events through the messaging system.

When viewing a student's profile or documents, select **Events** at the top of the page to access the Events information.

Activity 6 – Access and Create an Event

Create a manual event for your student to reflect that the Parents called to confirm they would be attending the upcoming IEP Meeting on March 5, 2020 in which we will review the Referral for Evaluation.

1. From the Student's Documents page, select **Events**
2. Review the Auto Events created by the system logging the finalization of the Invitation documents
3. To create a manual event, click **New Event**

4. In the Event Description, enter the text of the event, such as **`Parents called to confirm they would be attending Initial IEP Meeting`**
5. Open the "Link event to document" menu and select the latest Invitation to a Meeting document
6. Click **Staff** to open the Select Staff window and click the link for the staff name that appears at the top of the window next to Recently Selected Staff
7. Click **Close** to return to the New Event page, then click **Accept**
8. Navigate back to the home page and verify that you received a message under Unread Messages

Document Template Features Continued

Creating Complex Documents with Multiple Sections (example IEP)

The process to create documents and enter data is the same across all modules and documents. However, some documents have more features and functionality, depending on the content required. Some documents have multiple sections that you can navigate between by using a fly-out menu.

Activity 7 – Create a New Document and Navigate Sections

Create a new Individual Education Plan (IEP) document for your assigned student and navigate document sections.

1. While in the Documents page for your student, open the Create New Document menu and under Special Education, select **Individual Education Plan**, then click **Go**
2. On the New Individualized Education Program Setup window that appears, enter a label/comment **`Practice_LastName`** and click **New**
3. Navigate to the IEP Team Meeting Participants section of the IEP by clicking the right-facing arrow at the top of the page
4. Return to the IEP Cover Page by clicking the left-facing arrow

Long Text Data Fields

Long text data fields can hold a virtually unlimited character length and often have different features associated with them. Not all features are used for every long text data field, but here is a list of features that a user could see:

- Enable Stylized Text: Display a formatting toolbar to format text entered into a long text box.
- Statement Banks: Develop your own personal pre-entered statements and insert them into any documents you create. If your Special Programs database is configured to allow sharing of statements, you can also submit your personal statements to be included in the public library of statements.

- Speak-to-Text: Users speak into a microphone and the audio converts to text in a long text data field.
- Spell-Check: Spell check the content entered into the long text data field. Spell-Check is also available at the document and section level.

Activity 8 – Private Statements Bank

Add a statement to your private statements bank and use it on a document.

1. On the Student Profile Cover Page section of the Individual Education Plan, find the Strengths long text data field
2. To open the Statements Bank window for the Strengths field, click the Insert from Statements Bank icon that looks like three horizontal lines and a blue arrow
3. In the Statements Bank window, open the Owner menu and select **Personal**
4. Click **Edit Statements**
5. Click the macro **{FirstName}**, then complete the statement by entering **`has shown significant improvement.`**
6. To spell check your statements, click the Spell Check icon (the ABC and checkmark)
7. Select **Accept**
8. Click **Save Statements**
9. Close the Statement Banks window by clicking **Close** at the top right corner
10. For the Strengths field on the Student Profile Cover Page section of the IEP, click the Statements Bank icon and select the statement from the personal list

    You can tell a statement is selected when the statement appears with strike-through text.
11. Close the Statements Bank window
12. On the PLAAFP School Age section of the IEP, click **Save, Done Editing**, then **Cancel Editing**

    Note the statement now shows the first name of the student.

Repeating Sections

Much like repeating rows, there are areas within some documents where a few sections of data are needed, or many different sections of the same type of data are required. Special Programs utilizes repeating sections for this purpose.

To use the repeating sections functionality, go to the main section where repeating sections appear and on the top of the page, locate the drop-down menu that manages the repeating section.

For example, in the Goals and Objectives/Benchmarks section of the IEP, here are the options in the Goals and Objectives/Benchmarks Setup menu at the top of the page for managing the repeating section:

- Add New Subject: Adds a new blank section.

- Insert New Subject: Inserts a new blank section and positions it before the section currently on the screen.
- Duplicate Subject: Makes a duplicate copy of the section on the screen to allow for editing, if minor changes are needed.
- Shift Subject Up: Shift up moves the section on the screen to an earlier position, this will only be available if the move is possible.
- Shift Subject Down: Shift down moves the section on the screen to a later position, this will only be available if the move is possible.
- Delete Subject: Deletes the section on the screen, the later sections will move up to and renumber as appropriate.

Progress Monitoring or Reporting

Within the documents, and particularly within student plans where progress monitoring or progress tracking is needed, there is an option to determine if the progress will be tracked through Progress Monitoring (graph) or Progress Reporting (text). In many cases, this feature requires the document to be finalized in order to report progress.

Activity 9 – Create a Goal in the IEP and Duplicate the Goal

Create 2 goals for your IEP. Align one of them to Language – this goal we will progress monitor through text entries. Create a second goal for Math – this goal we will progress monitor through a graph. We have decided that Student A has a goal of mastering 85 multiplication facts in 5 minutes. During the initial measurement on January 6, 2020, Student A could only master 40 multiplication facts in 5 minutes. Once you have written both goals, save this section because we are done editing their goals.

1. In the Individual Education Plan for the student assigned to you, navigate to the Annual Goal section
2. Independently complete the fields on the Goals and Objectives/Benchmarks page
3. At the bottom of the page, select **Progress Reporting (Text)**
4. Click **Save, Done Editing**
5. At the top of the page, open the Goals and Objectives Setup menu and select **Duplicate Subject**
6. At the bottom of the second Goal, select **Progress Monitoring Graph**
7. Enter the 4-points of data required:
    a. Baseline Data Point (integer): How is the Student currently functioning? (Enter `40`)
    b. Targeted Level of Success (integer): Based on the Goal, what is the Target Success? (Enter `85`)
    c. Initiate Monitoring: Date when monitoring for this Goal will begin (Enter `01/01/2019`)
    d. End Monitoring: Date when monitoring will end, when is the expected date the student is expected to meet the goal? (Enter `12/31/2019`)
8. Click **Save, Done Editing**

9. Navigate to the Progress Report section of the IEP to see how to navigate between progress reports
10. Click **Save, Done Editing** and navigate to the 2nd Goal to review the progress monitoring Graph
11. Watch the trainer demonstrate how progress monitoring and progress reporting work after a document is finalized

Attaching a File to a Document

Files can be attached to unfinalized documents or finalized documents depending on the user's permissions. This is helpful for uploading scanned documents so all documentation can be stored in one place electronically.

- File-Based Documents are separate documents that do not support a document template.
- File Attachments are documents that support the document template and are attached to the actual document template with the same permissions as the document template.

Key Points

- Getting Started – Access and navigate Special Programs
- Document template features – Use templates to create, save, revise or copy, finalize, and print documents
- Accessing and creating events – Provides audit trails for document status changes or manually entered event information such as meeting updates
- More navigation and data field types – Access multiple sections of a document, use repeating sections, long text data field features, progress monitoring and reporting

