



Detail Discussion of Form B

Purpose: Dist. Administration - PowerSchool provides a data collection form ("Form B") that summarizes many of the decisions you will be asked to make in setting up each school in your district. Each decision is discussed in more detail below.

School Setup

Review Implementation Form B

Log in: Log in to PowerSchool using the ID and password.

School Setup:

Now that your schools are setup at the District Office, you will need to give your account access to switch to them.

On the start page, choose "Staff" from the main menu. Click the letter that corresponds with the first letter of your last name. If you are the only user in the system, your account will be displayed. Otherwise, you will need to select your name from the list.

Click the "Security Settings" link on the left menu.

The "May Switch To" list will now contain the school(s) you created at the District Level. Check each one so that you can access the individual schools. After checking each school, click "Submit" at the bottom of the page.

Click the PowerSchool Logo in the top left are of the screen to return to the start page.

On the start page, select the "School" link at the top of the page. From the "Change Schools" menu, select one of the schools you set up in Step 6. From the main menu under Setup, click School.

Scheduling:

1. Years and Terms: Define the school year. Changing the dates of your School Year and Terms after you've created them in PowerSchool is not recommended, so you may want to extend the last day of school to accommodate make-up days, such as "weather days." These additional days will be counted as "not in session" days on your calendar initially, but will be available if you need to use them for in-session days.

Once the school year is created, you will see a link entitled "Edit Terms." Click this link to display the "Term Setup" page. Define the individual terms within the school's calendar year (i.e. Semesters, Trimesters, Quarters, etc.) by clicking the "new" button and creating the sub terms. When defining the individual terms, define the longest and most current term first (i.e., if your



school uses semesters and quarters, define semester 1 first, then semester 2, then quarter 1, then quarter 2, etc).

Note: Best practice for defining Terms: Do not leave any gaps between your terms. For example, if Semester 2 starts January 11, enter January 10 as the end-date of Semester. This will give your district the maximum possible time to submit grades at the end of a term. If you do not know the dates of your school's calendar year, do not enter them now. It is difficult to change the calendar dates once they have been set.

On the Years & Terms page, click the name of the year. Set the maximum number of periods that will meet on any one school day and the number of unique cycle days in your calendar. If you are unsure of the number of periods and days, work with your Implementation Specialist to determine this information.

Note: If students can cross-register at other schools (for example, a student at one high school takes a class at another high school), click [here](#) for more information on setting up terms.

After creating Years and Terms and setting the number of Periods and Days, select "Term" at the top of the page. The Change Term page appears. From the "Change to" menu, select the year you just created. This step is important; it will ensure that any term related setup items are linked to the correct school year.

If you wish to import students' historical data, you must create years for this as well. When entering these "historical" years create the most recent year first and then create the prior years in descending order.

2. Days: Define schedule day names for the current school year. On the Cycle Days page, the default day is named "A" and subsequent days are named in succession. Click the day name to either rename the day or add an abbreviation for the day using a maximum of 3 letters. Later, you will associate each school day on your calendar to one of these days so that PowerSchool can calculate attendance for reporting purposes.

3. Periods: Define period names for the current school year. On the Periods page, the number of periods entered when setting up years and terms appears. The default period is named "P1" and subsequent periods are named in succession. Click the period name to either rename the period or add an abbreviation for the period using a maximum of 3 characters. Periods at a high school will probably represent a period of time during which a class is taught. At elementary schools, these could be placeholders for a section to allow a teacher to give a grade or enter attendance. (Further information on elementary school attendance and period setup can be downloaded from the following link: [Elementary Best Practices](#).) Periods can be in either alphabetical or numerical format. All periods appear on each student's schedule.

4. Next School: Enter options to display when promoting a student to a next school. The current school should be listed to accommodate students being promoted from one grade level to the next. Enter any schools that a student leaving the current school could potentially be promoted to, such as students from an elementary school being promoted to middle school.



5. Rooms: Enter the room and description of the rooms where sections (classes) are held. These room values will be referenced on the Section import file.

Attendance:

Click on the following link for an [Attendance Method and Conversion Decision Tree](#).

1. Preferences: The Attendance Preferences page can be used to specify general attendance preferences.

2. Full-Time Equivalencies: FTE codes allow us to specify different ADA(Average Daily Attendance) conversions for different groups of students. For Example: In a K-8 school, eighth grade students attend six sections a day for an ADA value of 1. Kindergartners are required to attend two sections to earn the same ADA value of 1. You would want to setup an eighth grade FTE and a kindergarten FTE. At least one FTE must be setup per school. You will need to specify the default attendance and conversion method for each FTE code you setup.

3. Attendance Code Categories: Attendance Code Categories are used to group attendance codes by classification for reporting purposes. You must set up attendance code categories before taking attendance in either PowerGrade or PowerSchool. Once you have created attendance code categories, you can create attendance codes.

4. Attendance Codes: Set up attendance codes to be used by teachers and the attendance clerk. PowerSchool requires that these codes are single-letter codes to maintain data integrity. If there are multiple schools on your server, it is recommended that you use uniform codes from school to school.

5. Attendance Conversion Items: Set the parameters for attendance reporting. The daily attendance value is calculated according to the conversion values set here. On the Attendance Conversions page, click New to set a conversion value. Enter the number of periods needed to account for a portion of the day. For example, four periods represent one half of an eight period day. At elementary schools with two attendance periods, one period absent or present can represent one half of the day, whereas two periods absent or present can represent the whole day. The school policy and your state reporting requirements will dictate how you set attendance conversions.

Calendaring:

1. Bell Schedules: Bell schedules are associated with each school day on your calendar so that PowerSchool can calculate attendance for reporting purposes.

A bell schedule defines which periods meet on a given day. For example, if all periods meet for the same length of time every day, you may only want to set up one bell schedule. However, if not all periods meet every day, you will need either a bell schedule or a day for each variation. For example, if period 4 meets only on Mondays, Wednesdays, and Fridays, either set up two bell schedules or two days: one for M/W/F (which includes period 4) and one for T/Th (which



does not include period 4). How you set this up depends on the complexity of your schedule and the size of your district. Accommodating multiple days and multiple bell schedules can be done a number of ways. Your Implementation Specialist can assist you with your specific needs.

You may also choose to set up bell schedules for shortened or early-release days, even if those days have the same periods as a normal day and only the start and end times differ. This is to help your district track attendance and the number of instruction hours by the minute and it makes your PowerSchool calendar easier to read.

When creating bell schedules, include each period in which attendance could be taken in at least one schedule type. To set up bell schedules, you will need to know which periods meet for attendance on specific days, and you will need to know the beginning and ending times associated with that period. For example, bell schedules could include "A" for a normal school day, "B" for a shortened day.

2. Calendar Setup: Using the information from the previously created "Years and Terms," "Days," "Bell Schedules," and the district's "Calendar Membership Types," you can now set up your school calendar. The checkboxes labeled A through F represent "tracks," which are primarily used by year-round schools. Another use of tracks is to identify students whose attendance requirements are different from other students at the same school, such as an elementary school where Kindergarten does not meet every day. For more information on setting up tracks, [click here](#).

For each day on your calendar, select the "In Sess" checkbox for all days that count toward average daily attendance (ADA). If a day also counts for average daily membership (ADM), enter 1 in the "Memb Value" field. If students are not in session and the day is not to be counted for ADA/ADM, deselect the "In Sess" checkbox and enter 0 in the "Memb Value" field. If students are not in session but the day is to be counted towards ADM (for example, in states where certain holidays count towards membership), deselect the "In Sess" checkbox and enter 1 in the "Memb Value" field. Verify each day on your calendar, ensuring the appropriate checkboxes are selected. Click Submit before moving to the next month; if you do not click Submit, your work on that page will be lost.

After setting up your calendar, it is recommended that you verify the number of days in the current term. At the bottom of each calendar page, click "Verify # of school days in the current term." This calculates the total number of In Session days for the term.

3. Reporting Segments: Use reporting segments to run a report for date ranges that do not match a calendar month or terms set in "Years and Terms." For accurate results, reporting segments must fit within a school year and have no school days missing between adjacent segments.

General:

1. Activities: When creating activities, you are creating entries to display on a student page that includes each activity and a corresponding checkbox. If an activity's checkbox is selected for



an individual student, that student participates in that activity. You can then search for students based on their participation in an activity to perform functions such as marking attendance, printing lists, and generating mailing labels.

2. Balance Alert: Create an alert that appears on the student pages when either the lunch or fee balance falls below a specified dollar amount. Emails may also be sent to parents who choose to receive balance alert emails.

3. Fee Types: Fee types serve as the second tier within the Fees Management structure. For each fee category created, you associate (create) fee types. Fee types created using the fee category of School are called school enrollment fees and are automatically assessed at the school level when students enroll in a school. Fee types created using the fee category of Course are called course enrollment fees and are automatically assessed at the course level when students enroll in a course. Fee types created using fee categories other than School or Course are called student fees and are assessed manually. Click New to create a new Fee Type. Additionally, you can use the Priority field to indicate the order by which a payment/credit is to be distributed against/towards a student's fee balance. Priority values can be from 0 to 99. Zero (0) is the highest priority.

Once fee types have been associated (created) under the fee categories, you can return to District setup and create school enrollment fees in Schools/School Info. After Courses are created/imported, you can create course enrollment fees.

4. Miscellaneous: Select appropriate settings on this page. The "Default term level" refers to the term segment that appears at the top of each page in PowerSchool.

5. Sub Login Settings: Substitute teachers can use PowerSchool to enter attendance and lunch counts through PowerSchool Substitute, a special page designed for substitute teachers (found at "[yourserver]/subs" instead of "[yourserver]/admin"). If you plan to use PowerSchool Substitute at your school, create a password for the substitute teachers. If you select the checkbox to include the current date, the date is included as part of the password; therefore, the password changes daily with no maintenance required.

If you plan to use PowerSchool Substitute, consider how best to communicate this information to substitute teachers at your school. More information and substitute considerations are suggested in [Working With the System: Recommended Procedures for a District to Consider](#).

Grading:

1. Class Rank: If your school uses Class Rank, establish the class rank method based on a GPA calculation method. Indicate how often class ranks should be recalculated, such as weekly or only after storing grades.

2. Comment Bank: Create district-wide comments to be included in a comment bank. Teachers can select comment bank codes when entering comments in PowerGrade. If you require



teachers to use the comment bank rather than entering their own free-form comments, communicated this to the teachers.

3. Final Grade Setup (PowerGrade): Create a term for every final grade a teacher gives in PowerGrade. In PowerSchool, a final grade is any grade that appears on a report card and not just the grade at the end of the year. Most often, these will be the same dates and terms as you previously created in "Years and Terms." If a class is being taught for an entire year, there can be multiple final grades. For example, your school might have four one-quarter grades and two semester grades in addition to an annual grade. Each of these final grades needs to be set up inside the year term.

4. Current Grade Display: Indicate which final grades parents and students using PowerSchool Parent Access can view. Specify which type of grade should display for each store code, and whether a citizenship grade should also appear.

Setting up final grades is an essential step in order for teachers to be able to access their grade books using PowerGrade.

5. GPA Student Screens: Indicate what type of GPA calculation to display on the Cumulative Info and Quick Lookup student pages. For example, select Simple or Weighted Percent from the pop-up menu.

6. Honor Roll: If your school generates an honor roll, establish the method for including students. Honor roll can be based on grading, behavior, or attendance.

Graduation Requirements:

Note: Settings in this section are not required to initially set up PowerSchool.

If your school wants to track student graduation progress using PowerSchool, you may want to consider setting up graduation sets. A graduation set is a group of course requirements in which students must earn a specified number of credits. For example, you may have a set of requirements to graduate or you may track the state university's entrance requirements, which may differ from your school's graduation requirements.

Use graduation sets to monitor a student's progress towards graduation from your school or entrance to a higher education institution.