PowerSchool SMS 8.0

Administration Manual

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PEARSON

Preface

This document is a reference for the user of a school district's or PowerSchool SMS® system, including the following types of people:

- *District Administrator*: Configures and maintains the PowerSchool SMS system for a district. This involves setting up district-wide information, setting up system users and their roles, setting information standards for all schools, setting district and school boundaries, adding schools to the district and setting them up, setting up programs, configuring year-end reporting, and defining how schools operate. Typical District Administrators hold such positions as IT manager, data analyst, database manager, assistant superintendent. see also *Base roles* [p. 246]

- *District user*: Uses the PowerSchool SMS system at the district office level. This involves such tasks as registering new students, validating addresses, enrolling students in schools, tracking immunizations, reviewing student information, Year-End Procedures, and assembling student information for various administrative purposes such as year-end reporting.

- *School Administrator*: Maintains the PowerSchool SMS system for one or more schools in the same district. This involves such tasks as scheduling courses and classes, configuring grading, enrolling students, assigning teachers, validating addresses, tracking immunizations, adjusting student information, and assembling student information for various administrative purposes. A School Administrator may do this work for more than one school. Typical School Administrators hold such positions as school IT manager, vice-principal, office data specialist. see also *Base roles* [p. 246]

- *School user*: Uses the PowerSchool SMS system in one school. This involves such tasks as taking attendance, entering grades, and reviewing student information. Typical school users hold such positions as teacher, office secretary, vice-principal, counselor, nurse, clerk and office assistant.

- *Technician:* Involved in general system maintenance [>>], including the installation, upgrading, and data management.

Note: This document may describe some tasks, processes, and features that are not available to your role [p. 12].

What's new in PowerSchool SMS 8.0

This section describes new capabilities in PowerSchool SMS 8.0.

User interface

- The PowerSchool SMS interface has new colors [*Figure 6*], an altered layout, and a more efficient menu system.
- PowerSchool SMS uses color to distinguish more clearly the Active Calendar from the Planning Calendar [p. 171].

User roles

- You can change to another role more easily [p. 12].

Course requests

- The School Administrator can specify which of a student's contacts can approve that student's course requests [*Table 13*].

School setup

- You can change calendars more easily [p. 171].

Registration and enrollment

- The process of registering and enrolling a student is more streamlined. As part of the process, PowerSchool SMS scans the system for potential duplicate students [p. 141] and you can assign contacts to the registrant.
- When you try to enroll a student who has behavior enrollment restrictions, PowerSchool SMS prevents the enrollments and displays a warning.
- When you try to enroll a student who is under the minimum age, PowerSchool SMS displays a warning.
- When you try to enroll a student in an out-of-zone school or in a school where program management is employed, PowerSchool SMS sets the enrollment to "pending" [p. 149].
- Rather than transferring a student mid-year by selecting Transfer Students from the Actions menu, you withdraw the student from one school and enroll that student in the other [p. 146].
- You can view and manage a student's enrollments more efficiently [*Figure 86*].
- A District Administrator can specify which fields are required and add custom fields [p. 267].
- For District Setup purposes, PowerSchool SMS provides a dedicated Registration and Enrollment preferences page [p. 267].
- PowerSchool SMS stores enrollment data as records with start and end dates (rather than as a collection of status codes).
- New permissions control aspects of registration and enrollment: *Add Students permission* [p.765], *Delete Student from district permission* [p.773], *Registration and Enrollment Preferences permission* [p.655].

Contacts

- PowerSchool SMS displays more information about contacts [*Table 13*] [p. 56] [p. 59]. Information displayed includes each student's emergency contact, communication methods, pickup rights, custody, and course request approval status.
- For a contact, you can record new information, including new communication methods such as an e-mail address and a Facebook URL, a permission-to-pick-up phrase, and the nature of the contact's relationship with the student [p. 64].
- You can click a contact's e-mail address to start composing an e-mail.
- You can link a student's sibling to that student as a contact [p. 68].

- You can link any contact stored on the system to a student as a contact [p. 64].
- When adding a contact to a student, PowerSchool SMS identifies potential duplicates [p. 64].
- You need record a student contact only once and then it is available to associate with more than one student [p. 64].
- When you record a new contact, PowerSchool SMS scans the system for potential duplicates [p. 64].

Scheduling

- The School Administrator can see which user made a change to a student's schedule [].

Product name change

- For version 8.0, the product name Chancery SMS is changed to PowerSchool SMS. Since references to Chancery SMS might persist in the product or these documents, the reader should consider these names equivalent.

Server support

- For its Web and Database Servers, PowerSchool SMS now supports Windows Server 2008 R2 64-bit [p. 395].

Note: The ability to run Year-End Processing [p. 450] is not available in this version of PowerSchool SMS.

Getting help with using PowerSchool SMS

If in the course of your work, you need information on some aspect of the system, you can get that information quickly. You can get detailed information on PowerSchool SMS in general or access to a user support web site.

To get information on the page currently displayed:
1 On the page, click the **Help** menu.
2 Click **Dynamic Help**. The relevant page in the *PowerSchool SMS 8.0 eDocs* appears in your web browser.

To get information on PowerSchool SMS in general:
1 On any page, click the **Help** menu.
2 Click **Contents**. *PowerSchool SMS 8.0 eDocs* appears in your web browser.
    - You can find specific information using the table of contents or index, or by text search.
    - Some documents require the use of Adobe Acrobat Reader (http://get.adobe.com/reader).

To view the user support site:
1 On any page, click the **Help** menu.
2 Click **Support Website....** The login page opens in your web browser.

- For access to https://support.powerschool.com, you must have a User ID and Password issued by your organization. The User ID determines the services to which you have access.

Getting technical help

For assistance with technical aspects of a district's PowerSchool SMS system, such as installation [p. 403], upgrading [p. 417], and data management [p. 380], consult the personnel assigned by the district to the task of troubleshooting or training. Also, the district may provide a user support web site or printed reference materials.

As a further source of assistance, we offer several user support options, which are available by subscription (that is, to personnel within an organization that has a support agreement with us in place). Options include access to a technical support engineer and access to our user support site: https://support.powerschool.com. The support site contains information and services such as a knowledge base, user forums, technical bulletins, downloads, documentation for older PowerSchool SMS versions, and tracking of support incidents set up by support technicians.

To consult a support technical support engineer:

Telephone 866-434-6276.
- Telephone service is available Monday to Friday, between 5 am and 5 pm Pacific Time.
- Or email psstechsupp@pearson.com

Training

For the District Administrator or Technician, training may be an appropriate means of learning how to work with a PowerSchool SMS system. Experienced users interested in mastering new aspects of a system may also benefit from in-depth information and proven techniques that training provides.

Training programs on PowerSchool SMS are available from Pearson in several formats, including on-site and live online. Also available is custom training designed for a specific district's system.

For details, send an email to proded@pearson.com, call 800-999-9931, or consult the Training area at https://support.powerschool.com.

Contents

Introduction

PowerSchool SMS is a software tool for managing student [p. 37] and staff information [p. 215] and activities in a school district and its schools. A typical PowerSchool SMS system is used for a large public urban district with many schools, both elementary and secondary, serving grades in the K through 12 range.

About PowerSchool SMS

A PowerSchool SMS system operates from one or more servers running in a central location. Users connect to the system using a web browser [p. 31] on a personal computer, which connects through a local network, a wide-area network (WAN), or the Internet [*Figure 1*].

Figure 1: Access to a PowerSchool SMS system
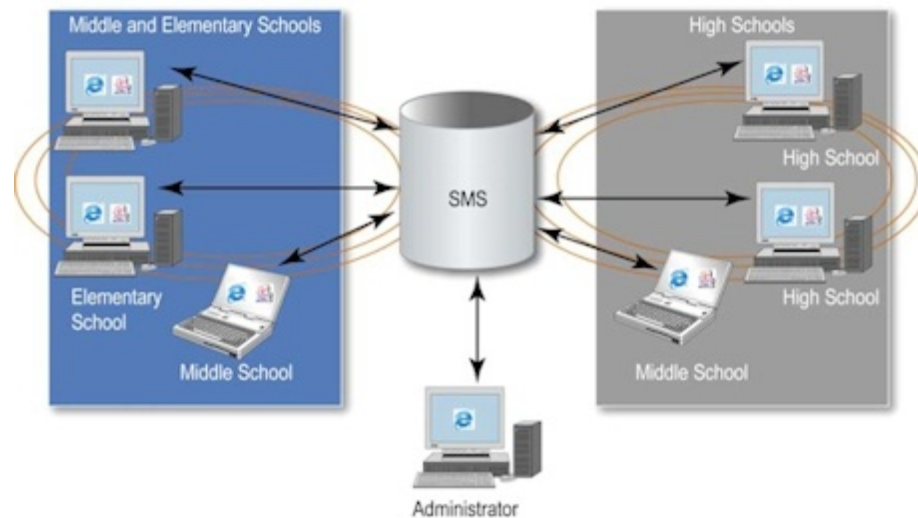
A typical PowerSchool SMS system is large and used by many different people for different purposes. For reasons of security and system integrity, each person's access to the system is limited to the information and tools that person needs to do their job. For example, a School Secretary can view student information for one school and enter attendance figures, whereas a District Administrator can view all students in the district, register new students, and define how the system automatically assigns student numbers.

A default PowerSchool SMS system has a set of standard pages and data (also known as *core pages* and *core data*). In general, this document describes such a system. Whereas the actual system on which you work may be subject to modifications. Such customization [p. 472] is undertaken by technicians and District Administrators to meet the requirements of a particular district and its schools. The PowerSchool SMS *cTools* feature enables customizers to modify standard pages and add new pages. Also, once a system is in operation, a District Administrator may have some ability to modify the

system, such as by adding choices to fields via setup lists, adding new pages, and linking such pages to the control bar.

A PowerSchool SMS system can also operate in conjunction with other systems, such as the following:

- *PowerTeacher*™: Our web-based gradebook that enables teachers to record student grades without being connected to the PowerSchool SMS system. These grades are periodically synchronized with the PowerSchool SMS system.
- *ParentCONNECTxp*™: Pearson's web service that enables a student's parent to view school-based information about that student [p. 167] and enables a student to submit course requests [p. 231].

Getting started

You get access to PowerSchool SMS by using a web browser such as Internet Explorer® or Safari®. You sign in [p. 10] to a web page that is set up for use across your district. Each web browser *page* gives you access to information that is stored in a central location on the network.

Signing in

To work with PowerSchool SMS, you must first sign in to your district's system. For this purpose you need:

- A *User ID*
  The User ID matches a user account [p. 236] and determines the role(s) [p. 12] to which you have access. A User ID is provided by the system's administrator. On some systems, the ID's prefix is a domain name and the ID matches your domain login ID.
- A *Password*
  This is provided by the system's administrator for use with a User ID. It is case-sensitive. On some systems, the password is identical to the domain login ID. The user can change his or her own password [*Figure 3*].
- The web address of the district's PowerSchool SMS system.
  Also known as a *URL*, this address is provided by the system's administrator see *System maintenance & setup* [p. 378]. An example is "http://DistrictServer/PowerSchoolSMS/User/Login.aspx".

To sign in to PowerSchool SMS:

1 On your computing device, open a web browser.
2 In the browser's **Address** field [*Figure 2*], enter the web address of your district's PowerSchool SMS system.
   - Once you have entered the address in the web browser, consider adding it to your list of favorites so that you can return to it without typing.
3 Press the `Enter` key. The PowerSchool SMS Sign In page opens [*Figure 3*].
   - This page displays the version number of the PowerSchool SMS system software [*Figure 3*].

4 Enter a **User ID**.
- The User ID field is not sensitive to case.

5 Enter a **Password**.
- The Password field is sensitive to case.

6 Click **Sign In**. The *home page* appears [p. 15].
- If your user account has more than one role and you have not yet chosen a default role [p. 245], the Choose Role dialog appears. Select the default role that you would like to enter automatically each time you sign in.
- Caution: For a District Administrator to sign in as a school-level user, that administrator's user account must have an appropriate role [p. 240] AND a staff record at that school [p. 215].
- You can switch roles while staying logged on [p. 12].

Figure 2: Web browser: Address field
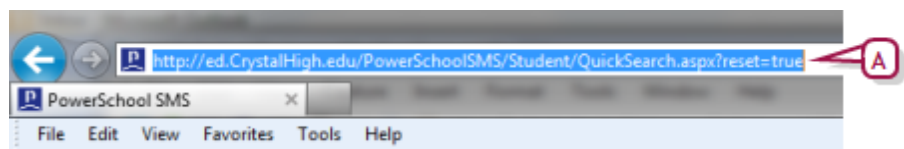
A **Address**: Provided by the system administrator.

Figure 3: Sign In page
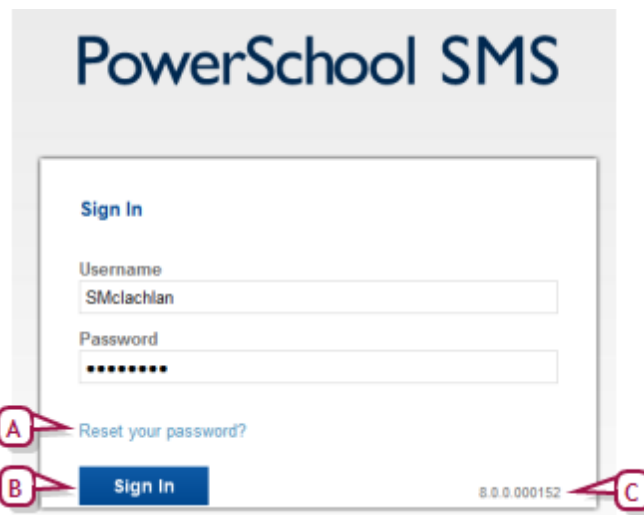
A **Reset your password?**: Click to change the password. If you forget your password, contact a system administrator who can change it for you [p. 239]. The password must contain at least one special character.

B **Sign In**: Click or press **Enter** to sign in.

C Version number

Signing out

When you sign in to a PowerSchool SMS system, you start a work *session*. PowerSchool SMS continues your session until you sign out or until you do not interact with PowerSchool SMS for a certain period of time (typically about

20 minutes), in which case PowerSchool SMS signs you out automatically. This is called a *session timeout*. A system technician can adjust the length of the timeout period for all users of a system. **Note:** If your session times out, any changes that you had not saved may be lost.

To sign out of from PowerSchool SMS:

In the top right corner of the PowerSchool SMS window [*Figure 6*], click **Sign out**. The Sign In page appears.
- Or click the web browser's close button [*Figure 4*].

Figure 4: Web browser: Close

A   Close button

Understanding your role

Your User ID determines the information and tools to which you have access. Each User ID is associated with one user account [p. 236]. A user account is associated with one or more roles [p. 240], such as a Teacher, District Health Professional, or a School Administrator.

Each role has a scope, typically one school or district-wide [p. 240]. Each role also has a standard set of permissions, which control a role's access to specific types of information and to actions, such as changing information or configuring how it is stored [*Role permissions* p.246]. Finally, each role is derived from one of a few base roles [p. 246], which are controlled by a District Administrator.

Switching between roles

Your User ID may give you access to more than one role [p. 240]. Once you have signed in, you may have to switch to another role in order to accomplish a particular task. For example, in a District Administrator-type role, you enroll a new student in the district and then change to a School Administrator-type role to assign that student to classes in a particular school.

Any changes you make to the home page and system, such as reports [p. 19], are stored with the role in which they are created.

Figure 5: Role indicator
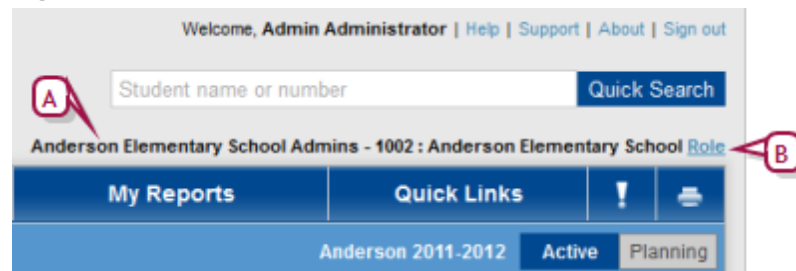
A Role indicator: Specifies the role with which you are signed in.

B <u>Role</u>: Click to choose another role.

To choose another role:

1 On any PowerSchool SMSpage, click <u>Role</u> [*Figure 5*]. A list of roles appears.
   • You can limit the number of roles listed [p. 13].
2 Select a role.
3 Click **OK**.

Your default role

When you sign in with a user account [p. 236] that has more than one role, PowerSchool SMS signs you in with the *default role* [p. 245]. You can change this default role for future sign-ins.

To set your default role:

1 On the Home page's [p. 15]**Actions** menu, click **Change Default Role...**. A list of roles appears. The default role is indicated as "Current".
2 Choose a role.
3 Click **OK**.

Limiting the selection of roles

When your ID has a lot of roles assigned to it, you can limit the selection of roles that PowerSchool SMS presents when you switch between roles [p. 12]. **Note**: PowerSchool SMS can display up to 20 roles in the switch-role list.

To limit the selection of roles for a user ID:

1 From the **Admin** menu, select **User Settings**. The User Settings page appears.
2 Click **Roles**.
3 In the grid of roles, select one or more roles.
4 Click **OK**.

Working with PowerSchool SMS

Since you work with PowerSchool SMS in a web browser, most of the controls you use to move around the system [p. 14] are standard to many web applications and sites. Refer to:

Moving around the system [p.14]

Working on a page [p.19]

Keyboard control [p.30]

Optimizing your web browser [p.31]

Moving around the system

In a PowerSchool SMS system, the general procedure is to click a menu on the *menu bar*, such as **School**, and select from the menu, which opens a *page*. The actions available to you (which are specific to that area) appear on the *task bar*. Above the task bar, the *page path* indicates the page on which you are working and its location in the hierarchy of pages [*Figure 6*].

Figure 6: Page controls
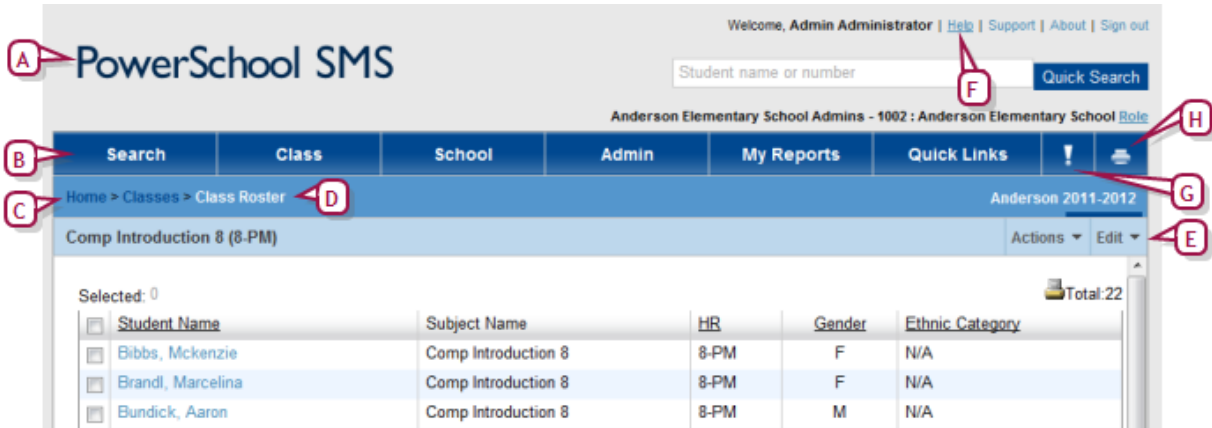
A   "PowerSchool SMS": Click to display the home page [p. 15].

B   *Menu bar*: PowerSchool SMS displays this on every page. The contents varies according to role, such as School Administrator or District Administrator.

C   *Page path*: This path (also know as *bread crumbs*) names the page displayed and indicates its location in the system relative to other pages. It indicates this by means of a path or hierarchical listing. The other pages in the path are displayed as links on which you can click. **Note:** To go back to the previously viewed page, we recommend that you click that page's name in the page path rather than use the browser's **Back** button.

D   Page name

E   *Task bar*: Contains menus specific to the page displayed, such as **Actions**, **Edit**, and **Reports**. The contents of these menus are also specific to the page (in other words, the contents of the Actions menu varies from page to page). The task bar may also display an alert [*Figure 23*].

F   **Help** menu: This menu gives you access to several sources of information on PowerSchool SMS, including information specific to the page currently displayed [p. 1].

G   **Alerts** [p. 32], which monitor the system for specific information and conditions relevant to your role.

H   Print: Click to print the page that is in view.

Moving between pages

Since your system operates across a network and handles large amounts of information, on occasion PowerSchool SMS may take a noticeable amount of time to arrange or process information in preparation for display. In these

circumstances, we recommend that you refrain from clicking buttons or links repeatedly—this does not speed the process.

To help you assess a potential delay, PowerSchool SMS may display an icon or cursor that denotes a delay, such as an hour glass. The web browser's *Status Bar* may also provide useful information. To display the Status Bar, in the web browser's **View** menu click **Status Bar**.

Home page

When the user first signs in to a system [p. 10] when the user switches his role [p. 12], or when he clicks "**PowerSchool SMS**", the system's *home page* appears. The home page differs according to role [p. 240]. For most roles, the home page is the Quick Search page [*Figure 7*]. For a Teacher role, the home page is the My Classes page [p. 16].

Figure 7: Quick Search page example
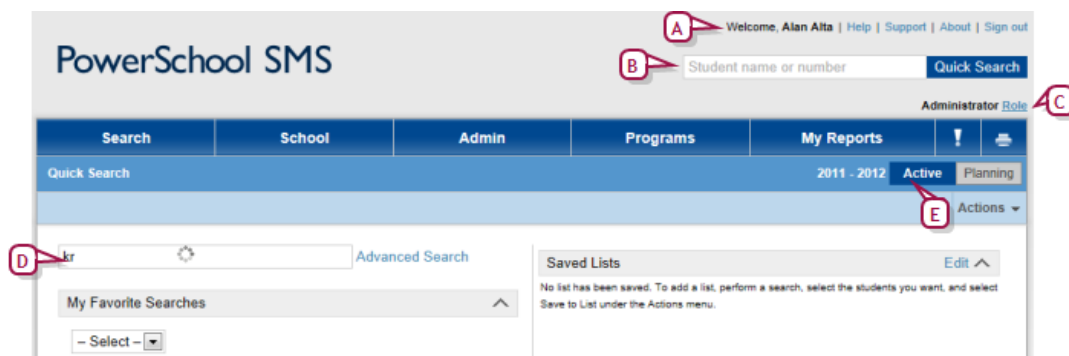
A   User ID: The User ID currently signed in.
B   **Quick Search** [p. 38]
C   **Role**: The role under which this user is signed in. Click the icon to change the role [p. 12].
D   **Student name or ID** [p. 38]: A search of students based on students' last name, first name, or ID number. For the District Administrator, this searches all the schools to which the administrator's role [p. 12] has access.
E   **Active**/**Planning**: Indicates which calendar is in use [p. 169].

A home page may also display some of the following:

- One or more **Predefined Searches** [*Figure 28*], each of which enable you to run a system-defined search on the information currently in the system.
- **Quick Search** [p. 38]: A few predefined searches, typically of all students and students by grade level. **All Students** displays all the students that your role [p. 12] has permission to view. **My Students** displays all the students to which a Counselor is a assigned.
- One or more **Saved Lists** [p. 46], each of which contain the saved results of a previously run search. Any new lists you save automatically appear in this list.
- One or more **Reports**, which assemble certain kinds of information from the system. Of the reports available to you in the system, you can add your choice to the **My Reports** menu [p. 19].

- A **Quick Links** [>>] menu, which provide shortcuts to other pages. You can choose up to ten quick links to display in the menu [>>].
- One or more **Scheduled Events**, including scheduled **Reports** [p. 117] and exports.

My Classes home page

If the user's role [p. 12] is that of a Teacher, when she signs in, the home page [p. 15] that appears is the *My Classes* page [*Figure 8*]. This page gives the user direct access to all classes assigned to her and the students in those classes. The My Classes page for an elementary school Teacher differs slightly from that of a secondary.

Figure 8: My Classes home page

A **Display by**: Enables you to list the classes by period and day [*Figure 10*]. This is particularly useful for attendance taking [p. 76]. A secondary Teacher can also view classes by term and meeting pattern.

B **My Classes**: Appended to the class name is the room number and the homeroom number (in round brackets) or class number [in square brackets].

C **Upcoming Birthdays**: Displays the names of students in the Teacher's homerooms and classes whose birthday is within # days of today's date. Where a name is in italics, that student's birthday has passed.

D **Meeting pattern**: The class's meeting pattern; for example, Monday, Wednesday, Friday at 9 a.m.

E **Roster**: Click the icon to view a roster of students in the class [p. 17].

F **Grading**: Click the icon to enter grades.

G **Attendance**: Click the icon to take attendance [p. 76]. "!" indicates that attendance has not been taken for the current attendance period. If supplementary attendance is set up for this class [p. 182], an attendance icon appears.

Note: On the MyClasses page, PowerSchool SMS displays only the classes for which the user is the active teacher, that is, the teacher who is assigned to the class:

- On today's date if that date is within the class schedule term date range.
- On the class schedule term start date if it is in the future.
- On the class schedule term end date if it is in the past.

Class roster

When the user opens a roster page, PowerSchool SMS displays a list of students scheduled to attend that class or homeroom. What the user can do with this roster depends on her role; for example, a School Administrator can use the roster for scheduling (add a student, transfer a student, drop a student, and so on) a School Secretary can record a behavior incident [p. 93] for one or more students (in the Actions menu, click Add Behavior Incident), a Teacher or School Administrator can save the roster as a list [p. 46] (in the Actions menu, click Save to List...).

Figure 9: Class Roster page

A Columns: The School Administrator can adjust the columns displayed [p. 24].
B **Student Name**: Click a name to view the student's record.
C Student: The School Administrator can filter the list according to a student's status: active, incoming, or withdrawn: from the Edit menu, select Include Incoming Students or Include Withdrawn Students (Current Year).

Class and homeroom lists

For the role [p. 12] of a School Administrator, PowerSchool SMS displays all classes on a Classes page [*Figure 10*], which is similar in function to *My Classes* page [*Figure 8*], and all homerooms on a Homerooms page.

To view the school's classes [SA[1]]:
In the **Class** menu, click **Classes**. The Classes page appears [*Figure 10*].

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[1]You can do this if your role is School Administrator.

A **View Classes**: Filters the list of classes by grade level.
B **Class**: Appended to the class name is the homeroom number (in round brackets) or class number [in square brackets].
C **Room**: The number of the room to which the class is assigned. The building name is appended in brackets.
D **Roster**: Click the icon to view a roster of students in the class [p. 17].
E **Attendance**: Click the icon to take attendance [p. 76]. "!" indicates that attendance has not been taken for the current attendance period. If supplementary attendance is set up for this class [p. 182], an attendance icon appears.

To view the school's homerooms: [SA][1]

In the **Class** menu, click **Homerooms**. The Homerooms page appears [*Figure 11*].

Figure 11: Homerooms page

A **HR**: Click a homeroom name to view a roster of students in the class [p. 17].
B **Room**: The number of the room to which the class is assigned. The building name is appended in brackets.
C **Roster**: Click the icon to view a roster of students in the class [p. 17].

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[1]You can do this if your role is School Administrator.

D **Attendance**: Click the icon to take attendance [p. 76]. "!" indicates that attendance has not been taken for the current attendance period. If supplementary attendance is set up for this class [p. 182], an attendance icon appears.

E **Grading**: Click the icon to enter grades.

Displaying reports in the My Reports menu

The user can control the reports [p. 114] displayed in the My Reports menu [p. 15]. PowerSchool SMS can display up to 20 reports in the menu.

Any customization of this menu is specific to the user account and role [p. 12] in which the user is working when he creates it; in other words, PowerSchool SMS preserves the customized menu and displays it when this user account is signed in and that particular role is chosen.

To select the reports to display in the My Report menu: [SS, T, SA[1]]

1 In the **Admin** menu click **User Settings**. The User Settings page appears.
2 Click **Reports.**
3 In the grid, select one or more reports.
4 Click **OK**.

Working on a page

On a typical PowerSchool SMSpage, you also work with information using web-standard elements such as *fields*, *check boxes*, *lists*, *grids*, *icons*, *buttons*, and *links* [*Figure 12*] [*Figure 13*]. Some pages organize the contents into several collapsible *panels*. On many pages, it is important to save your changes before moving on to another page.

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[1]You can do this if your role is School Secretary, Teacher, or School Administrator.

Figure 12: **Page elements**

A   *Tab*: Organizes information into layers. Click the tab to view its information. Your access to a tab may be restricted by your role. Changes made on a tab are saved only when you save the page [p. 21].

B   *Field*: An area into which you can type information. The type of field (text, numeric, or date) determines the amount or kind of information you can enter. In this manual, a field name is indicated by **bold** text.

C   *List*: Contains several items from which to choose.

D   *System-set field*: An area in which PowerSchool SMS displays information derived from elsewhere.

E   *Panel*: Organizes information on a long page into collapsible sections.

F   Panel arrow: Click to collapse or expand the section.

G   *Context field*: An area you have access to only in specific circumstances, such as a setting in another field on this page.

H   *Button*: Acts on the page, panel, or tab in which it is located. In this manual, a button label is indicated by **bold underlined text**.

Figure 13: **Other page elements**

A *Panel*: Organizes information on a long page into collapsible sections.
B Panel arrow: Click to collapse or expand the panel.
C *List*: Contains several items from which to choose.
D *Grid*: A list of records, the information from which is organized into columns see *Working with a grid of information* [p. 22].
E *Check box*: In this case, a check selects the record.
F *Link*: Clicking this takes you to the relevant information.
G **Total**: The total number of records (on all pages, if the records are displayed on several pages).
H **Top**: On a long page, clicking this scrolls the view to the top of the page.

Saving information on a page

When you make changes to information on a page and you want that information to be saved to the system, you must deliberately save the information before moving on to another page. To save the information on a page, click the page's Save or OK button [*Figure 14*].

When you click the Save or OK button, PowerSchool SMS saves all changes made on that page, including changes made in panels and tabs [*Figure 12*] that may no longer be visible, and closes the page. On a page with an Apply button, when you click the Apply button PowerSchool SMS saves all changes made on that page and keeps the page open.

Some pages contain fields for which you are required to enter information before saving the page. A required field is indicated by an asterisk (*) in its label. If, when you save a page, any required fields are incomplete, PowerSchool SMS displays a message to that effect. If the incomplete field is within a tab, PowerSchool SMS displays that tab, or the first tab of several containing an incomplete field.

Figure 14: Saving information on a page
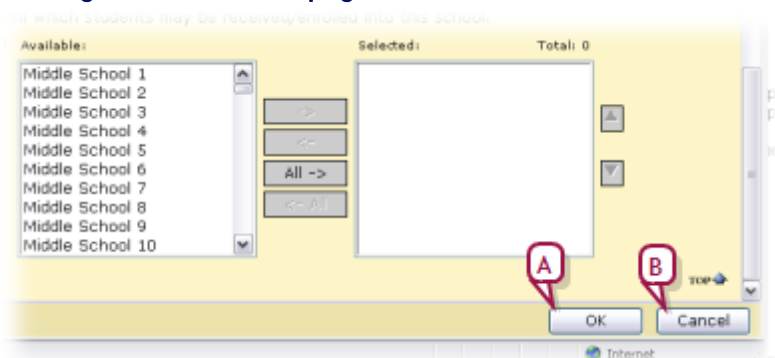
A **OK**: Saves any changes to information made on this page.
Note: This button appears on a page only if it is possible to change information on that page.
B **Cancel**: Discards any changes made on this page.

Working with a grid of information

Some pages display information in the format of a *grid*. Each line of the grid contains a separate *record,* that is, an interrelated set of information. The grid's *columns* display selected types of information common to every record. **Note**: A grid of student search results differs [p. 48].

Figure 15: Grid elements example

A   Number of records currently selected in this grid

B   Select all check box: Enables the user to select or deselect all the records in the grid at once, even if the grid spans more than one page. The user can also select all records by choosing **Select All** from the **Edit** menu.

C   Column label: Displays the type of information displayed in this column for each record. If the label is underlined, the user can use it to sort the records [*Sorting records* p.22].

D   Sort indicator: An ▲ arrow indicates that this row is sorted in ascending order. An ▼ arrow indicates descending order.

E   Record selection check box: Enables the user to select or deselect a record. The user can select one or more records at once.

F   A selected record: Each row consists of one record.

G   Record hyperlink: Enables the user to open the record.

H   **Prev**/**Next**: Where a grid spans more than one page, displays the previous or next set of records from this grid.

I   Records display: Where a grid spans more than one page, this enables the user to see the total number of records in the grid and to choose the set to display.

J   Choose columns: Click to change which columns are displayed and the left-to-right order in which they are presented [p. 24].

K   Sort: Click to change the sorting by one or more columns [p. 22].

L   Print: Print or export the grid [p. 27].

Sorting records

In general, when PowerSchool SMS generates a grid of records, it lists the records in order from top to bottom according to the first column on the left

in ascending order; for example, by Student Name from A to Z. **Note**: For some grid types, such as student search results [p. 48], you have the option of applying a preconfigured *grid view* that sets the column sorting [p. 24].

The user can change the sorting by one or more columns, in ascending or descending order. For example, the user might want to sort a list of staff in ascending order by name, then by gender. This sorting persists only as long as the grid is displayed; that is, when PowerSchool SMS generates a new grid, it uses its default grid view sorting or the grid view you last applied [p. 24]. **Note:** The user can sort on a field that is not displayed as a column.

To sort the columns in a grid of records:

1 With a grid of records displayed (for example, a set of staff search results), click the Sort icon [*Figure 15*]. The Sort page appears [*Figure 16*].
  - Or, from the **Edit** menu, click **Sort Columns...**.
2 Adjust the columns for the purpose of sorting.
  - To remove a field from display, double-click it under **Selected Columns**. PowerSchool SMS moves it to **Available Columns**.
  - To remove a field from display, double-click it under **Selected Columns**. PowerSchool SMS moves it to **Available Columns**.
3 Adjust the order of sorting priority:
  - To move a field up, click it to select it and click the up arrow button.
  - To move a field down, click it to select it and click the down arrow button.
4 Click **OK**.
  - To return to PowerSchool SMS's default column sorting, click **Restore Defaults**.

Figure 16: Staff record default column sorting
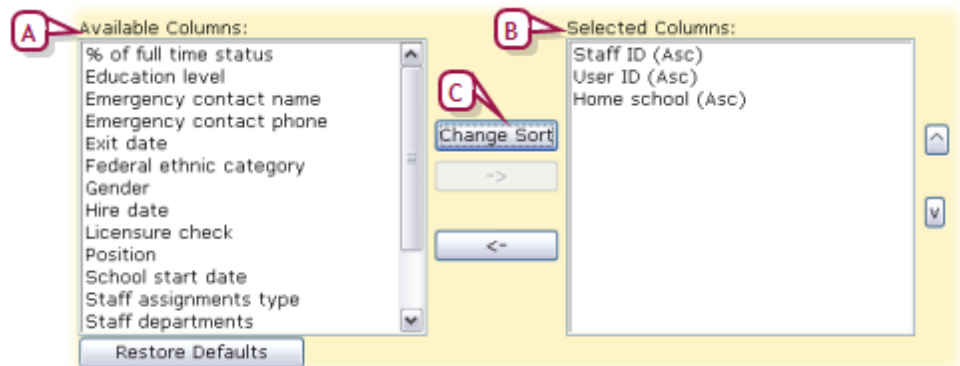
A **Selected Columns** are those on which PowerSchool SMS sorts the grid. The vertical order corresponds to sort order.
B **Available Columns** are the fields from which you can choose to sort.
C **Change Sort**: Toggles the selected column's sorting scheme between ascending ("Asc") to descending ("Desc").

To sort the grid according to a column:

1 On a grid, click a column label [*Figure 15*]. The grid's records are sorted in ascending order and an ▲ (up) arrow appears

beside the label.

- To sort in descending order, click the column label again. An ▼ (down) arrow appears.
- Where the grid spans several pages, clicking a column label on any page has the same effect.

To sort a grid by more than one column:

1 On a page with a grid displayed,click the Sort icon [*Figure 15*]. The Sort page appears [*Figure 16*].

2 For **Sort rows by**, select the first column on which to sort.
- **Note:** You can sort on a field that is not displayed as a column.

3 Set up three more fields on which to sort.
- The vertical order corresponds to the sort order.

4 Set each chosen field to **Ascending** or **Descending**.

5 Click **OK**.

Adjusting the columns displayed

On a grid of records, the columns displayed reflect only some of the fields available for each record. The user can change which columns are displayed and the left-to-right order in which they are presented. Such changes take effect on all grids of records that PowerSchool SMS subsequently generates. For some grid types however, such as student search results [p. 48], the user has the option of applying a preconfigured *grid view* that sets the columns displayed [p. 24].

To adjust the columns displayed in a grid

1 Click the Choose Columns icon [*Figure 15*]. The Choose Columns page appears.
- Or, on the page's **Edit** menu click **Choose Columns...**.

2 Move the field names that you want displayed to the **Available Columns** list.
- To move a field from one list to the other, double-click its name, or click to select it and then click the <- or -> arrow.

3 In the **Available Columns** list, adjust the vertical order of the fields. This is the order in which the columns are displayed left to right.
- To return the columns to PowerSchool SMS's original arrangement, click **Restore Defaults**.

4 Click **OK**. The grid appears with the columns configured accordingly.

Pre-configured views of a grid of information

Rather than adjusting the display of a grid of information each time the user views it, he can apply a pre-configured *grid view*. A grid view defines the columns displayed and the initial sorting of the information that appears in those columns. A grid view applies to a particular type of PowerSchool SMS page, such as student search results [p. 48] Thus, each time the user views that type of page, he can choose the grid view to apply (should more than one be available). Once the user has chosen a grid view for a page type,

PowerSchool SMS applies that same grid view to that page type thereafter until he makes another choice.

The grid view that the user chooses to apply can be a *personal grid view*, which is particular to each user, or a *global grid view*, which is set up by an administrator for the use of others.

To apply a grid view to a grid:

On the page that contains the grid, for **View** [*Figure 35*], select a grid view.
- "(P)" indicates a personal grid view, as in "(P) Students by First Name and Grade".
- "(G)" indicates a global grid view.
- PowerSchool SMSdisplays the **View** field (that is, a list of available grid views) only on pages to which you can apply a grid view.

The user can set up a grid view and save it for later use, or publish it immediately for the benefit of other users. A school-level user can set up a personal grid view for his or her own use. A School Administrator can set up a personal grid view or a global grid view of school-level information for the use of other school users. A District Administrator can set up a global grid view for the use of all district users or a personal grid view of district-level information. Once a user has set up a personal grid view, it is available only to the login ID [p. 10] in which it was created.

To set up a grid view [SA, DA[1]]:

1 From the **Admin** menu, select **User Settings**. The User Settings page appears, which displays a list of grid views available to you [*Figure 17*].
2 Under **Grid Views**, select a **Feature Area** [*Figure 17*].
3 In the **Actions** menu, click **Add Grid View > Personal View**. The Personal Grid View page appears, which displays a list of pages for the selected feature area.
- To set up a global grid view, click **Add Grid View > Global View**.
- To adjust a grid view, select the grid view and in the **Actions** menu, click **Edit Grid View**.
- To delete a grid view, in the **Actions** menu, click **Delete Grid View**.
4 Type a **View name**.
5 Type a **View description**.
6 In the list of pages, select the **Page Name**/**Grid Name** combination to which you want the personal grid view to apply.
- The pages available depend on the logged in user.
7 For a global grid view, set **View options**:
- **Publish**: PowerSchool SMS saves the view and make it available for use.
- **Unpublish**: PowerSchool SMS saves the view but does not make it available for use.
8 Click **Continue**.

---

[1]You can do this if your role is School Administrator or District Administrator.

9   Under **Define Columns**, set the columns to be displayed see
    Adjusting the columns displayed [p. 24].
    • To use the set of columns displayed in an existing grid view, click
      <u>select</u> (located in the sentence "You may select an..."), choose the
      grid view in the Copy Grid View popup page.
10 Under **Define Sorting**, set the sort order of the columns to be
    displayed see *Sorting records* [p. 22].
11 Click **OK**. The new personal grid view appears in the list.

Instead of going to User Settings, the user can adjust a grid view, or save it
as a new view, when working with a grid of search results.

To set up a grid view from a grid:

1   On the page that contains the grid, beside **View**, click <u>Edit</u>
    [*Figure 35*]. The Modify Grid View dialog appears.
2   For **View name**, adjust the name as necessary.
    • PowerSchool SMSenters the name of the current view. If you save this
      grid view without changing the name, PowerSchool SMS asks if you
      would like to overwrite the existing grid view of this name.
3   Under **Define Columns**, set the columns to be displayed see
    Adjusting the columns displayed [p. 24].
    • For **Category**, select a relevant schema. This appears only if more
      than one schema is available. For column categories, PowerSchool SMS
      indicates an extension schema by the prefix <Extension name.field
      name> and a child schema by the prefix (+).
4   Under **Define Sorting**, set the sort order of the columns to be
    displayed see *Sorting records* [p. 22].
5   Click **Save**.

Figure 17: Grid views

A   **Page Name**: Indicates the grid type to which the grid view
    applies. In PowerSchool SMS 8.0, you can set up a grid view
    for the following grid types: Student Search.
B   **Grid Name**: A District Administrator can set up a personal
    view only for District Student Search.
C   **View Name**: Click to adjust the grid view.
D   **Published**: "Yes" indicates that the grid view is "published"
    and thus available to users. "N/A" indicates that it is saved
    but "unpublished" and thus not available.

Table 1: Permissions pertaining to grid views

To	You need this permission	Set to	Details
Create a global grid view	**User Settings > Global Grid View**	Delete	[p. 807]

Printing a grid

You can print any grid in its entirety in a tabular format with a custom title and comments appended. This is particularly useful for grids that span more than one page. To print a grid, PowerSchool SMS first generates a PDF (the Adobe®Acrobat® file format) which you can then send to a printer.

Figure 18: Grid print icon
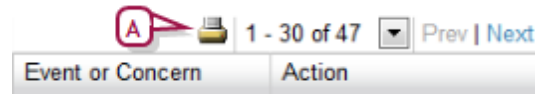
A Grid print: Click to print or export the entire grid.

Figure 19: Sample grid printout in PDF format in a popup page

To print a list of items that spans several pages:

1 On the PowerSchool SMS page, near the top of the grid, click the Print icon [*Figure 18*]. The Grid Print Options page opens.

2 Set report details, which include:
- **Report Name**: This appears as a header at the top of each page of the report [*Figure 19*].
- **Include school/district name**
- **Expand to show all content: The report displays all cell content for cTools fields (such as collection, memo, and child collection).**
- **Comments**: These appear on the last page of the report under the heading "Comments".

3 Set options, which include:
- **Report Format**: For printing, ensure that Report Format is set to **Adobe Acrobat (.pdf)**, which is the default choice.
- **Print format**: Select **Portrait** orientation (tall and narrow) or **Landscape** (short and wide)
- **Page size**: Select **Letter** or **Legal** (taller than letter).

4 Click **Print**. The Grid Print Options page is replaced by a printout in PDF format.

5 On the PDF tool bar, click the Print icon [*Figure 19*].
- To save the print version of the report (that is, the PDF file), click the Save icon [*Figure 19*].

A Print icon: Enables you to print the entire grid or export its information to a specific data format [p. 28].
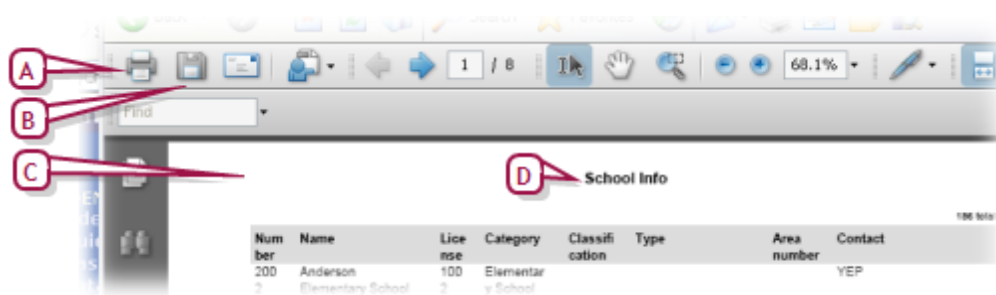
A   Print icon
B   Save icon: Saves a copy of the PDF for future use.
C   Printout
D   Report Name

Exporting information from a grid

As an alternative to generating a printout for a grid, you can export the information from the grid into a format usable in other applications.

To export information from a grid:

1   On the PowerSchool SMS page, near the top of the grid, click the Print icon [*Figure 15*]. The Grid Print Options page opens.
2   In the **Output Options** panel, for **Report Format**, click a suitable data format. Options include:
- **Crystal Reports (*.rpt)**, for which the file extension is ".rpt".
- **Microsoft Excel (*.xls)**
- **Microsoft Word (*.doc)**
- **Rich Text (*.rtf)**
- **Comma-separated values (*.csv)**
- **Tab-separated values (*.tsv)**
- **Plain text (*.txt)**
3   Click **Print**. A File Download dialog appears.
4   Click **Save**. A Save As dialog appears.
5   Set the **File name** and the location to which the file is to be saved.
6   Click **Save**. PowerSchool SMS saves the file to the location specified.

Specialized pages

On occasion, PowerSchool SMS opens a specialized *popup page* in a new browser window [*Figure 20*], which is usually smaller than the main page. When you have finished working with the information on a popup page, use the Save or Close button to close the page and ensure that your work is saved.

Figure 20: Popup page
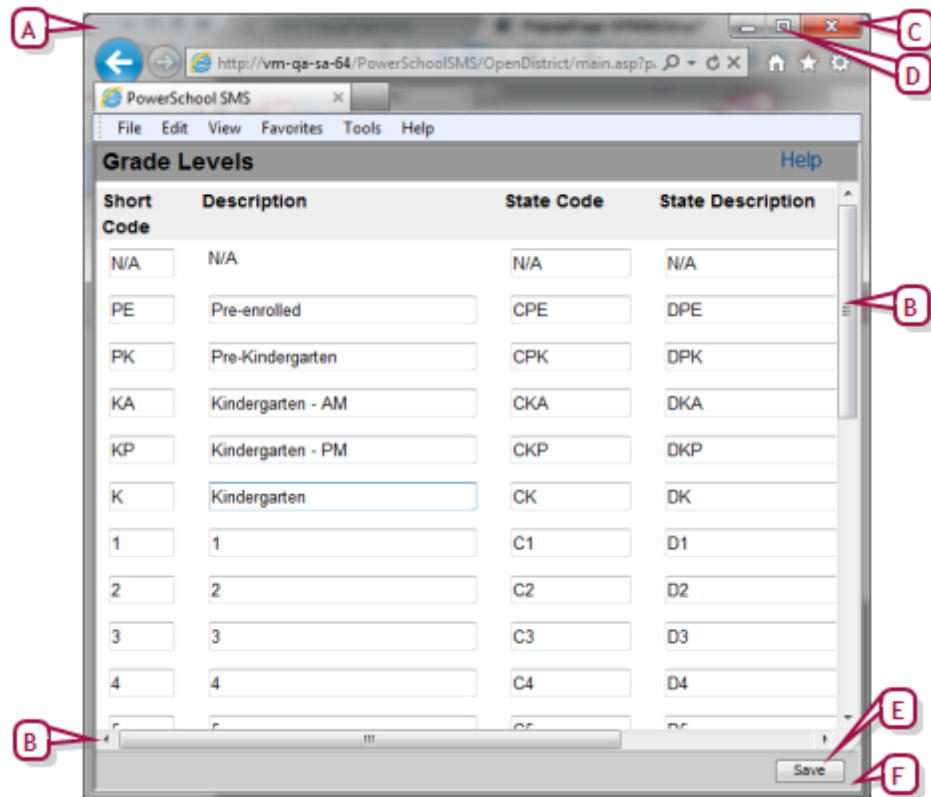
A *Popup page*: This appears as a separate browser window.

B Scroll bars: Vertical or horizontal scroll bars appear where the page extends beyond the size of the browser window. **Note:** When you use the `Tab` key to move the selection [p. 30] the page scrolls automatically.

C Close button: This cancels your changes and closes the popup page.

D Maximize button: This enlarges the page to fit the entire screen. On most screens, this is large enough to ensure that all information on the popup page is visible and to remove the need for scroll bars.

E **Save** button: A typical popup page has a button that saves your changes to the information on this page and closes the page.

F Resize handle: Click, hold and drag this spot (or any of the window's borders) to enlarge or shrink the size of the window.

Note: It is possible to continue working with the main page while a popup page is open. However, if in the course of your work you open the same popup page, a new version of the popup page replaces the old and any unsaved work on the old popup page is lost. Thus, it is prudent to complete work on a popup page and close it before proceeding to other work in a PowerSchool SMS system.

Printing a page

You can print any page. To print the contents of a grid, refer to *Working with a grid of information* [p. 22].

To print an entire page:

- Click the web browser's Print icon [*Figure 21*].
- Or from the web browser's **File** menu click **Print**.

Figure 21: **Sample web browser controls**
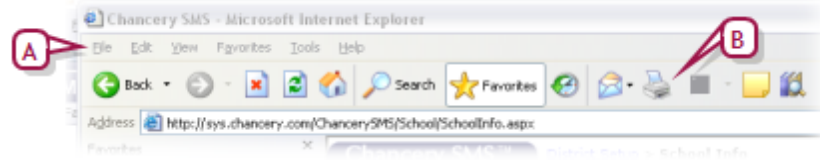
A   **File** menu
B   Print icon

Keyboard control

Typically, you work with PowerSchool SMS using a mouse-driven pointer while using the keyboard to change information in a field. However, some system users, such as those who enter a lot of information or conduct the same task repeatedly, prefer to use the keyboard as much as possible. These users can make use of the keyboard shortcuts built into the web browser [*Table 2*, p.31].

One of the most useful keys is `Tab`, which enables you to shift the selection through a page's elements until the desired element is selected [*Figure 22*].

Figure 22: **Selection examples**
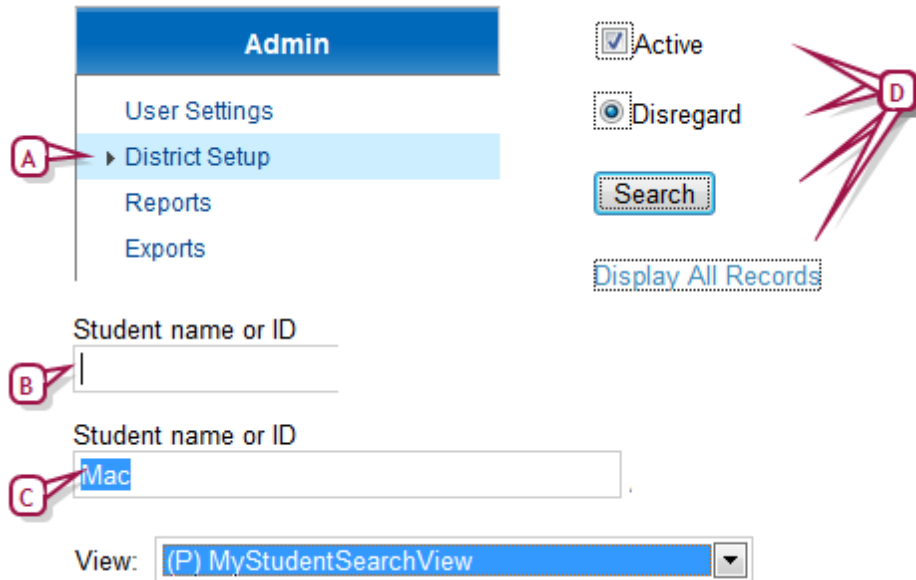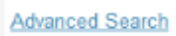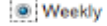
A   Menu highlighting indicates the selection
B   A cursor indicates the selection

C Highlighting indicates the selection.
D A rectangle indicates the selection

On the page, the selection typically appears first in the top left, on the topmost control bar choice, such as **Quick Search** [*Figure 6*] or in the first field [*Figure 22*]. From this position, the selection moves each time you press the `Tab` key, typically down the page and to the right. Press `Shift +` `Tab` to move the selection back. For instructions on how to work with the selected control, refer to [*Table 2*, p.31].

Table 2: **Keyboard shortcuts**

Task with example	Keyboard shortcut
Click a control My Reports	Press `Tab` or `Shift + Tab` to cycle through buttons and fields until the button is selected. Press `Enter`.
Click a link Advanced Search	Press `Tab` or `Shift + Tab` to cycle through buttons and fields until the button is selected. Press `Enter`.
Click a button Add Before Add After	Press `Tab` or `Shift + Tab` to cycle through buttons and fields until the button is selected. Press `Enter`.
Select a check box ☑ Print Gender Summary	Press `Tab` until the check box label is selected. Press the `Space` bar. Press `Tab` to set the choice and move on.
Click an option ◉ Weekly	Press `Tab` until the first option in the set is selected. Press the up or down arrow to select another option. Press `Tab` to set the choice and move on.
Select an item from a list Report Type: By Grade ▼	With the field selected, cycle through the choices by pressing the up or down arrow. - Press `Page Down` to go to the end of the list, `Page Up` to the top. - Press the first letter of a choice to select it. Where more than one choice share the same first letter, press that letter again to cycle through the choices. Press `Tab` to set the choice and move to the next field.
Type in a field ◉ Start:	Cycle through buttons and fields by pressing `Tab` or `Shift + Tab` until the cursor appears in the field. - If the field contains text, all of it is selected. Type. Press `Tab` to set the text and move on.

Optimizing your web browser

You work with PowerSchool SMS using a web browser such as Internet Explorer (on a Microsoft Windows®-based computer) or Safari™(on an Apple® Macintosh® computer). We recommend that you adjust your chosen web browser's settings to optimize PowerSchool SMS operation and to protect the confidentiality of the student information.

To optimize the web browser:

Ensure that the following settings are in effect (to get access to these settings in Internet Explorer, in the **Tools** menu click **Internet Options...**):

- Accept cookies automatically (on by default)
- Enable active scripting (on by default)
- Do not automatically store web pages on your hard drive. A stored web page, which contains confidential information, may be accessible to other users of your computer. (From the Internet Explorer **Tools** menu select **Options**, then under **Browsing History** click **Settings**, and set "Check for Newer Versions of Stored Pages" to **Automatically**.)
- All AutoComplete options are off. If you allow the browser to remember the text you have typed into fields such as Password and Grade, other users of your computer may get access to that information. For this reason, PowerSchool SMS does not support AutoComplete. (From the Internet Explorer **Tools** menu select **Options**, then under **Security** click **Advanced**, and deselect "Use Inline Autocomplete".)
- Restrict the use of web browser tool bar extensions and popup blockers. These interfere with the operation of PowerSchool SMS. The Yahoo tool bar is one of the more problematic. (From the Internet Explorer **Tools** menu select **Options**, then under **Security** click **Trusted Sites**, then click **Sites**, and for "Add this Web site to the zone" enter the PowerSchool SMS system's URL, and click **Add**. Deselect "Require server verification (https:)".)

Alerts

PowerSchool SMS can automatically monitor information and conditions in the system for changes that are relevant to the user's role [p. 12]. When a relevant change occurs, PowerSchool SMS alerts the user to it; for example, when working as a Teacher, you could be notified when another system user records that one of her students will be absent on a future date, or when working as an administrator, you could be notified when a time-consuming report is complete, or when an unusual attendance pattern occurs [p. 195]. PowerSchool SMS alerts you only to those conditions to which you have subscribed [p. 34]. A District Administrator sets up alerting parameters [p. 263].

PowerSchool SMSgenerates an *alert* [*Figure 23*] for the user when information matches criteria defined in an *alert definition*. PowerSchool SMS checks all alert definitions every five minutes. (Alert definitions [p. 35] are assigned to roles by an administrator or technician.)

PowerSchool SMS alerts you by displaying:

- An alert icon on the menu bar [*Figure 23*]
- An alert link on the home page [p. 15] under **Alerts** [*Figure 23*]
- (Optional) An alert message sent to your mobile phone.
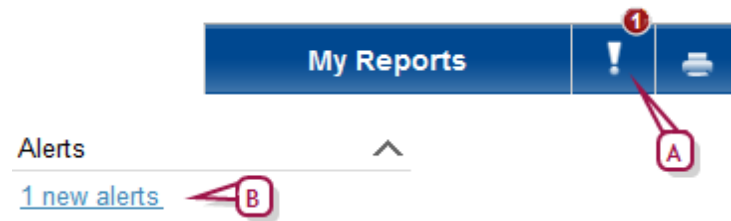
A Alert icon: Click to view a list of all alerts [p. 33].
B Alert link: Click to view a list of all alerts [p. 33].

Viewing an alert

PowerSchool SMS maintains an alert for 30 days or until you delete the alert. PowerSchool SMS displays in bold type alerts you have not viewed. You can view the details of an alert at any time and delete it if necessary.

To view an alert:

1 Click the alert icon [*Figure 23*]. The Alert List page appears .
2 In the **Alert Info** column, click the alert's name. The Open Alert page appears [*Figure 24*].
   - Or select one or more alerts and in the **Actions** menu click **Open Alert**.
   - To delete an alert, select the alert and in the **Actions** menu click **Delete Alert**.
A Alert:
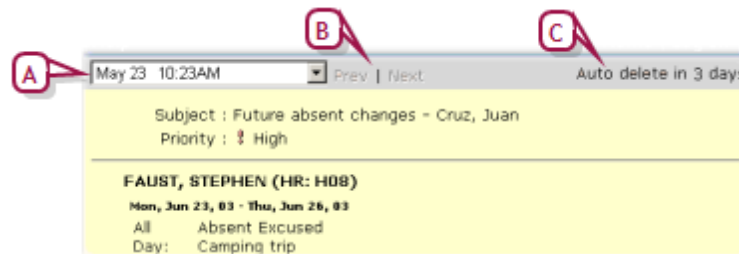
A Date: If you selected more than one alert to view at a time, select the date of an alert to view.
B **Prev|Next**: If you selected more than one alert to view at a time, click these to cycle through the selected alerts.
C **Auto delete**: Indicates how soon PowerSchool SMS will delete the alert. 30 days is the maximum.

When you have investigated an alert, you can remove it from display.

To remove an alert from display:

1 On the Alert List page, select one or more alerts.
2 In the **Actions** menu click **Delete Alert**.

Subscribing to alerts

PowerSchool SMS alerts you only to alert definitions [p. 35] to which you subscribed. When you first start working with a system, you are automatically subscribed to all alert definitions available to your role. Thereafter, you control the definitions to which you subscribe [*Figure 25*].

Some roles [p. 12] are subject to *standard alerts*, that is, alert definitions to which all users with a particular role are automatically subscribed; for example, a homeroom Teacher will receive a Future Absent Attendance Alert when a change is made to the future attendance of a student in his or her homeroom. PowerSchool SMS alerts each user who is assigned to the appropriate role, provided that role is active, the user's account is active, and within the user account that role is also set to active [*Figure 118*] [p. 237]. This includes district-specific standard alerts sent to users with the District Administrator role (but not the District Health Professional).

Figure 25: Sample alert subscriptions

A **Alert Subscription Options**: Alert definitions available to you.

B **Subscribe**: Enables you to subscribe or unsubscribe to an alert definition. Some subscriptions are standard, that is, automatically assigned to your role.

C **Mobile Alert**: Gives you the option of subscribing to an alert on your mobile phone in addition to the alerts received through the regular subscription. This option is available only on some alert definitions. When you receive the text alert, the sender name on your mobile device appears as " [Districtname]@Chancery.SMS.com".

D **!**: Indicates that this alert is high priority.

To subscribe to an alert definition:

1 On the home page's **Action** menu, click **Change Alert Subscription....** The **Change Alert Subscription** page appears and displays a list of available alerts [*Figure 25*].

2 In the **Subscribe** column, select the check box for each alert to which you want to subscribe.
   - If a check box is available in the **Mobile Alert** column, select the check box of each alert for which you want to receive an alert in the form of a text message to your mobile phone.

3 Click **OK**.

Or

On the Alert List page, in the **Actions** menu click **Change Alert Subscription...**.

Table 3: **Permissions pertaining to alerts**

To	You need this permission	Set to	Details
Change an alert	**School Setup > Alert Setup**	Delete	[p. 703]

Alert definitions

An *alert definition* specifies the information and conditions in the system that PowerSchool SMS monitors for changes. When a relevant change occurs, the system sends an *alert* to users who are subscribed to that alert definition.

Several alert definitions are provided with a PowerSchool SMS system. These alert definitions are assigned to user roles [p. 12], such as School Administrator [*Table 4*, p.35] and District Administrator [*Table 5*, p.36]. An administrator can adjust an alert definition, for example to have PowerSchool SMS send it to school staff. Any user associated with the role [p. 12] is automatically subscribed to the alert definition (however, for some alerts, the user has the option of unsubscribing [p. 34]).

Table 4: **School administrator alerts**

Alert	Options	Reference
Batch Address Validation		*Student Demographics: Address/Phone* [p. 62]
Calculate Grades, Credits & GPAs	Mobile	
Calculate Honor Rolls		
Cumulative GPA Calculation		
Daily Attendance Code Calculation Failure		*Calculating daily attendance codes* [p. 159]
Future Attendance Change		
Grade Calculation		
Health Examination Non-Compliance		
Homeroom Change		
Immunization Non-Compliance/Delinquent		
Master Schedule Builder		
Program Eligibility Calculation	Mobile	*Programs* [p. 88]
Student Loader		

Alert	Options	Reference
Test Session Eligibility		
User Account Locked	Mobile, High priority	*User accounts* [p. 236]

Table 5: District administrator alerts

Alert	Options	Reference
Batch Address Validation		*Student Demographics: Address/Phone* [p. 62]
Cumulative GPA and Credit Calculation	Mobile	
Daily Attendance Code Calculation Failure		*Calculating daily attendance codes* [p. 159]
User Account Locked	Mobile, High priority	*User accounts* [p. 236]
Next Year Processing Failure	Mobile	
Report View Generator	Mobile	
Audit Log Task Failure		*Reviewing user activity* [p. 166]

To adjust an alert definition: [SA][1]

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.
2 Under **School**, click **Alerts**. The Alerts page appears
   - The Alerts page displays all alerts, active or not.
3 Click the alert definition. The Edit Alert page appears.
4 Enter or change information, which includes:
   - **This Alert is**: The default is **On**. When set to **Off**, the alert does not generate active alerts [*Figure 23*].
   - **Alert is HIGH Priority**: Check to have PowerSchool SMS display a high priority indicator ("!") wherever this alert appears.
   - **Alert name**: A name that describes the alert.
   - **Description**: An explanation of the alert that PowerSchool SMS displays with its name where space permits.
   - **Alert Message**: PowerSchool SMS appends this message to any alert. This message is included in a mobile alert (a PowerSchool SMStext message).
5 Click **OK**.

---

[1]You can do this if your role is School Administrator.

Student management
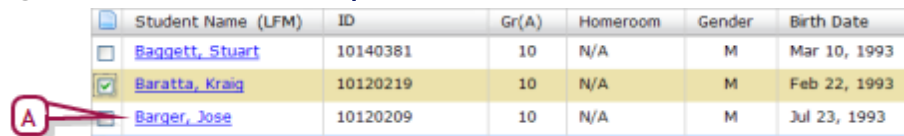
In general, a District or School Administrator sets up student records [>>] in PowerSchool SMS for use by school staff. A School Administrator can view a student record and maintain the information therein. Once a student is enrolled [>>] at a school in PowerSchool SMS, staff at that school (such as School Secretaries, Teachers, School Administrators, and School Health professionals) can view that student's record and add and change some information, such as grades, attendance, and class and homeroom assignments [p. 280]

These capabilities vary, subject to roles [p. 12] and the permissions [p. 246] of individual users; for example, a typical Teacher can view students in his or her classes and homerooms, a School Administrator all students in the school, and a District Administrator all students in the system.

Viewing student information

You can view information on a student through his or her student record [p. 54]. In general, wherever you can see a student's name, you can view that student's record by clicking the name, which is linked to the relevant record.

Figure 26: Student link examples

A   Student name: Click to view a student's record. **Note:** A student name in italics indicates an inactive student [p. 53].

Among the other means through which you can locate a student record are:
- *Searching for students* [p. 37]
- A family [p. 50]
- A class or homeroom roster [p. 16] [p. 17]
- A grading list [p. 16]
- An attendance list [p. 16]
- A list of award recipients
- A list of program participants [p. 88]

Searching for students

In circumstances where you want to view a particular student or a specific subset of all students, PowerSchool SMS offers several types of searches:
- *Quick student search* [p. 38]
- *Advanced student search* [p. 40]
- *Families search* [p. 50]

- *Recent and saved searches* [p. 45]
- *Inactive students* [p. 53]

In general, a search generates a list of students that your role [p. 12] has permission to view. After you conduct a successful search you can save the search criteria for future use [*Recent and saved searches* p.45] or save the results as a list that you can re-use when necessary see *Saved student lists* [p. 46].

Quick student search

The quick student search enables you to quickly search for students by last name, first name, or ID number. You can search for a particular student or a list of students that matches your criteria.

Quick search is available on every page of the system. Also, for all roles except that of Teacher, a dedicated Quick Search page [*Figure 28*] serves as the home page [p. 15].

Figure 27: Quick Search
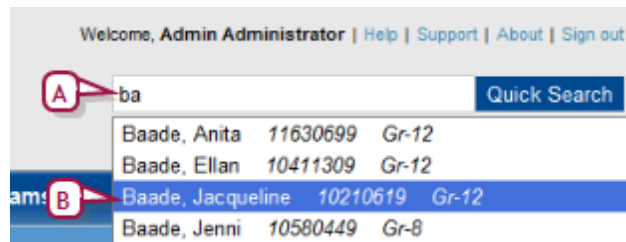
A **Quick Search**: You can search by the first few characters of a student's first name, last name, or ID number.

B Results: Appear as the user enters characters. Select from the list to view a record.

To conduct a quick student search:

1 On any page, for **Quick Search** [*Figure 27*], enter the first few characters of a student's last name, first name, or ID number.
   - Or, on the home page [p. 15], for **Student name or ID**, enter the first few characters of a student's last name, first name, or ID number.
2 PowerSchool SMS displays a list of up to 10 potential matches [*Figure 29*].
   - The potential matches change as you enter more characters.
   - In the list of potential matches, those matching the last name are listed first, followed by those matching the ID number, then those matching the first name.
   - To search specifically for a first and last name combination, enter all or part of the last name followed by a comma and then all or part of the first name. For example, entering "Beni,Ada" would generate a match for "Benito, Adam".
   - **Note**: Quotation marks (") have no effect.
   - If you paste text into the box using the mouse (right-click in the box and choose Paste from the menu), press the `Enter` key to have PowerSchool SMS display the potential matches. If you paste text into

the box using `Ctrl+v`, PowerSchool SMS displays potential matches immediately.

3 Select a potential match using the cursor or the arrow keys and then press `Enter`. That Edit Student Demographics page for the selected student's record appears [p. 54].

  • Or, select **More records, go to search results page...** [*Figure 29*] (or press the `Enter` key) to see a list of students for which the last name or ID number contain the characters typed. In the **Search Results** panel, PowerSchool SMS displays a list of students that match your search criteria.

    • In the **Advanced Student Search** panel, PowerSchool SMS displays relevant detailed search criteria [p. 42].

  • You can changed the sorting of these results or adjust the columns displayed [p. 48].

Figure 28: Quick Search page
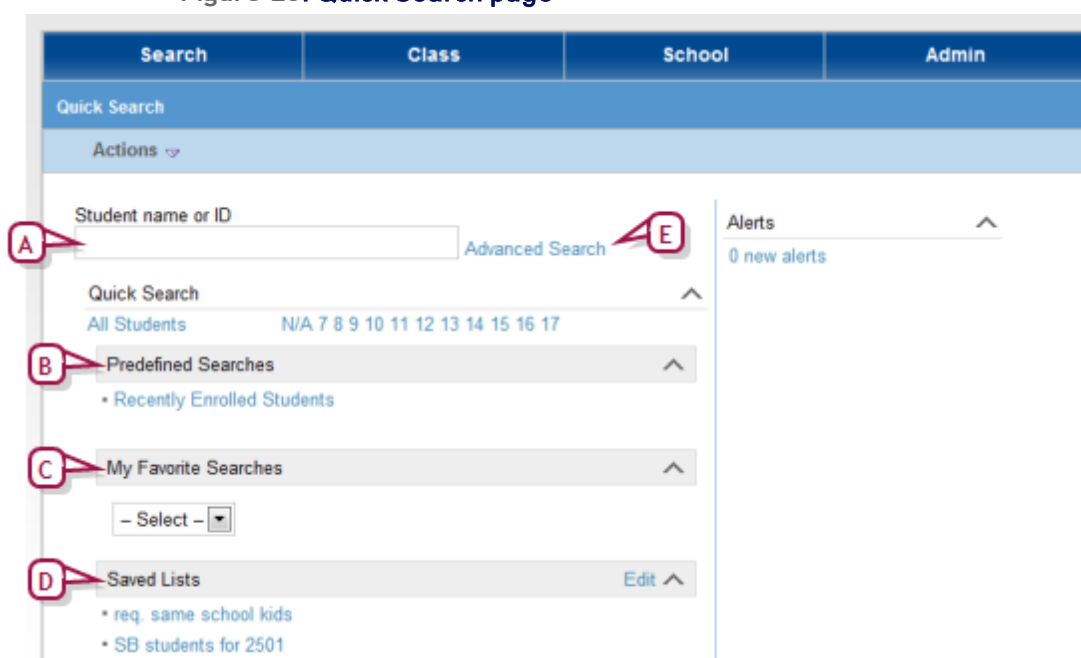
A **Student name or ID**: You can search by the first few characters of a student's first name, last name, or ID number. For example, entering "bry" generates results that includes students with the last name of "Bryson" and the first name "Bryan".

B **Pre-defined Searches**: Searches for which the criteria are fixed. Click a search to generate current results, which PowerSchool SMS displays on the Advanced Search page [p. 40].

C **My Favorite Searches**: Saved favorite searches from the Student Search page [p. 45]. To run a favorite search, select it from the list.

D **Saved Lists**: The results of previously conducted searches. You can change the contents of these lists [p. 46].

E **Advanced Search**: Click to search using other, or more detailed, criteria [p. 40].
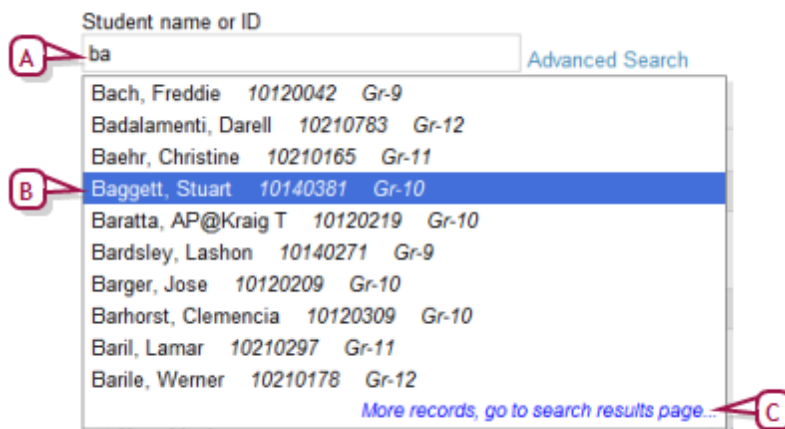
A   Characters for whichPowerSchool SMS is searching.
B   List of up to 10 potential matches
C   **More records, go to search results page...**: Appears
    if PowerSchool SMS finds more than 10 potential matches.
    Clicking this Generates a list of all students for which the
    last name or ID number match the character search string.

Advanced student search

You can search for a specific set of students based on the information stored in many of the fields found in a student record, such as Age, Birth date, Gender, names, telephone numbers, geocodes, Ethnic Category, grade level, Student Number, and SSN/SIN. To perform an advanced student search you configure search criteria and then run the search. You also have the option of viewing all students for which your role [p. 12] has permission.

To set up and run a search for student records using basic criteria:

1   On the home page [p. 15], click <u>**Advanced Search**</u>. The
    Advanced Student Search page appears.
    • The Quick Search page serves as the home page for all roles except
      that of Teacher.
2   Set the **Search in** option to search for students in a specific
    school or across the entire district.
3   Under the **Basic** tab, PowerSchool SMS displays a default search
    setup. This consists of the following three search criteria
    [*Figure 30*]:
    • First criterion:
      "Last name starts with "*Enter a value...*".
    • Second criterion:
      "Student number starts with *Enter a value...*".
    • Third criterion:
      "District or Student saved lists equals *Enter a value...*".
4   Configure each search criterion as follows:

- If you do not enter a value for a criterion, PowerSchool SMS ignores that criterion when you run the search.

  a Enter the value to find: click "*Enter a value...*", type a value, and click **OK**.

- For text fields, the case of the search value does not matter; for example, "lancaster" finds "Lancaster".
- Spaces are relevant; for example, "delos santos" will not find "de los santos".
- You can enter a maximum of 100 characters in a text field, 25 in a numeric, and 10 in a date field.

  b [Optional] Change the operator: click "Operator: starts with" and click an item in the list.

- The field on which you are searching determines which operators are available. Typical operators include: contains, starts with, ends with, equals, does not equal, is empty, is not empty, is in list.
- The operator "is in list" enables you to enter several values at once (separate each with a comma).

  c [Optional] Change the field name: click "Field:..." and click an item in the list.

- Only a limited set of fields are available here. More fields are available in a Detail search [p. 42].

5 [Optional] Add another search criterion:

  a Click **Add**. A new search criterion appears as follows [*Figure 30*]:

"Select a field... Operator... Enter a value...".

  b Click each part of the criterion to configure it.

6 [Optional] Click **OR** to set the search to find records that match *any* of the criteria [*Figure 30*].

- **AND** sets the search to find records that match *all* of the criteria.

7 Click **Search**. PowerSchool SMS runs the search and displays matching student records (if any) under **Search Results**.

- You can changed the sorting of these results or adjust the columns displayed [p. 48].
- PowerSchool SMSsaves the search criteria. Should you want to conduct this same search again, click **Most recent searches** [p. 45].
- When you run a recent or favorite search, PowerSchool SMS displays the criteria under **Basic**.
- To save the search criteria, click **Add to favorites** [p. 45].

Figure 30: Basic student search: default criteria

A **Add**: Adds a new unconfigured search criterion. Use the AND/OR buttons to set the nature of the new criterion.
B **Restart**: Resets the search criteria to one incomplete search criterion as follows: "Select a field... Operator... Enter a value..." [*Figure 31*].
C **Add to favorites**: Saves the search criteria you have configured [p. 45].
D **AND**: Sets the search to find students who match *all* of the criteria in the list. In general, this generates fewer results.
E **OR**: Sets the search to find students who match *any* of the criteria in the list. In general, this generates more results.
F Criterion
G Field: Click it to choose a field.
H Operator: Click it to choose an operator.
I Value: Click it to enter a value.
J **Search**: Runs the search using the criteria as you have configured them.
K **Detail**: Enables you to build a search using a larger range and combination of fields [p. 42], including custom fields.

To display all student records in a district or school:

1 In the **Search** menu, click **Student**. The Quick Search page appears.
2 Click **Advanced Search**. The Advanced Student Search page appears.
3 Set the **Search in** option to search for students in a specific school or across the entire district.
4 Under the **Basic** tab, click **Display All Records**.

Detailed student search

Using a detailed student search, you can search by one or more fields (including custom fields), typically a combination of commonly used information such as Name or Grade and unusual criteria such as Disability or Graduation Date. This search involves building a set of criteria, which can be grouped and organized logically using and/or statements. The tools enable you to build complex queries [*Figure 32*].

PowerSchool SMS remembers your 10 most recent searches so that you can re-run them if you wish [p. 45]. Or, you can save any search for re-use as a *favorite search* under a name of your choice. You also have the option of viewing all students for which your role [p. 12] has permission.

To conduct a search for student records using detailed criteria:

1 On the home page [p. 15], click <u>**Advanced Search**</u>. The Advanced Student Search page appears.
   - The Quick Search page serves as the home page for all roles except that of Teacher.
2 Set the **Search in** option to search for students in a specific school or across the entire district.
3 Click the **Detail** tab. PowerSchool SMS displays a default search setup. This consists of one incomplete search criterion as follows [*Figure 31*]:
   "*Select a field... Operator... Enter a value...*".
4 Under **Detail**, configure the first search criterion [*Figure 31*]:
   a Set the field on which to search: click "*Select a field...*" and click an field name in the list.
      - Since the system contains many fields on which you can search, they are organized into sets. Choose a set from the **Category** list.
   b Set the operator: click "*Operator...*" and click an operator in the list.
      - The field on which you are searching determines which operators are available. Typical operators include: contains, starts with, ends with, equals, does not equal, is empty, is not empty.
      - For the field "Student number" (also known as "Student ID"), the operator "is in the list" enables you to enter as the value a list of one or more student numbers. Separate each number with a comma (that is, comma delimited) and leave out spaces. The list can contain up to 250 characters.
   c Enter the value to find: click "*Enter a value...*" and type a value.
      - For text fields, the case of the search value does not matter; for example, "lancaster" finds "Lancaster".
      - Spaces are relevant; for example, "delos santos" will not find "de los santos".
      - You can enter a maximum of 100 characters in a text field, 25 in a numeric, and 10 in a date field.
      - Use "%" to search for group of unknown characters; for example, "starts with S%h" finds "Smither" and "Soh".
      - Use "_" to search for an unknown character; for example, "starts with S_r" finds "Street" and "Serafin".
      - Use [ ] to search for a character that is normally a "wildcard" character (for example, "%" is a wildcard character that searches for an unknown group of characters); for example, "[_]r" finds "John_Sr.", "[%]" finds "95%".
5 [Optional] Add another criterion: click **Add** and configure the new criterion.

- PowerSchool SMS displays the new criterion as: "*Select a field... Operator... Enter a value*".

6 [Optional] Logically arrange your completed criteria [*Figure 32*]:
- To group two or more criteria, select each criterion and click **Group**.
- To ungroup the criteria in a group, click the group's icon.
- To remove a criterion, click it to select it and click **Delete**.
- To set a criterion or group to be an alternative to the others, click **OR** above the criterion.
- To add a criterion or group to the others, click **AND** above the criterion.

7 Click **Search**. PowerSchool SMS displays matching student records (if any) under **Search Results**.
- You can change the sorting of these results or adjust the columns displayed [p. 48].
- PowerSchool SMS saves the search criteria. Should you want to conduct this same search again, click **Most recent searches** [p. 45].
- When you run a recent or favorite search, PowerSchool SMS displays the criteria under **Detail**.
- PowerSchool SMS may rationalize or re-organize your search criteria slightly (for example, make a group) when you run the search.
- To save the search criteria, click **Add to favorites** [p. 45].

Figure 31: Detail student search: default criteria
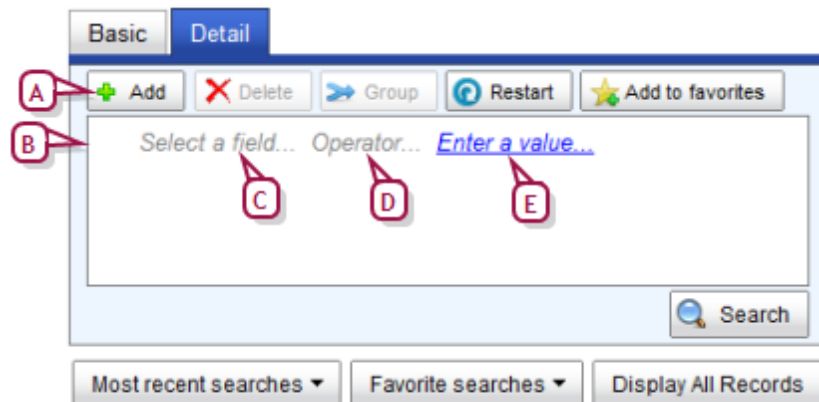
A **Add**: Adds a new unconfigured search criterion. Use the AND/OR buttons to set the nature of the new criterion.
B Criterion: To select the criterion, click to the left of the field name.
C Field: Click it to choose a field.
D Operator: Click it to choose an operator.
E Value: Click it to enter a value.

Figure 32: Detail student search: sample criteria
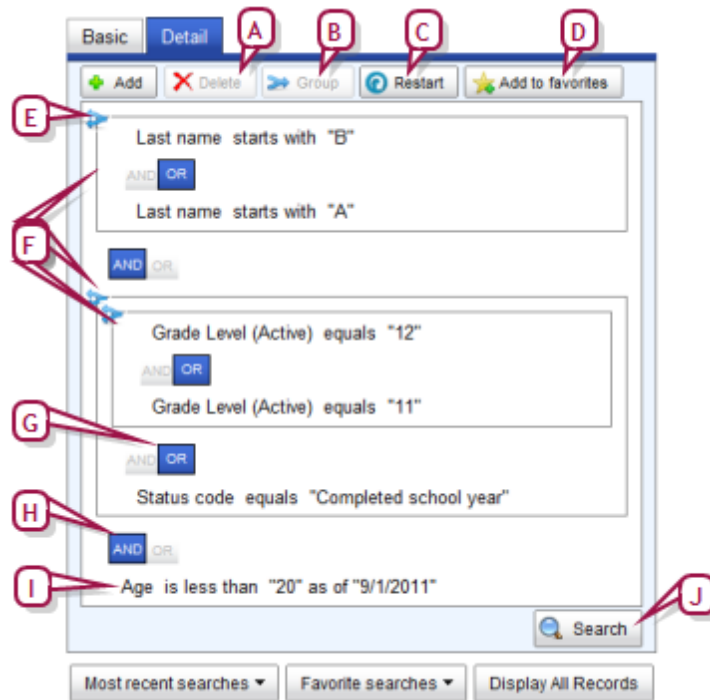
A **Delete**: Deletes the selected criterion.

B **Group**: Groups two or more selected criteria into a separate group.

C **Restart**: Resets the search criteria to the default setup (displayed).

D **Add to favorites**: Saves the search criteria you have configured [p. 45].

E **Group icon**: Click this to ungroup the criteria in the group.

F **Group**: Each group or criteria is separated from others by AND or OR.

G **Criterion (selected)**: To deselect a criterion, click to the left of the field name.

H **AND**: Adds the criteria below it to the other search criteria. In other words, this sets PowerSchool SMS to find records that match *all* the criteria separated by AND. This generates fewer results than selecting OR.

I **OR**: Sets the criteria below it to be an alternative to the other criteria. In other words, this sets PowerSchool SMS to find records that match *any* the criteria separated by OR. This generates more results than selecting AND.

J **Search**: Runs the search using the criteria as you have configured them.

Recent and saved searches

PowerSchool SMS remembers your 10 most recent searches so that you can re-run them if you wish. Or, you can save any search criteria for re-use as a *favorite search* under a name of your choice. This enables you to run the

search again on the information currently in the system to generate fresh results. You can save up to 50 favorites; these are available on the Student Search page only to the User ID in which you saved them.

To re-run a recent search:

1   On the Student Search page [*Figure 30*], click **Most recent searches**. PowerSchool SMS displays a list of the 10 most recent searches.
2   Select a search. PowerSchool SMS conducts the search and displays the results.

To save search criteria for re-use:

1   On the Student Search page, click **Add to favorites**. The Add Favorite Search dialog appears.
2   Type a **Name** and click **OK**. PowerSchool SMS saves the search criteria.
    •   To run the search, click **Favorite searches** and select the name from the list.
    •   To delete a favorite search, click **Favorite searches** and click the delete icon beside its name in the list [p. 46].

Figure 33: Favorite searches
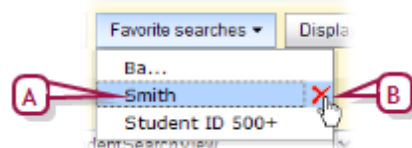
A   Saved search
B   Delete icon: Deletes the saved search.

Saved student lists

Once you have conducted a search and generated a resulting list of students, you can save some or all of these results as a *saved list* (which appears on the Quick Search page [*Figure 28*]) or replace an existing saved list. You can delete a saved list (which has no effect the student records therein).

A saved list is a static list of students. The list only changes if you make changes to it, regardless of your original search criteria or changes to information on students in the list. For example, if you search for Grade 7 students and save the results in a list, the students remain in that list the next year even though they may have moved on to Grade 8.

To create a saved list:

1   Conduct a student search that generates a list of more than one student record [p. 38] .
2   Select one or more students.
3   In the **Actions** menu click **Save to list…**. The Save To List page appears.
4   Click **Create New List** and type a name and description.

- To replace an existing saved list, click **Add to Existing List** and select the list.
- PowerSchool SMS may not display inactive students [p. 53] in the saved list. To view all student types in the list, edit the list and view **List members** [*Figure 34*] or report on the list [p. 50].

5 Click **OK**.

To change the contents of a saved list:

1 On the **Quick Search** page [*Figure 28*], in the **Saved Lists** panel, click <u>Edit</u>. The Saved List page appears.

2 Select a saved list.

3 In the **Actions** menu click **Edit Saved List...**. The Edit Saved List page appears [*Figure 34*].
- Or click the saved list's name.
- To delete a saved list, in the **Actions** menu click **Delete Saved List...**.

4 Adjust options, which include:
- **List name**
- **Description**
- **List members**: The students in the saved list. You can remove students or add students from the Search results list [*Figure 34*]. This list is complete—it shows all students in the list, including withdrawn and graduated.

5 Click **OK**.

Figure 34: Edit Saved List page

A **Search**: Enables you to search for students to add based on Last and/or First name. The results are displayed in Search results.

B **Search results**: Add one or more of these students to the saved list. To add a student, search for the student, select the name from **Search results**, and click **Add**.

C   **List members**: The students in the saved list. To remove a student, select the student and click **Remove**.

Adjusting the student search results display

When a search of student records generates a list of results. PowerSchool SMS displays the results on one or more pages. There is no limit to the number of results PowerSchool SMS can display; however the administrator can only select [*Figure 35*] up to 1000 at a time.

By default, PowerSchool SMS displays several columns of information, starting with Student Name [*Figure 35*]. PowerSchool SMS sorts the list of student records by Student Name, a sorting you can change [p. 50]. The administrator can change the columns displayed and how they are sorted by choosing a pre-configured *grid view* [p. 24].

Figure 35: Student record search results: Default columns and sorting

A   **View**: Enables you to change to a pre configured grid view [p. 24].

B   **Search within results**: Enables you to filter the list of results [p. 49].

C   Select all/Deselect all: Enables you to select all records on the page. You can select up to 1000 at once, across all pages. A District Administrator can adjust this limit [p. 48]. You can filter the results by your selection [p. 49].

D   **Student Name**: PowerSchool SMS sorts the list of student records by the values in this column in ascending order. You can adjust the column sorting [p. 50].

E   Column: Displays information from a student record field, in this case **Student Number**. The default columns are shown. Click a column to sort the list on the contents of that column [p. 50].

F   Select/deselect a record: Enables you to select a record. Press Shift before you click to select several consecutive records. You can make selections on different pages of the search results—PowerSchool SMS retains your selection while paging.

G   <u>Edit</u>: Enables you to configure the grid view [p. 24] and save it.

H   **Rows**: Enables you to change the number of rows that PowerSchool SMS displays on each page of results.

I   **Total**: The total number of records in this search result (on all pages, if displayed on more than one page).

J **Page # of #**: Indicates the number of pages of records (which varies according to the number of Rows). Click the right arrow to display the next page, the left arrow to display the previous. To specify a particular page, click the current page number, type the page number you want, and press `Enter`.

Filtering student search results

You can temporarily shorten the search results list by having PowerSchool SMS display only those records that match certain criteria or by specifically selecting records. Filtering the list in this way is particularly useful for creating a saved list [p. 46].

To filter search results by search criteria:

For **Search within results**, type text and press the Enter key (or wait two seconds) [*Figure 36*]. PowerSchool SMS shortens the list by displaying only those records where the last name or first name starts with the characters typed or the student ID contains them.

- To clear the filter, delete the text from **Search within results**.

Figure 36: Search results filtered by criteria

	Student Name (LFM)	ID	Gr(A)	HR(A)	Gender	Birth Date
☐	Alberson_retained, Golda	10461610	12	N/A	F	Nov 22, 1991
☐	Alder, @David	10460906	12	12C	M	Nov 12, 1991
☑	Alegria, @Ralph	10461227	12	N/A	M	May 29, 1991

Selected: 1   Search within results: al   Rows: 30 ▾   Total:11

A **Search within results**: PowerSchool SMS filters the list according to the text typed.
B **Total**: Indicates the number of records in the filtered list.

To display only selected search results:

1 Select one or more records using the check box.
2 Click on the label **Selected** [*Figure 37*]. PowerSchool SMS shortens the list by displaying only the selected records, and displays **Selected** in green.

- To clear the filter, click **Selected**.

Figure 37: Search results filtered by selection

A → **Selected** 3   Search within results: Rows: 30 ▾   Total:3 ← **B**

	Student Name (LFM)	ID	Gr(A)	HR(A)	Gender	Birth Date
☑	Alegria, @Ralph	10461227	12	N/A	M	May 29, 1991
☑	Kimura, Alene	10461271	12	N/A	F	Oct 16, 1991
☑	Rumfelt, Alfonzo	10460191	12	N/A	M	Mar 20, 1991

A **Selected**: Enables you to display only the selected records, or to clear the filter.

Sorting the student search results display

When a search of student records generates a list of results, by default PowerSchool SMS sorts the list by Student Name [*Figure 35*]. You can sort by the contents of any other column, in ascending or descending order. Sorting by more than one column involves changing the grid view [p. 24].

To sort student search results by one column:

On the Student Search Results page (or on the Student Search page under **Search Results**), click the column name. PowerSchool SMS sorts the list according to the contents of that column, in ascending order.

- An up arrow ▲ indicates the column on which the list is sorted in ascending order [*Figure 35*].
- To sort the column in descending order click its name again. A down arrow ▼ indicates descending order.

Reporting on student search results

When a search of student records generates a list of results, the administrator has the option of running a report on some or all of those students. The reports available depend on the administrator's role.

To report on student search results:

1 On the Student Search page under **Search Results**, select the students on whom you wish to report.
2 In the **Reports** menu, click the desired report. Typical choices include:
   - Report Card [p. 541]
   - Progress Report [p. 541]
   - Student Transcript by Subject Area [p. 548]
   - Student Transcript by Year [p. 549]
   - Student Schedule Matrix [p. 579] [p. 580]
   - Student Schedule [p. 578] [p. 579]
3 The Report Options popup page appears. For information on completing the report, refer to *Running a report* [p. 115].
   - PowerSchool SMS set the report's Filters to report only on the selected students.
   - Where a report has elementary and secondary versions (such as for Student Schedule), PowerSchool SMS automatically uses the report appropriate to your role.

Families search

A search for a *family* [p. 70] generates a list of families and the students within each.

To search for a family:

1 In the **Search** menu, click **Family**. The Family Search page appears.

2 Click the **Basic** tab.
  - Click **Detail** to conduct a detailed family search [p. 52].
3 Under **Search by**, for the first criterion [*Figure 38*]:
  a Select the field on which to search.
    - By default, the criteria are "Last name", "Family name", and "Family number".
  b Select an operator.
  c Type the value to find.
    - Case is not relevant; spaces are.
4 Configure up to two more criteria.
5 Click **Search**. PowerSchool SMS displays matching family records (if any) in the **Search Results** panel.
  - PowerSchool SMS saves the search criteria. Should you want to conduct this same search again, select it in the **List** box.
  - You can changed the sorting of these results or adjust the columns displayed.

Figure 38: Family basic search

A   Criterion
B   Field
C   Operator
D   Value

Figure 39: Family search results

A   **Name:** The family's name. Click to view the students in this family.
B   **Number:** The family's ID number.
C   **Student Members:** The students in this family. These are considered to be *siblings*.
D   **Contacts:** A contact is not necessarily related or living with the student(s) [p. 64]. A subset of a family is a *family unit* which consists of students and their associated contacts who live together [*Student record: Family* p.70].

Detailed family search

Using a detailed search, you can search for a family of students by one or more fields (including custom fields). This search involves building a set of criteria.

To conduct a search for a family using detailed criteria:

1 In the **Search** menu, click **Family**. The Family Search page appears.
2 Click the **Detail** tab.
3 Set the **Search in** option to search for families in a specific school or across the entire district.
4 Add a criterion [*Figure 40*]:
   a For **Category**, choose a set of fields. Your choice determines the fields available to search.
   b Select the field on which to search.
   c Select an operator.
      • The field on which you are searching determines which operators are available.
   d Type the value to find.
      • Spaces matter; case does not.
   e Click **Add Criteria**. The criterion appears under **Search Criteria**.
5 Add more criteria.
   • To remove a criterion, click it to select it and click **Remove** [*Figure 32*].
6 Set **Match**:
   • Select the **Any Criteria** check box to find families that match any one of the criteria in the list. This generates more results.
   • Select the **All Criteria** check box to find families that match all of the criteria in the list. This generates fewer results.
7 Click **Search**. PowerSchool SMS displays student records for all matching families (if any) under **Search Results**.
   • PowerSchool SMS saves the criteria for your most recent 10 searches. Should you want to conduct this same search again, select it from the **List** list.
   • You can change the sorting of these results or adjust the columns displayed [p. 48].

Figure 40: Setting detailed family search criteria

A   Criterion
B   Field
C   Operator
D   Value
E   Search criteria
F   Selected criterion

Inactive students

In general, the students you view in PowerSchool SMS are *active*, that is, a student is who is currently enrolled in the school with which you are working. PowerSchool SMS classifies a student as *inactive* if that student:

- Is *incoming*: This student is coming to the school or scheduled to join a class or homeroom at a future date. The student's enrollment status code is an entry or re-entry type [p. 72].
- Has *withdrawn*: This student has withdrawn from the school in which he or she was enrolled or from a class or homeroom. The student's enrollment status code is a withdrawal-type with no subsequent entry or re-entry type [p. 72].
- Has graduated [p. 53]

PowerSchool SMS displays an inactive student's record name in gray *italics* [*Figure 41*].

Figure 41: Inactive student display

A   Active student
B   Inactive student

Search of inactive students from past years

You can search specifically for inactive students. This search enables a secondary School Administrator at the most recent school in which a student

was enrolled (and not the active enrollment) to view a student who withdrew or graduated from the school in a past year (a District Administrator sets the specific number of years in the past). The School Administrator can also make changes to the inactive student's demographic [p. 55] and historical transcript information [p. 204]. This search is particularly useful to print historical transcripts.

To search for inactive students from past years [SA[1]]:

1   In the **Search** menu, click **Past Years' Students**. The Inactive Student Search (Past Years) page appears.
2   Follow the same procedure as an advanced student search [p. 40].
    *   To print a student's historical transcript [p. 204], in the search results, select the student(s) and in the **Reports** menu click **Student Transcript by Year...** or **Student Transcript by Subject Area....**

Student records

In a PowerSchool SMS system, each student must have a *student record*. A student record holds information such as age, grade level, contacts, medical information, attendance, grades, credits, and so on. Student records are accessible through various types of pages, or the administrator can explicitly seek them out [*Searching for students* p.37].

Given the amount of information stored in a student record, and the purposes for which it is used, PowerSchool SMS provides several different views of a student record [*Figure 42*]:

*   *Student record: Demographics* [p. 55]
*   *Student record: Contacts* [p. 64]
*   *Student record: Family* [p. 70]
*   *Student record: Attendance* [p. 70]
*   *Student record: Grades* [p. 70]
*   *Student record: Credits* [p. 71]
*   *Student record: Schedule* [p. 71]
*   *Student record: Student Behavior* [p. 72]
*   *Student record: Award* [p. 72]
*   *Student record: Tests* [p. 72]
*   *Student record: Registration* [p. 72]
*   *Student record: Enrollments* [p. 72]
*   *Student record: Historical* [p. 74]
*   *Student record: Program Profile* [p. 74]
*   *Student record: Health Tracking* [p. 74]
*   *Student record: Test Results* [p. 74]
*   *Student record: Honor Rolls* [p. 75]

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[1]You can do this if your role is School Administrator.

A Student's name
B Student identifiers: Includes the student's number, current grade, gender, and birthdate.
C Tabs: Organizers for fields on this page. Click a tab to view its contents.
D Menus: Menus specific to the page displayed, such as **Actions**, **Edit**, and **Reports**. The contents of these menus are also specific to the view.
E Current view: The view of the record currently displayed is indicated in the control bar. Click a view to display it.
F *Control bar*: The items in the control Bar vary according to your system and your role [p. 12]. see also *Working on a page* [p. 19]
G Control bar tab: Click to minimize the control bar. Click to open it again.
H Scroll bar: Click to view all links in the control bar.
I Student photo placeholder [p. 57]
J Scroll bar: Click to view all in information on the page.

Student record: Demographics

Your main and initial view of a student record is of its demographic information see *Viewing student information* [p. 37]. PowerSchool SMS displays this information on the Student Demographics page, which includes the following information organized under several tabs:

- *Student Demographics: School-specific student information* [p. 59]
- *Student Demographics: Overview* [p. 56]
- *Student Demographics: Personal Info* [p. 60]
- *Student Demographics: Address/Phone* [p. 62]
- *Student Demographics: Medical Info* [p. 63]
- *Student Demographics: Federal Info* [p. 63]

Some of the same information fields appear in more than one tab. Where you change the information in such a field, that change applies to all instances

of the field. **Note**: When you switch between tabs, any changes you have made to a tab are saved.

Student Demographics: Overview

The information on this Student Demographics page [p. 55] tab contains some information that is also found on the Personal Info [p. 60] tab, as well as the following:

- **Student number**: The student's ID number [p. 257].
- **Social security #**: The student social security number. Access is controlled by the*Access to SSN permission* [p. 765].
- **State number**: The number assigned to this student by the state or province.
- **Last name**: The student's last name as it appears on a birth certificate or legal document presented at time of enrollment.
- **First name**: Displays the student's first name as it appears on a birth certificate or legal document presented at time of enrollment.
- **Middle name**: The student's middle name as it appears on a birth certificate or legal document presented at time of enrollment.
- **Generation**: The student's name suffix, such as "Jr." or "III".
- **Preferred name**: The name the student prefers to be called.
- **Gender**: The student's gender, that is, male or female.
- **Birth date**: The student's date of birth as it appears on a birth certificate or other legal document presented at time of enrollment.
- **Current age**: The student's age in the current year. PowerSchool SMS calculates this based on birth date (if the birth date is changed, PowerSchool SMS recalculates).
- **Home school (Active)**: [>>]
- **Grade level (Active)**: The student's current grade level (also displayed in the header at the top of the Student Demographics page). The grade level is set at the district.
- **Zoned school (Active)**: The default school the student is attending this year, as determined by address validation. PowerSchool SMS displays this field only if this system employs address validation. For detailed information, refer to the 🔴 *Address Validation Guide*.
- **Receives Specialized Services**: Indicates that a student is receiving specialized services. May also contain the date the student began receiving the special services.
- **Section 504 eligible**: Indicates that a student with a disability is eligible for educational services designed to meet his or her special needs.
- **Test accommodation**: Details of accommodations made for the student regarding tests.
- **Lunch status** [>>]
- **Permission to share lunch eligibility** [>>]
- **Contact information**: Lists the student's contact(s) (a person who is responsible for the student, typically one or both parents, or a guardian). Information on a contact includes: Relationship (to the

student), Communication Methods (such as email address or telephone number), and Indicators (or relationship parameters) see *Student record: Contacts* [p. 64].

- **Legal alert**: Any legal alert associated with this student. **Note**: If a legal alert is recorded here, PowerSchool SMS displays a Legal Alert icon at the top of the Student Demographics page.

Table 6: Permissions pertaining to student information

To	You need this permission	Details	Set to
Add and edit student demographic summary information	**Students > Student Overview**	[p. 794]	Edit
Indicate the student receives special services	**Students > Receives Specialized Services**	[p. 783]	Edit

Student photo

You can attach a photograph to a student record. For a photograph to be suitable for storage in a PowerSchool SMS system, the photograph file must:

- Be saved in JPG, JPEG, or GIF format.
- Have a file name that matches the student's district ID number; for example, for a district ID number of 6016012, the file name should be "6016012.jpg" or "6016012.gif".
  - Have dimensions no smaller than 120 x 150 pixels and no larger than 300 x 500 pixels. **Note:** While PowerSchool SMS adjusts any photograph to fit, the compression or stretching involved may distort the photograph.
- For photo clarity, we recommend that the file be at least 25KB in size.

To attach a photograph to a student record: [SA, DA][1]

1 Locate and view the student record [p. 37].
2 Click the **School Specific** (school users only) or **Overview** tab.
3 Click the photo placeholder [*Figure 43*]. The Edit Student Photo popup dialog appears.
  - If a photo is already attached to the record, click **Clear Photo** to remove the file before clicking the placeholder.
4 Click **Browse**. The Choose File dialog appears.
5 Locate and select the JPG or GIF file of the photo you want to import and click **Open**. The photo appears in the dialog.
  - If the photo appears unsuitable, click **Clear Photo**.
6 Click OK. PowerSchool SMS attaches the photo to the student record.
  - If the photo appears unsuitable, click the photo and click **Clear Photo**.

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[1]You can do this if your role is School Administrator or District Administrator.

Figure 43: Student record photo placeholder

Since student photograph files are matched with students by ID number, you can attach photos to up to 200 student records at once.

To attach photographs to several student records at once[SA, DA][1]:

1 Save the photograph files in a single zip.
   - You can save a maximum of 200 photos in each zip file.
   - Ensure that each photo's file name matches the relevant student ID number.
   - When working with a large number of photos, we recommend that your network connection be fast, that is, a LAN or T1.
2 In the **Admin** menu, click **District Setup or School Setup**.
   The District or School Setup page appears.
   - Select **District Setup** to work with student records district-wide.
3 Under **Schools**, click **Import Student Photos**. The Import Student Photos page appears.
4 Under **Step 1**, click **Browse**. The Choose File dialog appears.
5 Locate and select the zip file of the photos you want to import and click **Open**.
6 Under **Step 2**, click **Upload Zip File**. When the file upload is complete, on the page PowerSchool SMS displays a message to that effect.
7 Under **Step 3**, click **Import Photos**. When PowerSchool SMS has finished attaching the photos to the appropriate student records, on the page it displays a message to that effect.

Table 7: Permissions pertaining to student photos

To	You need this permission	Set to	Details
Import student photos	**Students > Photos**	Delete	[p. 783]

[1]You can do this if your role is School Administrator or District Administrator.

Student Demographics: School-specific student information

The information on the Student Demographics page's School Specific tab includes the following:

- **Preferred name**: The name the student prefers to be called.
- **Current age** see *Student Demographics: Overview* [p. 56]
- **Home school (Active)** see *Student record: Enrollments* [p. 72]
- **Current grade level**: The student's current grade level in the district.
- **Current homeroom**: The student's homeroom at the school. A staff member can change it here or in the context of homeroom rosters [p. 18]. **Note**: We recommend that the student be assigned to a homeroom that is compatible with his current grade level.
- **Counselor**: The student's assigned counselor [p. 246], depending on the calendar in use. A School Administrator can assign a School Counselor through the student's academic plan [p. 100]. A School Administrator can assign a School Counselor to several students by selecting a list of students and in the **Actions** menu, clicking **Assign > Values**. In the Assign Values dialog, for **Assign Field**, the administrator can choose a counselor for the Active Calendar ("Counselor (A)") or the Planning Calendar ("Counselor (P)")—provided a Planning Calendar exists. During year-end processing [p. 450], PowerSchool SMS changes the counselor in the Planning Calendar to that of the Active Calendar.
- **Enrollment status** see *Student Demographics: Personal Info* [p. 60]
- **Student promotion status**: Indicates that the student has been promoted to the next grade this year [see p.451].
- **Academic plan** see *Student Demographics: Personal Info* [p. 60]
- **Placement classification**: For an explanation of this field, contact your District Administrator.
- **Distance from school**: Distance in miles from the student's home address to the School of Enrollment's address.
- **Home address is in school's area**: Indicates that the student's home address meets any boundary conditions for the school, such as physical area borders.
- **Upload to parent portal**: Enables an administrator to post information for this student on a *parent portal* [p. 167] for viewing by his or her parents.
- **Lunch status**: The lunch program for which the student is eligible.
- **Permission to share lunch eligibility**: Indicates that the parent/guardian has given permission for their child's school lunch eligibility to be shared with administrators.
- **Contact information** see *Student record: Contacts* [p. 64]
- **Legal alert** [see p.56]

To	You need this permission	Set to	
Add and edit student demographic data	**Students > Demographic Data**	Edit	
Add and edit school-specific student demographic information	**Students > Student School Specific**	Edit	
Add and edit the number of miles a student lives from their school	**Students > Distance from School**	Edit	
Change the student's Home School	**Students > Modify Home School**	Yes	
Add and edit a student's lunch status	**Students > Lunch Status Panel**	Edit	
Enter legal alert information	**Students > Legal Alert**	Edit	
Assign a School Counselor to a student	**Students > Modify Counselor Assignment**	Yes	

Student Demographics: Personal Info

The information on this Student Demographics page [p. 55] tab contains some information that is also found on the School Specific [p. 59] and Overview tab [p. 56], as well as the following:

- **State number** see *Student Demographics: Overview* [p. 56]
- **Alternate number**: The student's number if this system employs an alternate numbering scheme.
- **Full legal name (if different)**: The student's full legal name if different from the Last name, First name, Middle name [p. 56].
- **Registration grade level**: The grade the student was in at the time of registration [p. 138].
- **Registration status**: The status of the student's registration [p. 138].
- **Academic plan**: Requirements the student must meet in order to graduate [p. 100]. This involves the assignment of a Counselor [p. 246].
- **Student type**: Typically Indicates that a student is full time or part time. The purpose of this field may vary according to the district's setup.
- **Year entered 9th grade**: The year or date the student entered 9th grade (if applicable). Depending on your district's setup, this field displays either in year or date format.
- **Zoned school (Active)** see *Student Demographics: Overview* [p. 56]
- **Home school (Active)** see *Student Demographics: Overview* [p. 56]
- **Home school grade level (Active)** see *Student Demographics: Overview* [p. 56]
- **Home school homeroom**: The student's homeroom at the student's home school. PowerSchool SMS displays "N/A" if the student is not enrolled in his or her home school.
- **Birth date** see *Student Demographics: Overview* [p. 56]

- **Birth certificate on file**: Indicates that the student's birth certificate has been verified by staff. To view, import, or replace a scanned birth certificate, click **Edit Birth Certificate**.
- **Birthdate verification**: The type of legal evidence used to verify the student's birthdate.
- **Birthplace**: The city or place of birth as it appears on the student's birth certificate.
- **Birth state**: The state or province in which the student was born, as it appears on the student's birth certificate.
- **Birth country**: The country of birth as it appears on the student's birth certificate.
- **Citizenship status**: Citizenship status in country of residence, such as "Resident", "Dual-national", or "Citizen".
- **Country of citizenship**: The name of the country in which the student is a citizen.
- **Immigrant student**: Indicates if the student is an immigrant.
- **Year entered country**: The date or year (the District Administrator sets which) the student immigrated to the country.
- **Year started school**: The date or year (the District Administrator sets which) after immigration the student started school.
- **First date enrolled US school**: The date the student first enrolled in a school in North America.

PowerSchool SMSdisplays a **Planning District Calendar** panel if a district planning calendar exists [see *District setup* p.251]. This panel hold the following fields:

- **Zoned school (Planning)** see *Student Demographics: Overview* [p. 56]
- **Requested school**: Defaults to the zoned school determined by address validation.
- **Exception reason**: If the Zoned School differs from the Requested School, this describes why the student is requesting an out-of-zone school. PowerSchool SMS displays this field only if this system employs address validation.
- **Next year projected grade**: The grade to which the student is expected to advance in the next year [p. 436].

Table 9: Permissions pertaining to student personal information

To	You need this permission	Set to	Details
Add and edit student personal information	**Students > Student Personal Info**	Edit	[p. 795]
Add and edit a student's state number	**Students > State Student Number**	Edit	[p. 786]
Add and edit the year a student entered 9th grade	**Students > Date/Year Entered 9th Grade**	Edit	[p. 772]
Access other schools from **School** on the Add Status Code page	**Students > Multiple School Status Access**	Yes	[p. 766]

To	You need this permission	Set to	Details
Upload electronic versions of student birth certificates	**Students > Birth Certificate**	Edit or Delete	[p. 770]

Student Demographics: Address/Phone

The information on this Student Demographics page [p. 55] tab includes the following:

- **Phone numbers** panel: The format in which PowerSchool SMS displays phone numbers depends on the administrator's choice: four-field (that is, dialing prefix, area code, number, extension) or one-field. One-field accepts the international phone number format, for example, "011+44+1224+555-4432".

   Note: When you change a student's home phone number, and that phone number is the same as that of other family member(s) [p. 70], PowerSchool SMS gives you the option of copying the new phone number to the other family member(s).

   Place: The location of the phone, such as home or office.

   Pref.: Where several phone numbers are available, the ranking in terms of preference.

   Listing: Indicates if the number is listed or unlisted.

   Type: The type of phone such as cellular, land line, or fax.

   Email address: The student's email address.

   Additional communication numbers: Additional communication numbers for the student.

- **Addresses** panel: PowerSchool SMS displays addresses in five fields, which facilitates address validation.

   Physical address: The street address where the student lives at the time of reporting or the student's last known street address of residence.
   Note: When you change a student's physical address, and that address is the same as that of other family member(s) [p. 70], PowerSchool SMS gives you the option of copying the new address to the other family member(s)'s physical address. **Note**: PowerSchool SMS displays a **Geocode: Coordinates** field and a **Validate** button if the system employs address validation. For detailed information, refer to the *PowerSchool SMS Address Validation Guide*. **Note**: For Geocode, *PowerSchool SMS* displays only the geocode for the student's address.

   Mailing address: The address to which correspondence is sent. This may be the same or different from the Physical address. **Note**: The District Administrator can require that a physical address be provided [p. 267].
   Note: For a student who is part of a family [p. 70], you can copy the Mailing address from a family member—click the **Copy address from...** button.

To	You need this permission	Set to	Details
Add and edit student address and phone information	**Students > Student Address Phone**	Edit	[p. 787]

Student Demographics: Medical Info

The information on this Student Demographics page [p. 55] tab contains some information that is also found on the student's Health Profile page, as well as the following:

- **Medical number**: Depending on district policy, this may be a district-assigned medical number or a parent's medical plan number.
- **Disability**: Indicates that the student has a disability, such as hearing impaired.
- **Critical/chronic health indicator**: Indicates that the student has a chronic or potentially life-threatening condition.
- **Medical alert**: Indicates a significant medical condition, such as food allergy, asthma, or epilepsy. **Note**: If a medical alert is recorded here, PowerSchool SMS displays a Medical Alert icon at the top of the Student Demographics page [p. 55]. The alert does not specify the condition.
- **Medical alert contact**: The name and phone number of the school contact designated to provide health information for students.
- **Permission to**: Indicates permission to call a doctor, call an ambulance, or treat an illness or injury.
- **Doctor's name**: The name of the student's doctor.
- **Doctor's phone**: The doctor's phone number.
- **Doctor's address**: The doctor's business address.

For more information on student health records, please refer to the *PowerSchool SMS Health Tracking Guide*.

Table 11: **Permissions pertaining to student medical information**

To	You need this permission	Set to	Details
Add and edit student medical information	**Students > Student Medical Info**	Edit	[p. 793]
Enter medical alert information	**Students > Medical Alert**	Edit	[p. 780]

Student Demographics: Federal Info

The information on this Student Demographics page [p. 55] tab is required by the federal government. The tab has information that is also found on the Personal Info [p. 60] tab. Information includes the following:

- **Ethnic category**: The student's primary ethnic category.
- **Federal ethnic category**: The student's primary federal ethnic category. This is a category of ethnic identity recognized by the

U.S. federal government for the purposes of census statistics and employment.

- **Federal race categories**: The student's race or races.
- **Lunch status** see *Student Demographics: Overview* [p. 56]
- **Permission to share lunch eligibility** see *Student Demographics: Overview* [p. 56]
- **Immigrant student** see *Student Demographics: Personal Info* [p. 60]
- **Year entered country** see *Student Demographics: Personal Info* [p. 60]
- **Year started school** see *Student Demographics: Personal Info* [p. 60]
- **Emigrated from**: The country from which the student emigrated.
- **Migrant status**: Indicates that the student, or the student's parent/guardian, maintains primary employment in one or more agricultural or fishing activities on a seasonal or temporary basis.
- **First date enrolled US school** see *Student Demographics: Personal Info* [p. 60]
- **Is a language other than English spoken at home?**: Indicates that the student may require an English Language Learners program.
- **Survey date**: The date on which the respondent completed the Home Language Survey.
- **Does the student speak a language other than English?**: Indicates that the student may require an English Language Learners program.
- **Home language**: The language or dialect routinely spoken in the student's home. May differ from the student's native language.
- **Dominant language**: The language or dialect the student best understands and with which they are most comfortable.
- **Native language**: The language or dialect first learned by the student or first used by the parent/guardian with the child. Also referred to as the student's *primary language*.
- **Other language**: Notes another language or dialect, other than the dominant language, in which the student is proficient.

Table 12: Permissions pertaining to student Federal information

To	You need this permission	Details	Set to
Add and edit a student's lunch status	**Students > Lunch Status Panel**	[p. 779]	Edit
Add and edit Home Language Survey information	**Students > Home Language Survey**	[p. 778]	Edit

Student record: Contacts

This view of a student record [p. 54] lists the *contacts* associated with the student. A contact is a person who is responsible for the student, typically one or both parents, or a guardian. A contact is a member of a student's *family* [p. 70].

A student can have many contacts, who need not be related to the student or to each other. A staff member can add as a contact a new person or link an existing contact to the student and thus share that contact between two or more students. The District Administrator can require that a staff member enter at least one contact for each student [p. 267].

This view also lists *siblings* who share this contact. A staff member can link a student to a sibling [p. 68].

To view a contact's information, including his or her relationship with the student, click that contact's name. The information under **Contact Name & Language** includes:

- **Title**: Such as "Mrs.", "Mr.", or "Dr.".
- **Last Name**: The contact's last or surname.
- **First Name**: The contact's first name.
- **Middle Name**: The contact's middle name, if any.
- **Generation**: The contact's name suffix, such as "Jr." or "III".
- **Preferred language**: The language the contact prefers when communicating with the student's teachers or school and district staff.
- Requires translator:

The information under **Communication Methods** describes ways for the administration to contact this person, including:

- **Cellular phone**: Can be up to 15 digits. Possible formats are xxx-xxxx, xxx-xxx-xxxx, x-xxx-xxx-xxxx, and x-xxx-xxxx.
- **Email address**: Must contain the @ symbol and at least one period [.]
- **Facebook**: The full facebook URL, for example http://www.facebook.com/[Facebook account name]
- **Twitter**: @[Twitter account name]
- **Ext**: The contact's phone extension number.
- **Listing**: Indicates that the contact's phone number is listed or unlisted.
- **Auto-Dial**: This information can be used to connect the phone number to the district or school's auto-dial system.

The information under **Address** describes the contact's physical and mailing address. Click **Clear** to clear all address fields so that you can enter new information.

The information under **Relationship** includes:

- **Relationship to student**: Examples include: Guardian, Friend, Foster Parent, Neighbor, Caregiver, Social Work, Stepfather.
- **No contact allowed with student**: This person is not permitted to be in contact with the student.
- **Indicators**: Determines which indicators appear as icons on the Contact List page [*Table 13*, p.67].
- **Permission to pick up phrase**: The phrase the contact must supply to the school to be able to pick up the student. **Note**: Applies only if the Permission to pick up indicator is selected.

- **Comments**: Describes or explains this contact information. Capacity is 32,000 characters.
- **Special Documents**: Identifies documents on file that contain important information about the contact, such as power of attorney or foster parent.

The information under **Employment** includes:

- **Employer Name**: The name of the company where this contact is employed.
- **Job Position**: The position the contact holds at his or her place of employment.
- **Employment Type**: Describes the industry in which this contact works.
- **Federal Employee**: Indicates that the contact works for the federal government.
- **Number**, **Street**, **Type**, and so on: The address of the contact's place of employment.

To add a contact:

1 On a page of the student's record [p. 54], in the control bar click **Contacts**. The Contacts List appears.
2 Beside **Contact Name**, click the add button [*Figure 44*].The Add Contact page appears.
   - A student must have at least one contact and can have a maximum of 20 contacts.
3 Add the contact's information.
   - For **Home Address**, PowerSchool SMS automatically copies the student's address.
   - If PowerSchool SMS detects a possible match between the information entered and one or more contacts, it displays a list of possible matches [*Figure 44*] from which you can select one, if desired. PowerSchool SMS enters the selected contact's information.
   - To remove the contact's entire address, click **Clear**.
   - You can enter a maximum of 20 numbers, email addresses, and web addresses for each contact.
4 Click **OK**.
   - Or, if you are adding multiple contacts, click **Save+Add**. A new blank contact page appears.

To link an existing contact to the student:

1 On a page of the student's record [p. 54], in the control bar click **Contacts**. The Contacts List appears.
2 Click **Link Other Person** [*Figure 44*]. The Link Other Person dialog appears.
3 Enter one or all of the contact's phone number, email address, or name.
4 Click **Search**. PowerSchool SMS displays a list of potential matches.
5 Select a contact from the list.

6 Enter the parameters of the contact's relationship with this student, which include:

- Relationship to student
- No contact allowed with student
- Indicators
- Permission pick up phrase

7 Click **Save & Add**. The linked contact appears in the Contact List on the Contact List page.

To break the link to a contact:

1 On a page of the student's record [p. 54], in the control bar click **Contacts**. The Contacts List appears.

2 Under **Contact List**, in the Indicator's row, click the Remove relationship icon.

- **Note**: If the contact is not linked to any other student in the district, PowerSchool SMS displays a warning message. If you opt to break the link, PowerSchool SMS deletes the contact from the system.

Figure 44: Student record, Student Contacts list
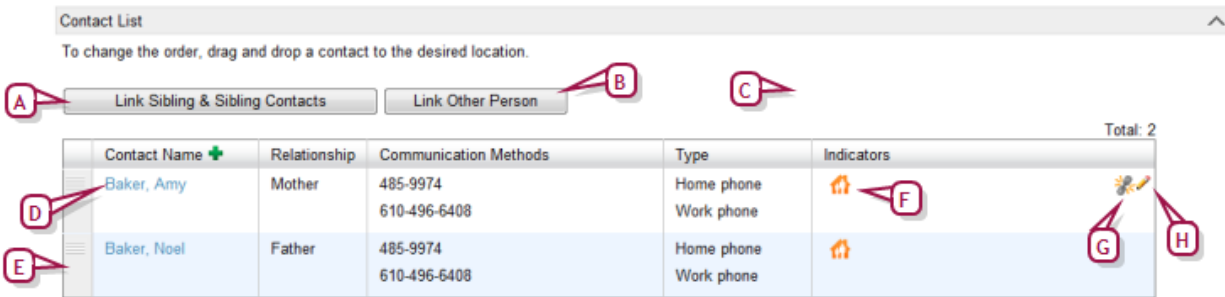
A **Link Sibling & Sibling Contacts** [see p.68]
B **Link Other Person**: Links this student to any other contact. You can search the system for the contact and describe the person's relationship with the student.
C **Possible matches**: Indicates the number of contacts that are possible matches with the contact information entered in the fields Last name, First name, and Communication Method. Click the link to display and select from the list of possible matches.
D Contact: Click to view the details.
E Drag handle: To change the order of the contacts on the Contact List page, drag and drop the contact record to the desired location. By default, PowerSchool SMS lists the contacts in the order in which they were initially recorded, the most recent last.
F Indicator [*Table 13*, p.67]
G Remove relationship: Click to break the link.

Table 13: Contacts indicators

Indicator	Description
☎	**Emergency** Indicates that the contact is to be contacted in case of emergency. Emergency contacts must have a phone number entered under Communication Methods.

Indicator	Description
	Lives with student Indicates that the contact lives with the student.
	Pick up student Indicates that the contact has permission to pick up the student from school. If you want to enter a permission to pick phrase, this option must be selected.
	AM Transportation Indicates that the contact transports the student to or from school in the morning only.
	PM Transportation Indicates that the contact transports the student to or from school in the afternoon only.
	AM/PM Transportation Indicates that the contact transports the student to or from school in the morning and the afternoon.
	Field trip approval Indicates that the contact can approve the student's participation in field trips.
	Requires Translator Indicates that the contact requires a translator when communicating with the student's teachers or school and district staff.
	Gets mailings for student Indicates that the contact is to receive school mail-outs for the student.
	Course request approval Indicates that the contact can approve course requests [p. 108].
	Has custody of student Indicates that the contact has custody of the student.
	No contact allowed This indicates that the contact is not allowed to communicate with the student. Caution: When this option is selected, you cannot add Indicators to the contact record.

Table 14: Permissions pertaining to student contacts

To	You need this permission	Set to	
Add and edit student contacts	**Students > Contact Information**	Edit or Delete	[p. 771]

Linking to siblings

The Contacts view of a student record [p. 54] also lists *siblings*. A staff member can link a student to a sibling and that sibling's contacts, thus sharing that sibling between two or more students.

To link a sibling :

1   On a page of the student's record [p. 54], in the control bar click **Contacts**. The Contacts List appears.

2 Click **Link Sibling & Sibling Contacts** [*Figure 44*]. The Link
Sibling and Sibling Contact dialog appears.
- If the student's physical address is on the student's record,
  PowerSchool SMS enters the address into the search; otherwise, the
  student's last name is entered.
- To refine the search, enter as many search criteria as possible. **Note**:
  This search uses only the AND operator, that is, you can search by one
  criteria *and* another, but not by one criteria *or* another.

3 Click **Search**. PowerSchool SMS displays a list of potential
matches.

4 Select the sibling from the list.

5 Click **OK**. The linked sibling appears in the Sibling List [*Figure 45*].

To break the link to a sibling:

1 On a page of the student's record [p. 54], in the control bar
click **Contacts**. The Contacts List appears.

2 Under **Sibling List**, in the sibling's row, click the Remove
relationship icon [*Figure 45*].

Figure 45: Sibling list

A Sibling's contacts: Highlighted when just added and before
you have saved the Contact Information page. You can
remove all the highlighted contacts at once, or one at a
time.

B Sibling: Highlighted when just added and before you have
saved the Contact Information page. If you remove a
highlighted sibling, PowerSchool SMS also removes its
associated contacts.

C Remove relationship: Click to break the link between this
sibling and this contact.

Student record: Family

This view of a student record [p. 54] displays the student's *family*. In PowerSchool SMS, a family consists of a group of one or more related students (*siblings*).

In a system that employs family management [>>], PowerSchool SMS automatically creates a family for a student when that student registers. The criteria for determining siblings within a family differ from district to district. Typically, brothers and sisters, are considered *siblings*. However, step-brothers or sisters who live in different homes may or may not be considered siblings in the same family.

To add a student to a family [SA, DA[1]]:

1   On a page of the student's record [*Figure 42*], in the control bar click **Family**. The Family Overview page appears.
   - To change the information for a student in the family, click that person's name.
   - Family information includes:
       - **Family number**: The family number, which PowerSchool SMS generates.
       - **Family name**: The family's last or surname.
       - **Student Name**: The name of the student in the family.
       - **Home School**: The name of the home school the student attends [p. 141].
       - **Grade**: The student's current grade level [>>]
2   In the title bar, click **Edit**. The Family Overview popup page appears.
3   Click **Add Existing.** The Add Students to Family popup appears.
4   Enter the information and click **Search Now.** A list of students appears in the Search Results.
5   Select the student.
6   Click **OK**. The Family Overview page appears.
   - To remove a student from the family (where there is more than one student), click **Remove**.
7   Click **Save**.

Student record: Attendance

The Student Attendance view of a student record displays the student's attendance record*Taking attendance* [p. 76]. **Note**: This view is not available to a District Administrator.

Student record: Grades

The Student Grades view of a student record displays the student's grades see *Assigning grades* [p. 84]. **Note**: This view is not available to a District Administrator.

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[1]You can do this if your role is School Administrator or District Administrator.

Student record: Credits

The Student Credits view of a student record displays the credits the student has received, including the associated grade item, grade, potential credits, credits earned, an override indicator, and override reason, if applicable. For detailed information, refer to the 📄*Grading Setup Guide*. **Note**: This view is available only for a secondary school. Also, it is not available to a District Administrator.

Student record: Schedule

The Student Schedule view of a student record displays the classes for which a student is scheduled for a term or the year. The information displayed includes:

- **Term**: The term in which the class occurs, for example, "S1" for semester 1 or "FYT" for Full-Year Term. An asterisk (*) indicates that the student left the class before the end of the term.
- **Meeting Pattern**: The meeting pattern into which the class is scheduled.
- **Class Name**: Click this to view the student roster [p. 17].
- **Teacher** [*School staff* p.215]
- **Room** [*Facility setup* p.200]
- **Details**: Click an icon in this column to view further details about the class.

Note: This view is not available to a District Administrator.

Under **Course Requests** PowerSchool SMS displays the student's requested courses for the next year or term. These requests include required courses and electives. The student can add courses to the list via the Internet using ParentCONNECTxp [see *Online course requests*, p. 108]. The requests are summarized in a list, which the administrator has the option of viewing [*Figure 46*]. Courses recommended by a teacher or counselor [p. 108] are automatically included in the list.

Figure 46: Online course requests

A Course requests

B Online course request icon: Click to view a list (**C**) of course requests and recommendations that originated online [p. 108]. This list identifies the person who recommended each request. **Note**: This list displays course recommendations and course requests for the student's projected school [p. 151] at the time of submission.

A School Administrator or Teacher can enter and adjust course requests on the student's behalf.

To request a course for a student:[SA][1]

1 Search for the student and view the student's record [p. 37].

2 In the control bar, click **Schedule**. The Student Schedule page appears.

3 Under **Course Requests**, use **Course Search** to find the course

4 Under **Course Search Results**, select the course and click Add Request. PowerSchool SMS adds the course to the list of Course Requests.

- Click **Add Alternate** to designate the course as an alternate.

Student record: Student Behavior

This page of a student record displays behavior incidents associated with the student see *About student behavior* [p. 89]. **Note**: This view is not available to a District Administrator.

Student record: Award

This page of a student record lists all the awards the student has received, including the date on which the award was presented see *Awards* [p. 75]. **Note**: This view is not available to a District Administrator.

Student record: Tests

The All Tests for Student view of a student record displays a list of the student's tests. PowerSchool SMS displays this page only if the system employs legacy test functionality.

Student record: Registration

For information on this Register in District view of a student record, refer to *Registering a new student* [p. 138].

Student record: Enrollments

This page of a student record displays the student's enrollment [p. 141] history, that is, each district school in which the student is or was enrolled. A School Administrator records enrollment. Core information includes:

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[1]You can do this if your role is School Administrator.

- **Current home school**: The school the student currently attends for regular classroom instruction.
- **Zoned school (projected)**: The school the student is expected to attend in the following school term, based on the Projected school map or on a system that employs address validation [p. 258], the school in the student's designated zone according to her home address, grade level, and the Geocode map [p. 153]. Displays N/A for those students in grade 12 and where no planning calendar exists.
- **Requested school**: The school requested for the upcoming school year. This may or may not be the zoned school. On a system that employs Program Management, see *Configure student enrollment in a program's sessions* [p. 439]
- **Projected grade level** [see *Projected grade levels* p.436]

For information pertaining to **Enrollment History,** see *Enrolling a student in another school* [p. 146].

Enrollment information pertaining to **Program Management** includes:

- **Program**: Where a school employs one or more programs to control enrollment, this is the controlled enrollment program in which the student has been offered a position [see *Configure student enrollment in a program's sessions*, p. 439]. When initially enrolling a student, the administrator can select one of the programs offered by the school.
- **Session**: Where a school employs one or more programs to control enrollment, this is the controlled enrollment program session in which the student has been offered a position [see *Configure student enrollment in a program's sessions,* p. 439]. When initially enrolling a student, the administrator can select a session appropriate to the selected program based on the school calendar and the Start date.
- **Queue**: Where a district employs one or more programs to control enrollment, this is the controlled enrollment program session queue in which the student is positioned. When initially enrolling a student, the administrator can select a queue that is appropriate to the selected session.
- **Program status**: Where a district employs one or more programs to control enrollment, this is the student's status in the controlled enrollment program [see *Configure student enrollment in a program's sessions*, p. 439].
- **Program override reason**: Where a district employs one or more programs to control enrollment, this indicates the reason an ineligible student is enrolled in a program [see *Configure student enrollment in a program's sessions*, p. 439].

Student record: Historical

For information on this view of a student record, refer to the 📄 *Grading Setup Guide*.

Student record: Program Profile

This view of a student record [p. 54] displays the programs in which the student is enrolled as well as the state of any applications the student has made to a program to which she has applied see *Programs* [p. 88]. For detailed information, refer to the 📄 *Program Management Guide*.

Student record: Health Tracking

For information, refer to the 📄 *Health Tracking Guide*.

Student record: Test Results

The Student Test Results view of a student record [p. 54] displays a list of all the student's test results, including the test date, the school at which the test was taken, the student's grade level, if the test was waived, and any comments. Information includes:

- **Test date**: The date on which the test was taken.
- **School name**: The location of the test session. Choices include "Home School", "In district school", "Out of district school". If you select the "Out of district school", type the school's name in the box below the selection.
- **Grade level**: The grade level of the student on the date of the test.
- **Waived**: Indicates that the student has a waiver for the test
- **Comment**: Comments on the student's overall test results.

Note: Before you can add, edit, or view test results for students, a District Administrator must first set up the tests used in the district and add test session information.

Note: Typically a teacher does not have permission to enter test results.

To add test results for a student:[SA, DA][1]

1 Locate and view the student's record [p. 37].
   - Or, if you are a teacher and have permission to enter test results, on the My Classes home page [p. 16], in the **Roster** column, click a roster. The Roster page appears [*Figure 9*]. In the **Student Name** column, click the student's name. The Edit Student Demographics page appears.
   - see also *Student records* [p. 54]
2 In the control bar, click **Test Results**. The Add/Edit Student Test Results page appears.

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[1]You can do this if your role is School Administrator or District Administrator.

- The test scores grid displays the appropriate score in the cell where each component (test, sub test, and skill) and score type (raw score, percentile, mastery score, etc.) intersect.

3 In the **Actions** menu, click **Add Test Results**.
- Or click a test result to change it.
- To delete a test result, select it and in the **Actions** menu click **Delete Test Results**.

4 Enter or change information, which includes:
- **Date**: The date on which the test was taken. The date defaults to today's date. If the test date is not today's date, click <u>Recalculate</u> to refresh the list of valid test sessions.
- **Test session**: The session in which the student took the test. The test session selected determines the test, sub tests, and skills, with the associated score types, that are captured in the Test Scores panel.
- **School**: The default setting is the home school. To change this, select **In district school** and select a school from the list or select **Out of district school** and type the school's name.
- **Exemption**: Indicates that the student has a waiver for the test.
- **Exemption reason**: Indicates the reason the student's test was waived.

5 On the test scores grid, enter the appropriate scores and comments by clicking in the cells.

6 Click **OK**.

Student record: Honor Rolls

For information on this view of a student record, refer to the 📄 *Grading Setup Guide*.

Student record: Background Data

This view of a student record holds miscellaneous demographic and social service information.

Awards

A School Administrator can track *awards* the school grants to students. Examples of award types include Honor Roll, Principal's List, department award, Perfect Attendance, and Community Service. Where a school gives a standard award to students, a School Administrator can use PowerSchool SMS to set up the type of award [p. 214] and to record its granting [p. 75].

Granting awards

Granting an award involves adding students to a list of recipients and printing an *award certificate* for each recipient [*Figure 47*]. A School Administrator can complete these tasks at different times. Typically, the administrator would decide on the *award date* at the time of printing. The administrator can create more than one list of recipients for a particular

type of award (that is, more than one instance of any type of award)—each list receives an award dated according to that list's Award Date.

Figure 47: **Award certificate standard layout example**

A Border
B **Award Name**: This text is set up for the particular award type [*Awards setup* p.214].
C **Award Recipient**: PowerSchool SMS sets this name for each award recipient to whom the award is granted.
D **Certificate description**: This text is set up for the particular award type [*Awards setup* p.214].
E **Award Date**: PowerSchool SMS sets this text according to the date you specify for each list of recipients.

Table 15: **Permissions pertaining to student awards**

To	You need this permission	Details	Set to
Assign awards to students	**Students > Award s**	[p. 769]	Delete

Taking attendance

You record attendance in the system by choosing an *attendance code* that indicates the student's status; for example, Present, Absent Unexcused, or Tardy Unexcused. To save time, each class has a default attendance code which the staff member changes only if necessary. Typically, the default code is "Present" [*Figure 48*].

When the staff member needs to choose a code other than the default, he or she can select from a preset list of *school attendance codes*. A School Administrator sets up the attendance codes [p. 185]. PowerSchool SMS tallies attendance according to methods and schedules set up by a School Administrator [p. 189].

As a Teacher or School Administrator, you take attendance for a class or homeroom; you can also view past attendance. A School Administrator can assign attendance for a future date and change past attendance, including clearing attendance records [p. 161]. The frequency at which you take attendance depends on the attendance-taking method in use at the school: one-daily, twice-daily, or by-class see *Setting an attendance method* [p. 181].

A class or homeroom may have a time which attendance is due to be submitted. If you are the staff member responsible and attendance is not submitted, you may receive an alert to that effect [p. 32]. **Note**: In some circumstances, system processes result in automatic attendance being assigned, such as absences for a suspended student.

You can take attendance by:

- *Assigning attendance on a student roster* [p. 77]
- *Assigning attendance to one student* [p. 79]
- *Assigning attendance to various students at once* [p. 81]

Table 16: **Permissions pertaining to attendance**

To	You need this permission	Details	Set to
View class attendance information	**School Setup > Classes**	[p. 711]	View
Edit class attendance information	**School Setup > Classes**	[p. 711]	Edit
View homeroom information	**School Setup > Homerooms**	[p. 722]	View
Edit homeroom information	**School Setup > Homerooms**	[p. 722]	Edit
To change an attendance code set by student behavior action steps	**Attendance > Override Student Behavior Attendance**	[p. 632]	Yes

Assigning attendance on a student roster

You can take attendance for a roster of students on the current date by assigning an attendance code to each student. When your attendance taking is complete you submit the record for storage in the system. You can save your record for later submission should you need to update attendance, such as for a student who is late rather than absent. Where PowerSchool SMS indicates to the user that attendance needs to be taken depends on that users role:

- On a Teacher's My Classes home page [p. 16]
- On a secondary school School Administrators Classes page [p. 17]
- On an elementary school School Administrator's Homerooms page [p. 15]

To take attendance:[T, SS, SA][1]

1 Open an Attendance page.
   - For example, by clicking the attendance icon on the My Classes home page [p. 16].
   - For example, by clicking **Classes** in the **Class** menu.
   - For example, by clicking **Homerooms** in the **Class** menu.
   - If the school attendance method is by class, ensure that the appropriate period is displayed [*Figure 48*] [*Figure 48*].
2 Assign an attendance code to each student whose attendance status differs from the default.
   - If necessary, select a school attendance code [p. 185] in the **Code** column.
   - If the school attendance method is twice-daily, select AM or PM [*Figure 50*].
3 Click **Submit**.
   - To save your work without submitting, in the **Actions** menu click **Save**.

Figure 48: Attendance taking for a roster

A Date and time of class or homeroom: Displays a choice of AM or PM if the school attendance method is twice-daily [*Figure 50*]. Displays the period time, if the school attendance method is by class [*Figure 51*].

B Quick entry buttons: These buttons enable you to enter one of the three standard attendance types: Absent (A), Tardy (T), and Present (P). Click a code to assign it. You can change the code that is assigned to these buttons [p. 187].

C Default attendance code: In this case, all students in this class/homeroom are considered Present until you assign them another code [see also *Setting a default attendance code for a class or homeroom* p.188].

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[1]You can do this if your role is Teacher, School Secretary, or School Administrator.

D **Code**: Enables you to assign one of the school's attendance codes [p. 185] or one of the standard attendance codes.

E **Min. Abs.**: The number of minutes late or absent (if the school records this).

F **Comment**: Click in the column to enter a comment, or select the student.

G Comment: To view a comment, move the cursor over the note icon.

H **Submit**: Records this attendance record in the system.

I **Submit & Logoff**: Records this attendance record in the system and logs you off the system [p. 11].

Figure 49: Once-daily attendance taking

Figure 50: Twice-daily attendance taking

A Attendance period: Select "AM" or "PM".

Figure 51: Class attendance taking

A Class: Enables you to select a class for which to take attendance.

B **Prev|Next**: Cycles through the classes.

Assigning attendance to one student

You can assign attendance to an individual student for various days and attendance periods. This method also enables you to review the student's attendance record and observe patterns.

To assign attendance to a student: [T, SS, SA][1]

1 Locate and view the student's record [p. 37].

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[1]You can do this if your role is Teacher, School Secretary, or School Administrator.

- Or, on the My Classes home page (Teachers) [p. 16] or on the Classes [*Figure 10*] or Homerooms page [*Figure 11*], in the **Roster** column, click a roster. The Roster page appears [*Figure 9*]. In the **Student Name** column, click the student's name. The Edit Student Demographics page appears.
- Or, at an elementary school, in the **School** menu click **Attendance**. The Attendance page appears [*Figure 54*]. Search for the student and select her record.
- see also *Student records* [p. 54]

2 In the control bar, click **Attendance**. The Student Attendance page appears [*Figure 52*].

3 Assign attendance for each attendance period for each day, as necessary: click on the table to choose a code.
- The number of attendance periods each day depends on the school's attendance method [p. 181].
- To print the student's attendance for a day, in the **Actions** menu click **Print Daily Summary**.
- To print the student's attendance record, in the **Actions** menu click **Print Details**.

4 Click **Save**.

Figure 52: Student Attendance page

A **Date range**: Select the range of attendance records to be displayed.
B **Calendar**: Displays the months in the specified date range. Click **Prev** or **Next** to adjust the range by a month.
C **Daily attendance grid**: Displays one row for each day, one column for attendance period. For example, once-daily shows one column, by-class shows one column per period in the day ("P1", "P2", etc.). PowerSchool SMS displays today's date in bold type and marks with an exclamation mark (!).

D Day type: Enables you to restrict the view to Exception days only [p. 178].

E Schedule: To view the student's schedule for the day, move the cursor over the icon—a day schedule appears [*Figure 53*]. Available only at a school using the by-class attendance method [p. 181].

F Comment: To view a comment, move the cursor over the icon. To add a comment, click in the column.

Figure 53: A student's schedule for the day
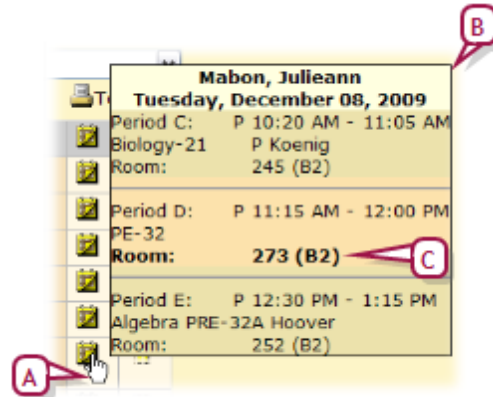
A Cursor and schedule icon: The schedule remains in view as long as the cursor is over the schedule icon.

B Day schedule: Information includes periods, times, course names, and room numbers.

C Current room number: PowerSchool SMS displays the room number in **bold** type when it is the appropriate room for the current time on the current day.

Figure 54: Elementary school Attendance page example

Assigning attendance to various students at once

You can assign the same attendance code for a day to a selection of students, even students from different rosters. How you do so depends on the attendance method method [p. 181] employed by the school.

In a school that employs the By-class method, to assign

1 Generate a list of students [p. 37]. Select the students. In the **Actions** menu click **Mass Attendance**. The Mass Attendance page appears.
   - Or, on a class roster [p. 17], select students and in the **Actions** menu click **Assign Attendance**.
2 Use **Start** and **End** to set the date range.
   - **Note**: A Teacher can only set this date range to the current date.
3 For **Assign to**, select one of the following:
   - "Daily Attendance"
   - "All Periods"
   - "Selected Periods": PowerSchool SMS displays the possible periods in the **Available** column. Select one or more periods by moving them from the **Available** column to the **Selected** column.
4 Select an **Attendance code**, which will apply to all of the selected students.
5 Click **OK**.

In a school that employs the once-daily method, to assign attendance to several students at once:[T, SS, SA][1]

1 Generate a list of students [p. 37]. Select the students. In the **Actions** menu click **Mass Attendance**. The Mass Attendance page appears.
   - Or, on a class roster [p. 17], select students and in the **Actions** menu click **Assign Attendance**.
2 Use **Start** and **End** to set the date range.
   - **Note**: A Teacher can only set this date range to the current date.
3 For **Assign to**, select one of the following:
   - "Class Attendance": If you make this choice, for **To** select "All Periods" or "Selected Periods." If the latter, then PowerSchool SMS displays the possible periods in the **Available** column. Select one or more periods by moving them from the **Available** column to the **Selected** column.
   - "Homeroom Attendance": If you make this choice, for **To** select "Full Day", "AM Only", or "PM Only".
4 Select an **Attendance code**, which will apply to all of the selected students.
5 Click **OK**.

In a school that employs the twice-daily method, to assign attendance to several students at once:[T, SS, SA][2]

1 Generate a list of students [p. 37]. Select the students. In the **Actions** menu click **Mass Attendance**. The Mass Attendance page appears.
   - Or, on a class roster [p. 17], select students and in the **Actions** menu click **Assign Attendance**.
2 Use **Start** and **End** to set the date range.
   - **Note**: A Teacher can only set this date range to the current date.
3 For **Assign to**, select one of the following:

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[1]You can do this if your role is Teacher, School Secretary, or School Administrator.
[2]You can do this if your role is Teacher, School Secretary, or School Administrator.

- "Class Attendance": If you make this choice, for **To** select "All Periods" or "Selected Periods." If the latter, then SMS displays the possible periods in the **Available** column. Select one or more periods by moving them from the **Available** column to the **Selected** column.
- "Homeroom Attendance": If you make this choice, for **To** select "Full Day", "AM Only", or "PM Only".
- "Daily Attendance"

4 Select an **Attendance code**, which will apply to all of the selected students.

5 Click **OK**.

Assigning grades

Staff members, such as teachers, school secretary, and the School Administrator, can assign grades to students by:

- *Assigning grades on a student roster* [p. 84]
- *Assigning grades to one student* [p. 86]

Note: The staff member can assign grades after the grading report period has passed only if the school has set up a grace period for assigning grades [*Grading setup* p.204].

Assigning grades on a student roster

A staff member can assign grades for the current grading report period to students on a roster by assigning a grade code to one student per subject at a time, or to several students per subject. The subjects for which staff can assign grades depends on the type of student list; for example, on a homeroom list [p. 17], you can assign grades for all subjects.

To assign grades: [T, SS, SA][1]

1 On the Classes page (secondary school setup) [p. 16] or Homerooms page (elementary school setup) [p. 202], click the grading icon in the **Grading** column. The Grades page appears [*Figure 55*].
- The Grades page initially displays the current grading period.
- The **Legend** [*Figure 56*] displays the grade codes available for use on this particular Grades page.
- You can adjust the columns displayed: in the **Edit** menu click **Choose Columns...**.

2 Assign a grade to each student for each grade item. Or assign a grade to several students at once for each grade item:

a Select the students.

b In the **Edit** menu click **Fill Columns...**. The Fill Columns page appears.

c Enter or change Information, which includes:

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[1]You can do this if your role is Teacher, School Secretary, or School Administrator.

- Assigning the same grade to all students on the Grades page or only those selected
- Overwriting existing grades, where these are recorded, or only assigning a grade where no grade is recorded.
  d Assign the grade.
  e Click **OK**.
3 Click **Save**.

Figure 55: Grades page
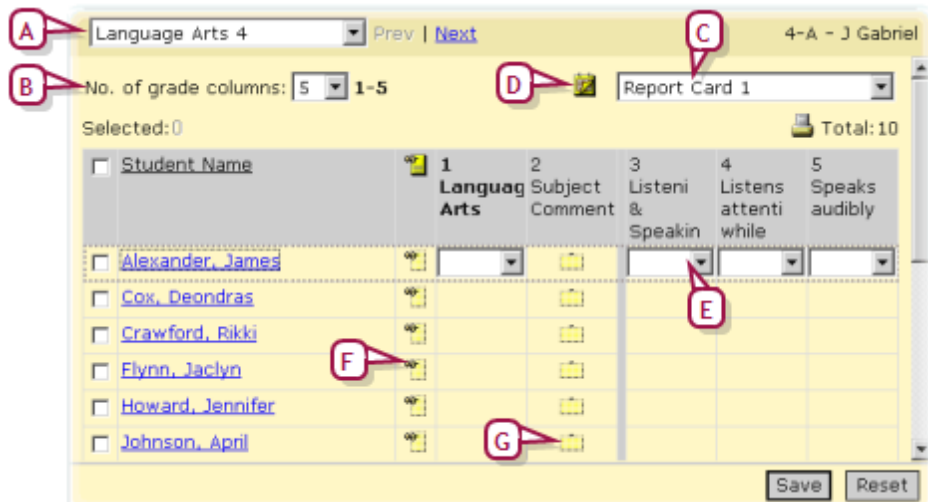
A Subject/class: Enables you to assign grades for another subject or class. You can also click **Prev** or **Next** to switch classes.

B **No. of grade columns**: This enables you to increase the page's legibility by limiting the number of columns displayed. (Where a grading period has more than one item on which each student is to be graded, each item has its own column.)

C Grading period: Enables you to assign grades for a different grading period.

D Class tooltip: Hold the cursor over this tooltip to view teacher, term, meeting pattern, and room information for this class.

E Grade assignment: Select a grade to assign. The **Legend** [*Figure 56*] describes the grades available.

F Comment: To view a comment, move the cursor over the icon.

G Standard comments: Click to add standard comments; that is, grading comments that have been pre-configured.

Figure 56: Grade legend example

Assigning grades to one student

You can assign grades to an individual student.

To assign grades to a student:[T, SS, SA][1]

1 Locate and view the student record [p. 37]. The Edit Student Demographics page appears.
2 In the control bar, click **Grades**. The Student Grades page appears [*Figure 57*].
   - The Student Grades page initially displays the current grading period and the student's current grade level.
   - The **Legend** [*Figure 56*] displays the grade codes available for use on this particular Student Grades page.
3 Assign a grade for each grading item.
4 Click **Save**.

Figure 57: Student Grades page

A Grade level: More than one grade level may be available.
B **No. of grade columns**: This enables you to increase the page's legibility by limiting the number of columns displayed. (Where a grading period has more than one item on which each student is to be graded, each item has its own column.)
C Grading period: Enables you to assign grades for a different grading period.
D Grade assignment: Select a grade to assign. The **Legend** [*Figure 56*] describes the grades available.
E Standard comments icon: To add a pre-configured comment, click the icon.

Assigning grades to a class in a past grading period

You can enter a student's grade for a class in a previous grading period; that is, a grading period that occurred before the student was scheduled into the

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[1]You can do this if your role is Teacher, School Secretary, or School Administrator.

class [p. 280]. This is useful when a student transfers in from another school or district.

To assign grades to a past grading period:[SS, SA][1]

1 Locate and view the student record [p. 37]. The Edit Student Demographics page appears.
2 In the control bar, click **Schedule**. The Student Schedule page appears.
3 Click the **Backfill Grades** check box for the class.
4 In the control bar, click **Grades**. The Student Grades page appears [*Figure 57*].
5 Select the grading period and enter the grades.
6 Click **Save**.

Assigning pre-defined grade comments

If your school has been set up to use standard comment grading tables [p. 204], you can assign standard comments—that is, pre-configured grade comments that appear on report cards and progress reports—to students. Examples of standard comments include: "Often tardy to class", "Attitude has improved", "A pleasure to have in class", "Frequently disrupts class" and so on.

To assign standard comments:[T, SS, SA][2]

1 On the Grades [*Figure 55*] or Student Grades page [*Figure 57*], in the appropriate grade column, click the standard comments icon [*Figure 57*]. The Student Standard Comments page appears.
2 Double-click a comment to select it.
   - To select multiple comments, enter the codes in the Comment code field and click **Add**.
   - To filter comments by category, select a category from **View**.
3 Click **OK**.

Table 17: **Permissions pertaining to assigning grades**

To	You need this permission	Details	Set to
Assign, edit, or delete grades	**Grading> Add Grades**	[p. 672]	Yes
Assign grades for a student for a prior grading period	**Grading > Backfill Grades**	[p. 673]	Yes
Change the grades of an elementary student where those grades were assigned by another user	**Grading > Edit Grades from Other Teachers**	[p. 673]	Yes
Change the grades of a secondary student where those grades were assigned by	**Grading > Enter Grades for All Classes**	[p. 674]	Yes

[1]You can do this if your role is School Secretary or School Administrator.
[2]You can do this if your role is Teacher, School Secretary, School Administrator.

To	You need this permission	Details	Set to
another user			
Change a student's grades for a past grading period	**Grading > Modify Grades for Completed Periods**	[p. 676]	Yes
Change a student's grade that has been calculated by PowerSchool SMS	**Grading > Override Calculated Grades**	[p. 676]	Yes

Programs

A *program* is a specialized activity or course of study that is an enhancement to or a replacement for a regular academic program and is subject to controlled enrollment. To enroll in such a program, a student must apply to it and be offered a position. A District Administrator defines the programs that are available for use in the system and assigns them to schools. A School Administrator can modify such programs for use at a school. For further information, refer to the 📄 *Program Management Guide*.

Resources

A *resource* is a service that a student may receive in addition to standard instruction via classes, courses, homerooms, or programs. Examples of resources include Remedial Reading, Speech Therapy, and Gifted and Talented Enrichment. A District Administrator defines the resources that are available for use in the system and assigns them to schools. A School Administrator can modify such resources for use at a school [p. 280].

You can view the resources that students are receiving and view the students for each resource.

To view resources and the students receiving them]:[SS, SA][1]

1   In the **School** menu, click **Scheduling**. The Scheduling page appears.
2   Click **Resource Services**. The Resource Services page appears [*Figure 58*].
    *   Or, to view the students who are receiving a resource, click **Resource Roster**. The Resource Roster page appears.
3   In the **Resource Service Name** column, click the resource's name to view it.

Figure 58: Resources Services page

	Resource Service Name	Service #	Default Teacher
	Reading		Breedlove, Marcelo
	StaffRewriteTestServ		SR Last-name, SR First-name S

Selected: 0   Total:2

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[1]You can do this if your role is School Secretary or School Administrator.

About student behavior

You can record an event of unusual student behavior or circumstances of concern that merit monitoring or action on the part of school staff. The record, a *student behavior incident*, covers traditional behavioral infractions, such as bullying or abusive language, as well as non-disciplinary concerns such as poor attendance or a sudden drop in academic performance, and positive behavior such as strong academic performance.

Typically, a student behavior incident is associated with a particular student. However, one incident can also be associated with several students or no students at all until an association is possible; for example, you can record the vandalizing of lab equipment or a swarming in the playground before ascertaining who was responsible. For serious or complex incidents such as those that involve violence, you can record victims, witnesses, and the names of other people involved. These people might include students and school staff, or people outside the school, such as police, parents, drivers, or students from other schools.

When an administrator records an incident, he or she categorizes it, rates its *severity*, and describes one or more *events or concerns* [*Figure 59*]. Once an incident is recorded, a Teacher or District or School Administrator can add details to it and assign to each student involved one or more *actions*, such as tutoring, a suspension, or counselling. Each action is made up of one or more *action steps*, such as a letter to parents or a transfer to another class, which an administrator can tailor to each student involved [p. 99].

Figure 59: Student Behavior incidents

	Incident Number	Incident Start Date	Incident Severity	Primary	Event or Concern	Action
☐	9	Mar 05, 2007	Moderate Incident	April, Stan; Giffin, Amira; Hilario, Bennett; Brooker, Vonda	Alcohol	In-school suspension; Physical Activity; Privilege restriction
☐	13	Feb 01, 2007	Mild Incident	Whicker, Wanda	Fighting	Juvenile justice system
☐	58	Feb 26, 2011	Extremely Severe Incident	Barger, Jose	Won't stay seated	Suspended

Selected: 0   Total: 3

A Primary: The principal student involved in this incident, such as the instigator of an altercation or the student who won an award.

Note: The choices of categories, severity ratings, actions, and their associated steps are set up by a District Administrator to support district policies and procedures.

Table 18: Permissions pertaining to student behavior incidents

To	You need this permission	Set to	Details
View and edit incident records. Permission is granted according to incident category and severity level.	Student Behavior > Discipline Category Severity High Student Behavior > Discipline Category Severity Medium Student Behavior > Discipline Category Severity Low Student Behavior > Non-Discipline Category Severity High Student Behavior > Non-Discipline Category Severity Medium	Edit	[p. 761] [p. 762] [p. 759]

To	You need this permission	Set to	Details
	Student Behavior > Non-Discipline Category Severity Low Student Behavior > Academic Category Severity High Student Behavior > Academic Category Severity Medium Student Behavior > Academic Category Severity Low Student Behavior > Attendance Category Severity High Student Behavior > Attendance Category Severity Medium Student Behavior > Attendance Category Severity Low Student Behavior > Behavior Category 1 Severity High Student Behavior > Behavior Category 1 Severity Medium Student Behavior > Behavior Category 1 Severity Low		[p. 760] [p. 760]
View incident records for all students in the district and edit incident records at the user's school	Student Behavior > Cross-School Student Behavior Access	View	[p. 761]
View and edit incident records for all students in the district	Student Behavior > Cross-School Student Behavior Access	Edit	[p. 761]
Print the Student Behavior Summary	Reporting > Behavior Summary Report	View	[p. 696]
Change an attendance setting assigned by a student behavior action step	Attendance > Override Student Behavior Attendance	Yes	[p. 632]
Enroll a student who is assigned a student behavior action that restricts enrollment	Student Behavior > Override Student Behavior Enrollment	Yes	[p. 763]

Viewing a student behavior incident

Typically, school staff can view and edit behavior incidents owned by their school and incidents associated with students transferring into their school. School staff can assign actions only to students enrolled in their school. You can view all behavior incidents at the school or a particular student's record of such incidents. A District Administrator can view and edit behavior incidents across the system.

To view a student's student behavior incidents [T, SA, DA][1]:

1   In the **School** menu, click **Student Behavior**. The Student Behavior page appears.
2   Under **Basic**, search by the student's last name, his or her student number and/or other criteria. Under Search Results, PowerSchool SMS displays a list of incidents.
   - Under **Basic** or **Detail**, when you search by "Referred by", PowerSchool SMS searches both the "Referred by" and "Referred by (other)" fields.

---

[1]You can do this if your role is Teacher, School Administrator, or District Administrator.

- You can adjust the columns displayed [p. 24] to include "School" and "Referred by".

3 In the **Incident Number** column, click an incident's number.
The Edit Behavior Incident page appears [*Figure 61*] [*Figure 62*] [*Figure 63*]. Information includes:
- **Incident category**: This category [*Figure 60*] determines many of the choices available for describing the incident. The categories available depend on your role [p. 12]. The category determines which roles can view the incident record [see *: Permissions pertaining to student behavior incidents* p.89].
- **Incident start**: The date and time the incident occurred.
- **Incident end**: The date and time the incident concluded.
- **School**: The school at which this incident was recorded.
- **Referred by**: The staff member who first described this incident.
- **Referred by (other)**: Any other person or organization that described this incident, such as the police or a passerby.
- **Overall incident severity**: The severities available depend on your role [p. 12] and are associated with the choice of Incident Category. The severity determines which roles can view the incident record [see *: Permissions pertaining to student behavior incidents* p.89].
- **Incident description**: Additional comments and information pertaining to the incident, to a maximum of 8000 characters.
- <u>Additional Incident Details</u>: Enables you to add details on such topics as location, weapon, and police involvement [see p.95].
- **Persons Involved** panel: Displays a list of people associated with this incident [*Figure 61*]. You can add or remove students and add or remove people as primaries, witnesses, or victims [p. 93].
- **Events or concerns** displays the events or concerns at the center of this incident [*Figure 62*]. An incident must have at least one event or concern see *Adding incident events or concerns* [p. 96].
- **Actions** lays out the actions assigned to each student involved [*Figure 63*].

4 Click **OK** to close the record.

Figure 60: Student Behavior Incident number

A Incident number and the date the incident record was created.

Figure 61: Student Behavior Incident: Persons Involved

A **Select School Student**: Enables you to add a student at the school as a primary, witness, or victim. This involves a search of student records [p. 37].

B **Select District Student**: Enables you to add a student in any school in the district as a primary, witness, or victim. This involves a search of student records [p. 37].

C **Select Staff**: Enables you to add a school staff member as a primary, witness, or victim. This involves a search of staff records [p. 216].

D **Add Other**: Enables you to add the name and contact information for a person as a primary, witness, or victim.

E **Remove**: Deletes the selected person(s) from the list of those involved.

Figure 62: Student Behavior Incident: Events and Concerns

A **Event/Concern**: Click the name to view it. **Note**: Each incident record must hold at least one event/concern.

B **Add**: Enables you to add an event/concern to this incident record [p. 96].

C **Delete**: Deletes the selected event/concern(s) from this incident record.

Figure 63: Student Behavior Incident: Actions

A Student: The student to whom the action applies.
B **Action**: Each action is associated with a particular student. Click the action's name to tailor it to this student [p. 98].
C **Action step(s)**: Click the action steps' name to view or change them.
D **Add**: Enables you to add an action to this incident record.
E **Delete**: Deletes the selected action(s) from this incident record.

To view all student behavior incidents: [T, SA, DA][1]

1 In the **School** menu, click **Student Behavior**. The Student Behavior page appears [*Figure 59*].
2 Click Display All Records.
   • Or use **Student Behavior Search** to find incidents associated with a specific student, event/concern category, or action.
3 In the **Incident Number** column, click an incident's number. The Edit Behavior Incident page appears [*Figure 61*] [*Figure 62*] [*Figure 63*].
4 Click **OK** to close the record.

Recording a student behavior incident

Recording an incident involves setting up a basic incident record, which you can do for one student, for several students, or none at all. Once the incident is recorded, you have the option of adding or adjusting its information at any time [*Viewing a student behavior incident* p.90], such as the other people involved, additional events and concerns, and actions to be taken.

To record a student behavior incident for a student:[T, SA, DA][2]

1 On a student's record, in the control bar, click **Student Behavior**. The Student Behavior page appears.

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[1]You can do this if your role is Teacher, School Administrator, or District Administrator.
[2]You can do this if your role is Teacher, School Administrator, or District Administrator.

- Or, on a student's Demographics page [p. 56].
2 Click **Display All Records**. PowerSchool SMS displays a list of incidents.
3 In the **Actions** menu click **Add Behavior Incident**. The Add Behavior Incident popup page appears.
- Or, you on the Edit Student Demographics page [p. 55], in the **Actions** menu click **Add Behavior Incident**.
4 Enter or change information, which includes the information on an incident record see *Viewing a student behavior incident* [p. 90] as well as the following:
- **Show Only Events/Concerns That Relate to the Selected Incident Category**: May be pre-set by a District Administrator, in which case, this option does not appear.
- **Show All**: Displays all Available Event/Concerns, not just those related to the Incident Category. May be pre-set by a District Administrator, in which case, this option does not appear.
- **Available Events/Concerns**: Available events/concerns that apply to the chosen Incident Category. Move selected events/concerns to the **Selected** list. An incident must have at least one event/concern selected.
- **Available Actions**: The action that apply to the chosen Incident Category. Move selected actions to the **Selected** list. (Appears only when you record an incident start from a student record.)
- **Action Start Date**: The start date for the selected actions. (Appears only when you record an incident start from a student record.)
- **Action End Date**: The end date for the selected actions. (Appears only when you record an incident start from a student record.)
5 Click **Continue**. PowerSchool SMS creates an incident record and the Edit Behavior Incident page appears.

To record a student behavior incident for several students at once:[T, SA, DA][1]

1 Perform a search to locate the relevant students' record(s) [p. 37]. The Student Search results page appears.
2 Select the student(s) whom you want to record as the Primary person(s).
3 From the **Actions** menu, click **Add Behavior Incident**. The Add Behavior Incident popup page appears.
4 Set options.
5 Click **Continue**. PowerSchool SMS creates an incident record and the Edit Behavior Incident page appears.

To record a student behavior incident for no particular students:[T, SA, DA][2]

1 In the **School** menu, click **Student Behavior**. The Student Behavior page appears.

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[1]You can do this if your role is Teacher, School Administrator, District Administrator.
[2]You can do this if your role is Teacher, School Administrator, or District Administrator.

2 In the **Actions** menu click **Add Behavior Incident**. The Add Behavior Incident popup page appears.

3 Set options.

4 Click **Continue**. PowerSchool SMS creates an incident record and the Edit Behavior Incident page appears.

5 Click **OK** to close the record.

Additional incident details

You can add details to a student behavior incident, specifically the exact location, scheduling group, period and class, times, influencing factors such as gangs or drugs, the use of weapons, legal implications, police involvement, costs, and links to other incidents. Since such detail is useful in resolving an incident, include as much information as you can.

To add details to a student behavior incident [SA, DA[1]]:

1 Locate and view the incident record [p. 90]. The Edit Behavior Incident page appears.

2 Click **Additional Incident Details**. The Additional Incident Details page appears.

3 Adjust the information, which includes:
- **Location category**: The category of the primary location of the incident; for example, "On school grounds".
- **Location**: The specific location where the incident occurred. The choices available in the selection list depend on the Location Category.
- **School building**: The school building in which the incident occurred.
- **School room**: The room where the incident occurred. The choices available depend on the School Building chosen.
- **Other location details**: Additional information about the location where the incident occurred.
- **Scheduling group**: Specifies the scheduling group of the class in which the incident occurred.
- **Period**: Specifies the period of the class in which the incident occurred. The periods available are determined by the Scheduling Group chosen.
- **Class**: The class in which the incident occurred. The classes available are determined by the Period chosen.
- **Time classification**: The general category of time in which the incident started; for example, "During school hours".
- **Time sub-classification**: The specific category of time in which the incident started; for example, "Period 1". The choices available depend on the Time Classification chosen.
- **Other time details**: A description of the time the incident started.
- **Factorsselected**: Factors that may have had a bearing on the incident; for example, "Gang involvement" or "Racial discrimination". Select these from the list of **Factors available**.

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[1]You can do this if your role is School Administrator or District Administrator.

- **Weapon category**: If a weapon was involved, the general category of that weapon; for example, "Firearm".
- **Weapon**: The specific weapon used in the incident.
- **Convictable**: Indicates that one or more of the people involved could be convicted for an offense related to the incident.
- **Police involvement**: Indicates that the police were contacted regarding the incident.
- **Police file number**: If police were contacted, the case or file number.
- **Charges laid**: Indicates that one or more of the people involved had charges laid against them.
- **Case outcome**: If charges were laid, the outcome of the case.
- **Estimated cost**: The estimated or actual cost of damages.
- **Drug description**: If drugs were a factor in the incident, a description of that drug.
- **Relate to incident number**: If this incident is related to another, that incident's number.

4   Click **OK**.

Adding incident events or concerns

A student behavior incident can involve more than one event or concern. You can add an event or concern to an incident record any time. The additional event or concern can involve one, some, or all of the Persons Involved.

To add an event/concern to a student behavior incident: [T, SA, DA[1]]

1   Locate and view the incident record [p. 90]. The Edit Behavior Incident page appears.
2   In the Events and Concerns panel, click **Add**. The Add/Edit Event/Concern page appears.
3   Add information, which includes:
- **Event/concern category**: The general category of event or concern; for example, "Academic" or "Behavior".
- **Event/concern sub-category**: A more specific category of event or concern; for example, "Sub-par performance" or "Substance Abuse". The choices available depend on the Category chosen.
- **Event/concern**: The specific event or concern. The choices available depend on the sub-category chosen.
- **Severity**: Assigned automatically based on the Event/Concern chosen.
- **Event/concern description**: A more complete description of the event/concern.
- **Requires police notification**: Indicates the police need to be notified of this event or concern. Set automatically for certain Events and Concerns see *Student behavior setup* [p. 265].
- **Requires specialized services notification**: Indicates that the office that provides specialized student services should be notified of this

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[1]You can do this if your role is Teacher, School Administrator, or District Administrator.

event or concern. Set automatically for certain Events and Concerns see *Student behavior setup* [p. 265].

- **Violates zero tolerance policy**: Indicates that the incident violates the district zero-tolerance policy. Set automatically for certain Events and Concerns see *Student behavior setup* [p. 265].
- **Persons involved**: Enables you to add this event/concern to some or all of the people involved.

4 Click **OK**.
- Or click **Save & Add** to add another event or concern.

Assigning follow-up behavior action

A student behavior incident may require follow-up action. You can assign an action to one, some, or all of the school's students on the list of Persons Involved. Once you have assigned an action to a student, you can tailor that action for each student [p. 99].

An action consists of at least one, usually several, action steps. Actions and their steps are set up by a District Administrator in accordance with district policies and procedures [*Student behavior setup* p.265].

To assign an action to a student behavior incident: [T, SA, DA[1]]

1 Locate and view the incident record [p. 90]. The Edit Behavior Incident page appears.
2 In the **Actions** panel, click **Add**. The Add Action page appears.
3 Add information, which includes:
- **Responsible person, school**: The school that employs the person responsible for overseeing the action.
- **Responsible person**: The school staff member responsible for ensuring the action is completed.
- **Responsible person (other)**: The name of the responsible person, if that person is not a staff member.
- **Action description**: A more complete description of the action.
- **Action category**: The general category of action.
- **Action sub-category**: A more specific category of action. The choices available depend on the Action Category chosen.
- **Action**: The specific action to be taken. The choices available depend on the Action Sub-category chosen
- **Action type**: The district's categorization of the chosen action [*Student behavior setup* p.265], which PowerSchool SMS displays automatically.
- **Action severity**: The district's assessment of the action's severity [*Student behavior setup* p.265], which PowerSchool SMS displays automatically.
- **Selected action steps**: The steps involved in taking this action. Chosen from the **Available action steps**. Note: An action must involve at least one step.

[1]You can do this if your role is Teacher, School Administrator, or District Administrator.

- **Persons involved**: Enables you to associate with this particular action some or all of the students from the list of Persons Involved in this incident. To be selected for an action, the student must be enrolled at this incident's "Referred by, school" [p. 90].
- **Related Events or Concerns**: Enables you to associate one or more of this incident's Events and Concerns with this particular action.
- **Demerits**: The number of demerits assigned to this action. This information is useful for custom reports [p. 127]. Accepts up to four digits followed by one decimal place.
- **Related to Specialized Services hearing**: Indicates that this action is the result of a hearing for a student who receives specialized services.
- **Zero tolerance policy**: Indicates that this action is related to a zero-tolerance policy.
- **Total time required**: The time in hours or days required to complete the action.
- **Previously completed**: The time in hours or days that the person associated with this action has committed to the action prior to the action being recorded in this incident record.
- **Discrepancy reason**: If the person associated with this action has not or does not intend to commit the Total time required for the action, the reason for this.

4 Click **OK**. The Edit Behavior Incident page appears.
- Or click **Save & Add** to add another action.
- Note: Once you save an action, any subsequent changes to that action apply only to the student for whom it was created [p. 98].

Editing a behavior action

While you can assign a student behavior action to several students at once, you can tailor that action for each student. Tailoring involves adding and removing action steps, linking to the relevant events and concerns, and recording additional details. You also have the option of tailoring each action step [p. 99].

Note: The steps associated with some actions may automatically affect student attendance [*Attendance setup* p.181], as in the case of suspensions, or student enrollment; for example, a student expelled from one school might be prevented from enrolling in another district school.

To edit an action for a student: [T, SA, DA[1]]

1 Locate and view the student behavior incident record [p. 90]. The Edit Behavior Incident page appears [*Figure 63*].
2 In the **Actions** panel, in the **Action** column, under the student's name, click the action's name. The Edit Action page appears displaying the student's name in its title.
3 View the following information, which PowerSchool SMS determines based on the information in the incident record:
- **Action created**: The date the action was created.

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[1]You can do this if your role is Teacher, School Administrator, or District Administrator.

- **Target action start date**: The earliest start date specified for the action steps associated with this action.
- **Target action end date**: The latest end date specified for the action steps associated with this action.
- **Actual completion date**: The date that the student completed the last action step associated with this action.
- **Current enrollment status**: Indicates that the student is active or inactive [p. 53].
- **Receives Specialized Services**: Indicates that the student receives specialized services.
- **Total past suspension days**: The total number of suspension days assigned to this student for days prior to the current date.
- **Total future suspension days (incl. today)**: The total number of suspension days assigned to this student for the current date and for the days after the current date.

4 Adjust, as necessary, the action's general information, which consists of the information on an action record see *Assigning follow-up behavior action* [p. 97].

5 Tailor each action step for this student [p. 99], as necessary [*Figure 64*].

6 In the **Related Events or Concerns** panel, select the events or concerns [p. 96] associated with this particular action for this student.

7 In the **Additional Action Details** panel, record any details specific to this action for this student [p. 95].

8 Click **OK**.

Figure 64: Action steps

Editing an action step for a student

When you set up an action step [p. 97], you choose a general category for the step. Tailoring an action step involves providing more detail and setting the time frame for the step's start and completion.

To edit an action step for a student: [T, SA, DA[1]]

1 Locate and view the student behavior incident record [p. 90].
The Edit Behavior Incident page appears [*Figure 63*].

2 In the **Actions** panel, in the **Action** column, under the student's name, click the action's name. The Edit Action page appears displaying the student's name in its title.

3 In the **Action Steps** panel, in the **Step** column, click the step's name [*Figure 64*]. The Edit Action Step page appears.

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[1]You can do this if your role is Teacher, School Administrator, or District Administrator.

- Or add an action step: in the **Actions** menu click **Add Action Step...**.
4 On the Edit Action Step page, change information as necessary, which includes:
- **Action step category**: The general category of step.
- **Action step**: The specific step. The steps available are determined by the Action step category.
- **Description**: A more detailed description of the step and its purpose.
- **Action step status**: The current status of the step, such as "Active" or "Pending".
- **Start date**: The date on which the step is expected to begin. To add a date range, in the **Actions** menu click **Add Date Range**.
- **End date**: The date on which the step is expected to conclude.
- **Start time**: The time of day on which the step is expected to begin.
- **End time**: The time of day on which the step is expected to end.
5 Click **OK**.
- Or click **Save & Add** to add another Action Step.

Academic plans

School and district staff can use an *academic plan* to help guide a secondary school student toward meeting the academic requirements for graduation, as mandated by the district. In PowerSchool SMS, an academic plan consists of a list of course groups. Each group has a minimum number of credits that the student must earn from his or her choice of courses in that group. An academic plan also has a time frame for which it is valid and optional rules regarding achievement and aptitude test results. Typically, a Counselor [p. 246] is assigned to a student to guide and monitor the student's progress relative to his or her plan [p. 101].

A District Administrator creates academic plans in PowerSchool SMS for use in the district [p. 269]. The District Administrator can specify a particular plan as the default, which is available to assign to all secondary school students in the district [p. 269]. If more plans than the default are available and system permissions allow it, a School Administrator can view the academic plans available and assign a different plan to a student) [p. 105].
Note: An administrator can search for students [p. 37] by academic plan version or Counselor and display either in a search results view [p. 48].

Table 19: Student academic plan permissions

To	You need this permission	Details	Set to
View a student's academic plan.	**Academic Planning > Student Academic Plan**	[p. 621]	View
View academic plans available in the district.	**District > Academic Plan Setup**	[p. 634]	View
Change a student's assigned academic plan.	**Academic Planning > Override Student Academic Plan Version**	[p. 621]	Yes
Assign an academic plan to several students at once.	**Academic Planning > Mass Assign Academic Plan**	[p. 620]	Yes

To	You need this permission	Details	Set to
Add, edit, or delete information on a student's academic plan.	**Academic Planning > Student Academic Plan**	[p. 621]	Delete
Add or edit information on a student's academic plan, except for notes.	**Academic Planning > Student Academic Plan**	[p. 621]	Edit
Add, edit, or delete notes attached to student's Academic Plan.	**Academic Planning > Student Academic Plan Notes**	[p. 622]	Delete
Change the School Counselor assigned to a student's academic plan.	**Students > Modify Counselor Assignment**	[p. 781]	Yes
Disable a user's ability to view or work with an academic plan.	**Academic Planning > Student Academic Plan**	[p. 621]	None

Viewing a student's academic plan

When an academic plan is assigned to a student, PowerSchool SMS maintains a record of academic credits earned toward its completion [p. 104], credits pending upon completion of courses in which the student is enrolled, and credits needed in course groups specified in the plan. This record enables a student's assigned School Counselor [p. 246] to help the student choose appropriate courses. Note: An academic plan is a useful guide—a student can graduate without completing his or her academic plan.

To view a student's academic plan:

1 Locate and view the student's record [*Searching for students* p.37].

2 In the control bar, click **Academic Plan**. The Academic Plan page appears [*Figure 65*].

- By default, PowerSchool SMS sorts the Courses list by Group then course priority. Select **Sort by Group/Year** to sort the list in ascending order of Group then calendar year then course priority.

Figure 65: A student's academic plan

A **Academic plan name**: The name of the academic plan assigned to this student.

B **Counselor**: The School Counselor [p. 246] assigned to this student. Click the pencil icon (if available) to change the Counselor. To assign a Counselor to more than one student, select a list of students and in the **Actions** menu, click **Assign > Values**. Note: When a counselor becomes inactive, he or she continues to appear in the counselor field until you assign the student a new active counselor.

C **Year entered 9th grade**: The year this student entered Grade 9. PowerSchool SMS uses this value to determine the plan to assign to this student by default [p. 278]. PowerSchool SMS derives the year from the student's record [p. 60] or calculates it based on the student's historical or current year data.

D **Sort by Group/Year**: Sorts the Courses list in ascending order of Group then calendar year then course priority. Does not apply to a printout of this grid [p. 27].

E **Current**: Displays information about courses the student is currently taking.

F **Forecast**: Displays courses that the student has completed, that are pending, or that the student is currently taking.

G **Rules**: Displays the student's status relative to the plan's aptitude and achievement requirements [*Figure 66*].

H **Notes**: Displays notes about this student's plan, such as the student's special interests or circumstances. A School Counselor or School Administrator can record notes.

I **Compare Plan**: Enables you to compare the student's current plan against a another plan available in the district [p. 106]. This is particularly useful when a student is struggling through an inappropriate plan. On the Compare Plan page, select another plan from **Compare Plan Version**. You can change the plan assigned to the student by selecting the plan at the top of the page and clicking **Apply**.

J **Group name**: The plan's course groups. The first row contains the plan name.

K **Courses**: On the **Current** tab, these are the plan's courses the student is currently taking. On the **Forecast** tab, these are the plan's courses that the student has either completed, has not completed, or is taking. Each retake of the same course is listed separately.

L **Grade**: Displays the student's grade level at the time he or she took the course. If a student takes a course more than once, this is the latest grade level.

M **Year**: Displays the year the student took the course.

N **Required credits**: Lists the credits associated with each course group and course. The first row lists the total number of credits required for the plan—the sum of all the groups' credits must equal this number.

O **Earned credits**: Displays the credits earned [p. 104]. PowerSchool SMS derives this information from the student's schedule for the current year and from their historical data for past years.

P **Pending credits**: Potential credits not yet earned for courses the student is taking. Only current year courses show pending credits. **Note**: The **Pending Credits** column is hidden when the **Current** tab is active.

Q **Status**: Displays the student's status relative to each course group see *Earning credits on an academic plan* [p. 104]. Refer to the status indicator legend.

R Credits collected from only one sub-group icon: Indicates that credits for the course group are collected from only one sub-group.

S **x.x/y.y:** Indicates that maximum credits have been specified for these courses. x.x = required credits, y.y = maximum credits.

T Status indicator legend.

U **Non-contributing course credits** see *Earning credits on an academic plan* [p. 104]

V Print: Click the icon to produce a printable version of this student's academic plan.

Figure 66: Academic plan graduation rules status

Current	Forecast	Rules	Notes	Compare Plan	
					Total:2
Rule	**Description**				**Status**
ACT Rule	Student must achieve 85% or greater on the ACT - American College Exam				🔴
SAT Rule	Student must achieve 75% or greater on the SAT - Standard Achievement Test				🟢

🟢 Completed 🔴 Incomplete

Earning credits on an academic plan

In a student's academic plan, PowerSchool SMS tallies earned credits [*Figure 65*] by course groups. When the student earns enough credits to meet the requirements of a course group, PowerSchool SMS applies the surplus credits to the next course group in the order of priority. The District Administrator sets the course group order of priority when creating the academic plan [p. 269].

For Permanent Record (PR) environments, the credit calculations are run as a nightly task. For non-PR environments, school administrators can manually update the credit calculations on the Calculate Grades, Credits, & GPAs page. (Refer to the 📄 *Permanent Record Guide*.)

On the student's academic plan page, PowerSchool SMS displays the student's current status for each course group and for the academic plan as a whole [*Figure 65*]. Possible states include:

- "Complete": Indicates that the student's earned credits meet the group's requirements.
- "In-progress": Indicates that the student has credit-awarding grade items [p. 84] pending for courses in the group.
- "Incomplete": Indicates that the student has no credit-awarding grade items pending.

When the student has earned enough credits to meet the credit requirements for all course groups in his or her plan, PowerSchool SMS designates the surplus earned and pending credits as non-contributing credits, that is, unused. Depending on how the academic plan is set up [p. 269], the surplus credits are either assigned to a designated course group or, on the student's Academic Plan page, PowerSchool SMS displays the courses with surplus credits in the **Non-contributing course credits** grid [*Figure 65*]; the display includes the reason for designation, which include:

- "Incorrect plan setup": The academic plan assigned to this student is set up incorrectly.
- "Overflow credits": The requirements of the course group to which these credits apply has been met.
- "Course does not exist in this plan": The course is not included in the student's academic plan.
- "No credits earned or pending": The student has taken a course included in the academic plan but no earned or pending credits are recorded for that course.
- "Dropped class": Grades were entered but no credits were earned and the student dropped the course before the final reporting period for the class. **Note:** If grades were entered and partial credits were earned before the class was dropped, the course appears in the plan with earned credits but no pending credits. If a credit-awarding course is dropped before the final reporting period and before any grades are entered, PowerSchool SMS does not include the course in the student's Academic Plan.

Assigning an academic plan

School or district staff can assign one of the academic plans available on the system [p. 106] to one or more students. Where a system's setup does not permit a choice of plans, a School Administrator can assign only the default academic plan, as designated by the District Administrator [p. 269]. A school or district staff member can assign an academic plan to one student or to several students at once. When working with a varied list of students, the staff member can have PowerSchool SMS automatically assign each student the appropriate plan according to the year the student entered 9th grade.

To assign an academic plan to a student:[DA, SA, C][1]

1 Locate and view the student's record [*Searching for students* p.37].
2 In the control bar, click **Academic Plan**. The Student Academic Plan page appears.
3 Click the update icon [*Figure 67*]. PowerSchool SMS displays a list of academic plans appropriate to this student. Select a plan from the list.
   - In the list of academic plans, a plan name preceded by an asterisk (*) indicates a plan that is suitable for this student.
   - Where a system's setup does not permit a choice of plans, PowerSchool SMS assigns the district's default academic plan to the student [p. 278].
   - If no plan is assigned to this student, the list of plans is set to "None" or, if no list is displayed, the icon is labeled **Update student plan with the district default** [p. 278].
4 Click **Apply**.
5 Click **OK**.

Figure 67: Assigning an academic plan
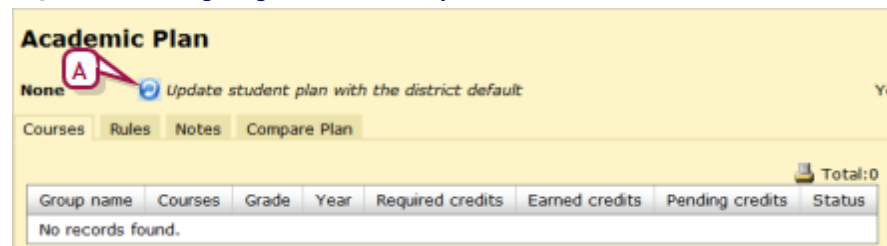
A   Update icon

To assign an academic plan to several students: [DA, SA, C][2]

1 Generate a list of students [*Searching for students* p.37].
2 Select the students.
3 In the **Actions** menu, click **Assign > Academic Plan**. A web page dialog appears.

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[1]You can do this if your role is District Administrator, School Administrator, or Counselor.
[2]You can do this if your role is District Administrator, School Administrator, or Counselor.

4 **Select a version** and choose one of the available academic plans.

- The **Select a version** option might not be available on some systems.
- Or, select **System will assign plan version based on student's year of entry into grade 9** to have PowerSchool SMS automatically assign the appropriate plan.

5 Click **OK**.

Viewing the plans available

A school or district staff member can view the details of any of the academic plans available on the system. Each plan is a *version* of an academic plan as set up by the District Administrator [p. 269]. Typically, each version covers a separate time period.

To view the academic plans available:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.

2 Under **Academic Planner**, click **Plan Setup**. The Academic Plans page appears [*Figure 68*].

- To view a plan version's setup, move the cursor over the plan version and click the magnifying glass. The Academic Plan Setup page appears [*Figure 69*].

Figure 68: Academic plans

A **Plan/Version**: Lists the academic plans available and one or more versions of each plan, the most recent version (in terms of year range) first. Red text and an exclamation mark indicate an incomplete plan setup [p. 269].

B **Credits Summary**: The course names and credits for the plan version.

C Academic plan

D Academic plan version

E Column border. You can change the column width by dragging its border.

F Setup icon: To view a plan version's setup [*Figure 69*], move your cursor over a row and click the icon.

Figure 69: Academic plan version setup

A **Plan name**: The name of this plan version.
B **Plan version start year:** The start year of this plan version.
C **Plan version end year**: The year this plan version concludes. "and beyond" indicates that the plan version has no end year [*Figure 68*].
D **Total plan version credits**: The number of credits a student needs to complete this plan version.
E **Plan Structure**: Defines the plan version's course and credit requirements [p. 272].
F **Rule Setup:** Displays aptitude and achievement requirements rules [p. 277].
G **Group name**: The groups and subgroups of courses that make up the plan. The first row contains the plan version name.
H **Required credits**: Lists the credits associated with each course group and course. The first row lists the total number of credits required for this plan version—the sum of all the groups' credits must equal this number. Red text followed by an exclamation mark indicates the number of credits where that number does not meet requirements. x.x/y.y indicate minimum and maximum credits.
I **Courses**: Lists the courses in each group and subgroup.
J **Non-standard credit collection settings**: This icon indicates that the credit collection settings for the group are not standard. To view the details, move your cursor over the icon.

Online course requests

Using Pearson's parent/student web site, *ParentCONNECTxp*[TM], a student can request courses for the coming term [*Figure 70*]. (A school administrator or a school counselor can also make such requests on the student's behalf for the purposes of scheduling [p. 347].) The student can request only those courses offered at the student's projected school [p. 151] for the next year, which are the appropriate grade level, which are in the student's assigned academic plan [p. 100], and for which the student has met the prerequisites. The student can request a course as a required course, an elective, or as an alternate; for example, Algebra 12 might be offered as an alternate to Math 12. The student is able to submit course requests only if the total scheduling load represented by those requests is under the maximum allowable load and over the minimum.

Also in ParentCONNECTxp, the student's parent or guardian can review and approve the student's *online course requests* [p. 231], using her own ParentCONNECTxp account [*Figure 71*], if such approval is required by the PowerSchool SMS system.

Figure 70: ParentCONNECTxp student course requests

A **Course Plan**: Click to view and make course requests.
B   The student's list of recommended courses.

Figure 71: ParentCONNECTxp parental approval pending
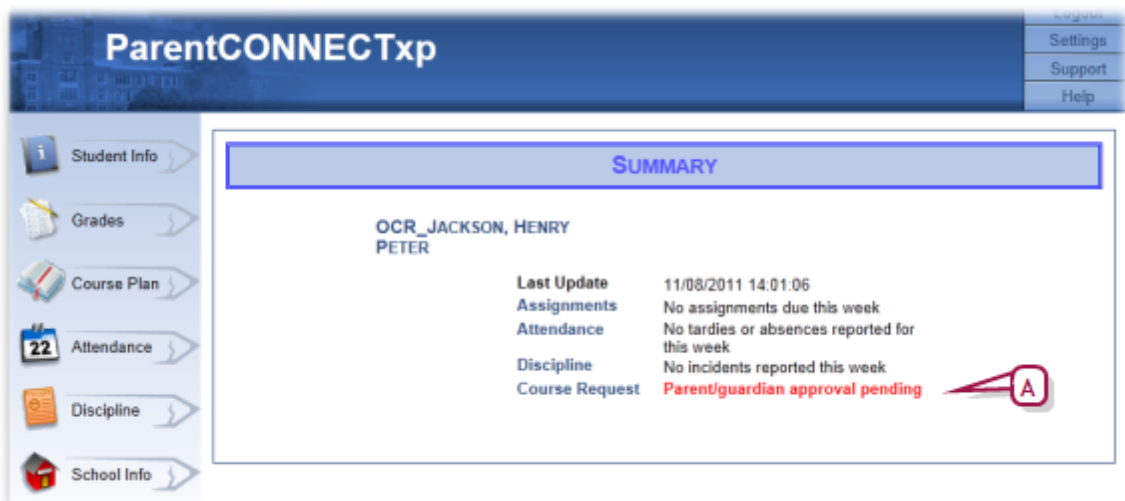
A **Course Request**: Indicates if approval is needed.

When the student submits (or the parent approves) these requests, ParentCONNECTxp transfers them to the school's PowerSchool SMS system. On that system, a counselor can review a student's course requests and (on a system where approval is required) approve or reject each request [p. 109]. When this process is complete, PowerSchool SMS publishes the student's approved requests to his planning schedule [p. 450].

In preparation for online course requests, a student's teacher or counselor can recommend courses as required courses or electives [p. 110]. Any recommended required course is automatically included in a student's course requests, unless the administrator has given students the option to override such recommendations [p. 232].

Note: Online course requesting is an optional feature of a PowerSchool SMS system. For a system to employ it, an administrator must set it up for a school [p. 231].

Note: PowerSchool SMS logs all online course requests and course recommendations [p. 163].

Table 20: Permissions pertaining to online course requests

To	You need this permission	Set to	Details
To make course recommendations.	**Students > Course Recommendations and Requests**	**Delete**	[p. 771]
To approve course requests submitted by students.	**Students > Course Requests Approval**	**Yes**	[p. 772]

Approving course requests

On a system where approval of a course request is required [>>], a counselor (and possibly a student contact such as a parent or guardian [p. 67]) has to approve or reject a student's course requests before PowerSchool SMS will

publish them to that student's planning schedule. On a system where approval is not required, a counselor can only view the requests after they have been published

To approve a student's course request(s): [SA, C][1]

1 In the Active Calendar [p. 172], search for [p. 37] the student.
2 Click the student's name. The Student Demographics page appears.
3 In the control bar, click **Academic Plan**.
4 In the control bar, under **Next Year**, click **Requests**. The New Year Requests page appears.
   - This page appears only if the school has created its Planning Calendar [p. 172].
   - If a counselor's approval is pending, PowerSchool SMS displays a notification to that effect at the top of the page.
   - You have the option of recommending additional courses [p. 108].
   - You may have the option of deleting a course request.
5 [Optional] Reject a course request: click **Email Parent/Student**.This enables the counselor to offer an explanation or set up a meeting.
6 To approve all course requests, click **Complete**. PowerSchool SMS publishes the course requests to the student's planning schedule(s).
   - PowerSchool SMS also clears any requests on that planning schedule.
   - Once PowerSchool SMS publishes the course requests, it makes the Next Year Requests page read-only.
   - If you have recommended additional courses, click **Apply** or **OK** before clicking **Complete**.

Recommending courses to students

A teacher or counselor can recommend one or more courses to one student at a time [p. 108] or many students at once, such as a teacher's entire class or a counselor's entire grade level [p. 108]. A course so recommended is automatically included in a student's course requests, unless the administrator has given students the option to override recommendations made by a counselor or a teacher [p. 232]. (Typically, the overriding of recommendations is not allowed in lower grade levels, such as 8 and 9, where program options tend to be fixed.)

When a recommendation is made to a student, PowerSchool SMS displays it in ParentCONNECTxp at the bottom of that student's priority list — the most recent recommendation receives the lowest priority [*Figure 70*].

If a teacher or counselor recommends a course to a student that has been previously recommended by another person, PowerSchool SMS displays a message to that effect. Alternate courses can be recommended by more than one person. A counselor or School Administrator can change

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[1]You can do this if your role is School Administrator or Counselor.

recommendations. A teacher can only change one of his own recommendations.

Note: A teacher or counselor can recommend a course to a student up until 9 p.m. on the day before the first day of the submission window [p. 232].

Note: For a teacher or counselor to recommend a course to a student, the school must have created its Planning Calendar [p. 172] and the Availability date [p. 231] for at least one grade level must be later than PowerSchool SMS's system date.

To recommend a course to more than one student: [SA, T, C][1]

1   In the Active Calendar [p. 172], in the control, click **Recommendations**.
2   Click <u>0 students selected</u>.
3   Select students.
    - A teacher can select students from one class or all his classes. For the latter, the teacher uses the **All My Students** filter option. When the students are selected, the link displays the number of students selected and the class from which they are drawn [].
    - A counselor can select students from the general student population by searching for them [p. 37].
    - A teacher or counselor can search for and select students who are projected to attend a school in the next year [p. 151], that is, not the counselor/teacher/Administrator's school by selecting **Include students projected to a different school**.
4   Click **OK**.
5   Under **Course Search**, find the course(s).
6   Recommend a course as required: Click and hold on the course and drag it to the grid's **Course #** column under **Course Recommendations** under **Required**.
    - PowerSchool SMS inserts a new row to accommodate a new course that the teacher or counselor drags to the grid.
    - PowerSchool SMS lists the course in order of priority from top to bottom. To change the priority of a course, drag it up or down the list.
    - To remove a course, move the cursor over it and click the remove course icon.
7   [Optional] Recommend a course as an elective: click **Elective** and drag the course to that grid.
8   [Optional] Recommend a course as an alternate to a recommended course: Drag the course to the **Alternate course # column**.
    - Columns for alternate courses appear in the grid only if the school's setup [p. 169] allows alternate courses [].
    - To replace an alternate course, drag another course onto it.
9   Click **Assign**. A confirmation message appears.
10 Click **OK**.

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[1]You can do this if your role is School Administrator, Teacher, or Counselor.

- If the system cannot assign the recommendations for some reason (such as the course has been previously recommended to a student), PowerSchool SMS displays a message that explains which courses and students are affected.

Figure 72: Recommendations page
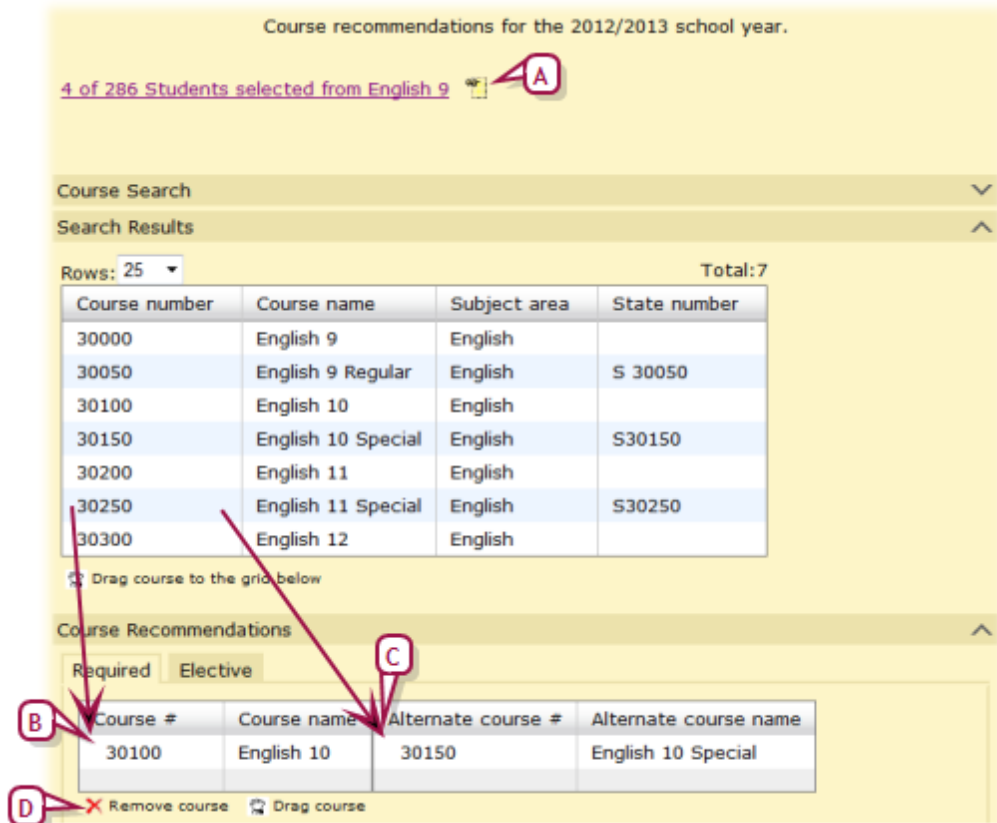
A Click to view the students selected.
More...
B Drag a course to the **Course #** column to recommend it.
C Drag a course to the Alternate # column to suggest it as an alternate to a recommended course.
D Remove course icon: Appears beside a course name when the user holds the cursor over that course. Click it to remove the course from the list.

To recommend a course to one student: [SA, T, C][1]

1 In the Active Calendar [p. 172], search for [p. 37] the student.
2 Click the student's name. The Student Demographics page appears.
3 In the control bar, click **Academic Plan**.
4 In the control bar, under **Next Year**, click **Recommendations**. The Next Year Recommendations page appears [].

[1]You can do this if your role is School Administrator, Teacher, or Counselor.

- This page appears only if the school has created its Planning Calendar [p. 174].

5   Under **Course Search**, find the course.

6   Recommend the course using the same procedure as that for recommending a course to more than one student [p. 108].

7   Click **Apply** or **OK**.

Reporting on information

A typical PowerSchool SMS system is equipped with a variety of *reports*. A report gathers information from the system according to particular search criteria; for example, daily attendance, enrollment, and grade statistics. Reports enable teachers and other school staff to run daily tallies and spot exceptions, school administrators to assess and plan, and district administrators to analyze trends and report to other levels of government.

A report assembles the information for presentation on screen, in print, or in your choice of data formats. You need to *run* a report for it to begin its information assembly process. At the time you run a report, you may have the option of specifying additional parameters by means of *preferences* and *filters*; for example, for a report that generates a list of students with failing grades, you could specify only students in Grade 12. You can have PowerSchool SMS run a report at a specific time or regular interval.

Once a report is run, you often have the option of adjusting the presentation of the results by sorting rows and adding or removing columns. Moreover, you can save results as a list for later use. You have the option of customizing some or all of the reports in a system [p. 127].

Report types

Three kinds of reports appear in a PowerSchool SMS system: built-in, package, and custom:

- *Built-in reports* [p. 594] are integral to PowerSchool SMS. Of the built-in reports, some are available to all users and others are made available only to specific roles by an administrator [*Making reports available* p.250]. Reports built into PowerSchool SMS prior to version 4.2 are known as *legacy reports*. The administrator can track the activity of these reports using SQL [p. 119].

- *Report Package reports* are part of the *PowerSchool SMS Report Package* [p. 130] of which there is one for each version of PowerSchool SMS. Report Packages are available at https://support.powerschool.com. Each Report Package contains a set of reports which the administrator of a PowerSchool SMS system can install and make available to users. Where the reports are already installed on a system, the Report Package gives the administrator the option of updating those reports with the latest version. The reports available to a user are specific to his or her role.

- *Custom reports* are reports of your own creation that you add to the system. You can develop custom reports using a report writing tool such as Crystal Reports [p. 279].

The District Administrator can control the specific reports available to a user or role [p. 12] using permissions see *<Report> permission* [p. 696].

Running a report

PowerSchool SMS displays the reports available for your role [p. 12] in several places:

- On the menu bar of any page, click **My Reports** [*Figure 6*]: The user can select the reports available from this menu [p. 19].
- On a District Reports page: In general, this is a comprehensive list of the reports in the system. However, the list may contain more reports than those you can run [*Figure 73*].
- In the **Reports** menu of particular pages [*Figure 73*], such as a page of student search results [p. 50].

Figure 73: Reports menu example
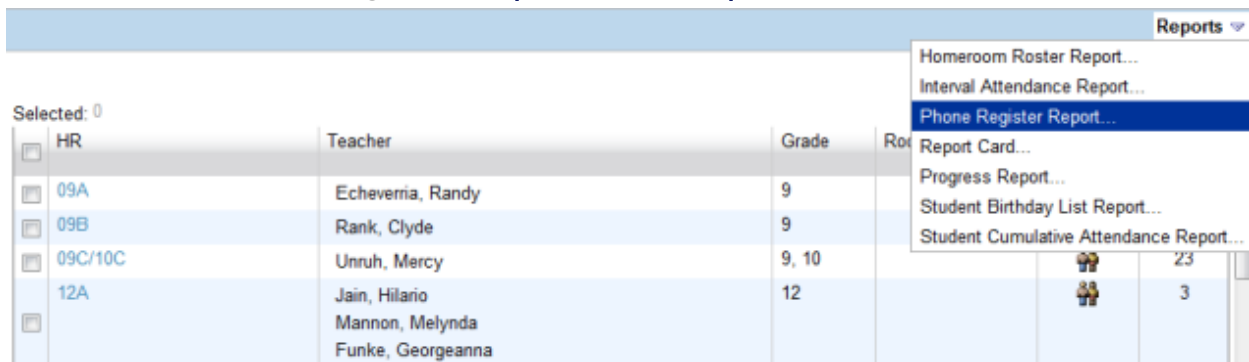
You can run a report at any time. A report may take some time to generate its results, especially on large systems or where the report gathers a broad range of information. A report can run in the background as you carry on with other work in the system. You can run another report before the first is finished. In this case, PowerSchool SMS puts the reports in a queue and runs up to two at once.

To run a report:

1 From the **Admin** menu, select **Reports**. The District Reports page appears.
2 In the list of reports, click a report name. The Report Options popup page appears.
   - Some of the reports listed may not be available to your role [p. 12].
   - On the District Reports page, PowerSchool SMS displays a link for every report on the system even for a report that is not currently available to run. Such a link is a placeholder—clicking it will not generate a report until a District Administrator uploads that report from the Report Package [p. 131] to the system [p. 136].
3 On the Report Options page, set report options, which for most reports include:
   - **Preferences**: These are optional parameters that the person who configured the report has included to increase the flexibility of the report; for example, a time span, specific classes, specific grade

levels. Preferences may also include optional information to include in the presentation of the report results.

- **Filters**: These optional parameters enable you to refine the scope of the report. **Note:** Since Filters refer to database field names, they are complex and suitable for use only by knowledgeable users.
- **Scheduling Options** [*Scheduling a report* p.117]
- **Output Options** [*Report results* p.123]: Controls how the report's results are presented. The default option is the print-ready Adobe Acrobat (pdf) format.
- **Saved report options**: Displays the most recent options setting you have used for this report (PowerSchool SMS displays this only if you have run this report previously and saved the options setting) [*Figure 75*]. You can accept the options setting and run the report, choose one of your named options settings to re-apply it, or choose to apply the report's default setting. Having made any of these choices, you can also adjust the report options further (and perhaps save that setting under a new name).

4   Click **Run**. The Report Status popup page appears. PowerSchool SMS displays information on the progress of the report, including a notice when it is complete.
- **Note:** When a report is processing, clicking **Cancel** might slow system performance. This is because a legacy report [p. 114] continues to run in the background until completed. (The District Administrator can retrieve the resulting PDF on the server designated as a Legacy Report Server [p. 399] in the folder "\Inetpub\wwwroot\ChancerySMS\tmpReports".)
- Or click **Save** to save the options setting for later re-use without running the report. PowerSchool SMS saves the options setting under a name of your choice.
- Or click **Save+Run** to save the options setting for later re-use and run the report. PowerSchool SMS saves the options setting under a name of your choice.

5   Upon completion, PowerSchool SMS displays a print-ready version of the report results [*Figure 74*].
- To print the report results, click the print icon [*Figure 74*] or in the web browser's **File** menu click **Print...**.
- To save the report results, click the save icon [*Figure 74*] or in the browser's **File** menu click **Save As...**. PowerSchool SMS saves the file in PDF format (Adobe Acrobat).

Figure 74: Print-ready report results example
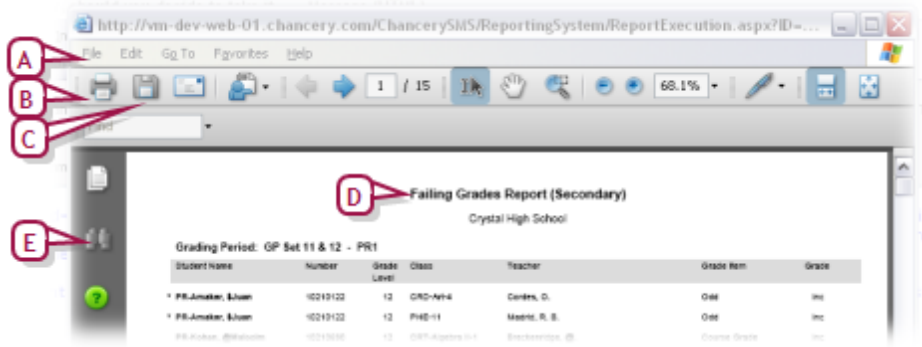
A The web browser's **File** menu
B Print icon
C Save icon
D Report results in a print-ready presentation. The results may consist of more than one page.
E Search icon: Search the report results for specific text.

Figure 75: Saved Report Options example
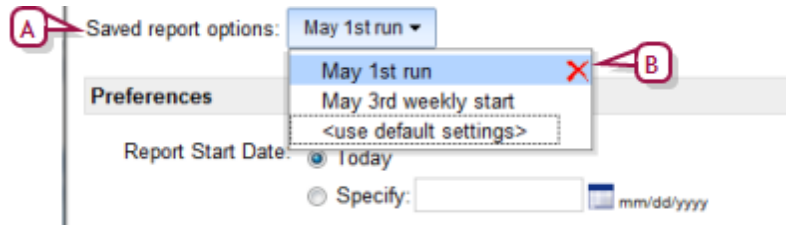
A **Saved Report Options**: Lists options settings that you saved previously for this report. The default choice is the most recently saved options setting. "<use default settings>" re-applies the report's default options setting.
B Delete: Click to delete a named options setting.

Scheduling a report

You have the option of scheduling a report to run once at a future time and date, or repeatedly at regular intervals. At the scheduled time(s), PowerSchool SMS runs the report automatically.

To schedule a report:

1 In the **Admin** menu, click **Reports**. The District Reports page appears.
2 In the list of reports, click a report name. The Report Options popup page for this report appears.
3 Open the **Scheduling Options** panel and enter or change information, which includes:
   - **Saved Report Options**: Displays the most recent options setting you have used for this report [*Figure 75*]. You can accept the options setting and run the report, choose one of your named options settings to re-apply it, or choose to apply the report's default setting.

- **Run now**: Sets the report to run once at the time you click **Run Report**. This is the default choice.
- **One time**: Enter the future date and time at which you want PowerSchool SMS to run the report. **Note:** If you inadvertently choose a past date and time, the report runs as soon as you click **Run Report**.
- **Recurring**: Select the interval at which you want PowerSchool SMS to run the report and the future date and time at which you want the interval to commence. The interval can be by hour, day, week, or month. **Note:** If you inadvertently choose a past date and time, the report runs the first time as soon as you click **Run Report**.

4 Click **Run Report**. PowerSchool SMS saves the schedule and displays a message to that effect.
- If you have changed the options setting, PowerSchool SMS displays a dialog that gives you to the opportunity to save the options as a new setting (enter a **Name**). Click **Continue** to save the setting and run the report. To not save the setting, do not enter a **Name**.

5 Click **Close**.

When you schedule a report, PowerSchool SMS adds the scheduled report to a list of reports on the home page [p. 15]. PowerSchool SMS also adds the scheduled report to the Report Management page [*Figure 76*] where you can view the details of all scheduled reports including the first and most recent times PowerSchool SMS has run it, and the name of the user who scheduled the report. You can also cancel a scheduled report.

Figure 76: Report Management page

A **Report**: A scheduled report that PowerSchool SMS has run. Click the title to view the most recent results.
B **Report**: A scheduled report that PowerSchool SMS has not yet run.
C **Status**: Indicates the state of the scheduled report. Potential states include Not Started, Downloaded (results have been generated in a print-ready format), and In Progress (scheduled to run at a future time).
D **Schedule**: Indicates the scheduling option for this report, that is, Recurring, One time, or N/A.
E **Recurrence**: Indicates the interval at which the report is scheduled to be run.

To view the results generated by a scheduled report:

1 On the home page [p. 15], under **Scheduled Events**, click **Reports**. The Report Management page appears.
- To view all reports scheduled by all users in your district, in the **Actions** menu click **Show All Reports....**

- To view only the reports scheduled by you, in the **Actions** menu click **Show My Reports...**.

2 Click the name of a scheduled report that PowerSchool SMS has run [*Figure 76*].
- Select a scheduled report that PowerSchool SMS has run [*Figure 76*] and in the **Actions** menu click **Download Report**. A **File Download** dialog appears. In the dialog, click **Open** to view the report results or click **Save** to save the report results to a storage location
- To delete a report, select it and in the **Actions** menu click **Delete Report**. You can delete multiple reports at once.

To cancel a scheduled report:

1 On the home page [p. 15], under **Scheduled Events**, click **Reports**. The Report Management page appears.
2 Select the report.
3 In the **Actions** menu click **Delete Scheduled Report**. A confirmation dialog appears.
4 Click **OK**. PowerSchool SMS removes the report from the Report Management page.

Calendar choice and reporting

The results of many reports depend on the PowerSchool SMS calendar with which you are working at the time you run the report. You can switch the calendar with which you are working [p. 171]. For example, reports concerning grades or student behavior would get more meaningful results from the *Active Calendar* (that is, the current year [p. 169]) whereas scheduling reports are better suited to a *planning calendar* (that is, a time period other than the current [p. 169]).

Monitoring reports using SQL

The administrator can use SQL statements to monitor PowerSchool SMS's reporting processes. For Report Package reports [p. 131], the administrator can use the system task table for this purpose [p. 119]. Even though built-in reports (also known as legacy reports) [p. 594] do not appear in this table, the administrator can monitor them using SQL [p. 123].

Using SQL statements to monitor Report Package report

The administrator can use simple SQL statements against the task table to find out which Report Package reports PowerSchool SMS is processing [see also *How PowerSchool SMS processes Report Package reports in the task table* p.121].

The following sample SQL scripts illustrate how to find reports in the task table. By adding more qualifiers to such scripts, the administrator can conduct very specific searches.

To show all reports—scheduled, recurring, or actively running:

    select * from CSL_SS_TASK (NOLOCK)
    where (TARGET_MACHINE_TYPE = 32 or TARGET_MACHINE_
    TYPE=256)

To show all actively generating (running) reports on the system (one time, scheduled, or recurring) at this point in time:

    select * from CSL_SS_TASK (NOLOCK)
    where (TARGET_MACHINE_TYPE = 32 or TARGET_MACHINE_
    TYPE=256 and STATUS=4)

To show all reports that are set up on a recurring schedule:

    select * from CSL_SS_TASK (NOLOCK)
    where (TARGET_MACHINE_TYPE = 32 or TARGET_MACHINE_
    TYPE=256) and RECURRENCE_TYPE<>0

When creating useful SQL statements, the administrator might find it useful to refer to the following columns in the CSL_SS_TASK table:

- **TYPE**: A description of the task, for example "Report/Export Execution Task" for reports and exports.
- **OWNER_USER_ID**: Where applicable, the User ID (login name) and User Role ID of the user generating the task. No value indicates a system-generated task.
- **DESCRIPTION**: Additional information regarding the task. If the task is a report, it will include the report name, for example, "Executing Student Absences and Tardiness by Grade...".
- **RECURRENCE_TYPE**: The type of recurrence method used.
  0 - Not a recurring task
  1 - Recurring in Minutes
  2 - Recurring in Hours
  3 - Recurring in Days
  4 - Recurring in Weeks
  5 - Recurring in Months
- **RECURRENCE_INTERVAL**: Increment of the recurrence_Type value set, for example, if the Recurrence_Type is set to 2 and the Recurrence_interval is set to 32, the task will repeat every 3 hours.
- **LAST_RECURRED_ON**: The last data and time the task was run, if it is a recurring task. If the task is not recurring or has not yet been executed, the value will show as 1/0/1900 0:00.
- **STATUS**: The current status of the task. The values are:
  NULL - N/A
  2 - Not Started
  3 - Completed
  4 - Running
  5 - Retrying
  6 - Failed

- **TARGET_MACHINE_TYPE**: This applies to which type of PowerSchool SMS server the task is intended to run on. The acceptable values are:
  4 - Directory Services
  8 - Database
  16 - Web
  32 - Reports
  64 - Gradebook
  128 - Scheduling
  256 - Reports (light)
  512 - Application
- **TARGET_MACHINE**: If the task is in progress, this will show you the specific server that is fulfilling the job.
- **LAST_ENDED_ON**: The last date and time the task was completed. If the task is not recurring or it has not yet been executed, the value will show as 1/0/1900 0:00.
- **LAST_STARTED_ON**: The last date and time the task was started. If the task has not started, the value will show as 1/0/1900 0:00.

How PowerSchool SMS processes Report Package reports in the task table

The CSL_SS_TASK table contains a list of all scheduled and running tasks. Since PowerSchool SMS treats a Report Package report as a task, it appears in the table when the report is set to run immediately, at a specified time, or on a recurring schedule.

The following examples illustrate how PowerSchool SMS processes a Report Package report through the CSL_SS_TASK table.

A. PowerSchool SMS executes a "Run now" report:
1 A task is created in the CSL_SS_TASK table to run the report.
2 A PowerSchool SMS Application Server specified to run reports picks up the task and generates the report. The task is still visible in the CSL_SS_TASK table.
3 The Crystal Reports engine requests data from PowerSchool SMS.
4 When PowerSchool SMS hands the required data successfully to the Crystal Reports engine, the task is deleted from the CSL_SS_TASK table.
5 The Crystal Reports engine generates the report and the report is returned to the user.

B. PowerSchool SMS executes a 'Run now' report and the browser window for the report is closed before the report is returned to the user:
1 A task is created in the CSL_SS_TASK table to run the report.
2 A PowerSchool SMS Application Server specified to run reports picks up the task and generates the report. The task is still visible in the CSL_SS_TASK table.

3 The Crystal Reports engine requests data from PowerSchool SMS.

4 When PowerSchool SMS hands the required data successfully to the Crystal Reports engine, the task is deleted from the CSL_SS_TASK table.

5 The Crystal Reports engine generates the report and a link to the report is found on the user's home page under Schedule Events - Reports.
- After viewing and/or saving the report, the user should delete the item from the page.

C. PowerSchool SMS executes a "One time" report at a scheduled time and date:

1 A task is created in the CSL_SS_TASK table to run the report.

2 At the scheduled date and time, a PowerSchool SMS Application Server specified to run reports picks up the task and generates the report. The task is still visible in the CSL_SS_TASK table.

3 The Crystal Reports engine requests data from PowerSchool SMS.

4 When PowerSchool SMS hands the required data successfully to the Crystal Reports engine, the task is deleted from the CSL_SS_TASK table.

5 The Crystal Reports engine generates the report and a link to the report is found on the user's home page under Scheduled Events - Reports.
- After viewing and/or saving the report, the user should delete the item from the page.

D. PowerSchool SMS executes a "recurring" report at a scheduled start time, start date, and interval (for example, every three hours starting on Jan 4 at 10:45am):

1 A task is created in the CSL_SS_TASK table to run the report.

2 At the schedule date, time, and interval, a PowerSchool SMS Application Server specified to run reports picks up the task and generates the report. The task is still visible in the CSL_SS_TASK table.

3 The Crystal Reports engine requests data from PowerSchool SMS.

4 When PowerSchool SMS hands the required data successfully to the Crystal Reports engine, the task is not deleted from the CSL_SS_TASK table.

5 The Crystal Reports engine generates the report and a link to the report is found on the user's home page under Schedule Events - Reports.

6 The task is still visible in the CSL_SS_TASK table.
- In this scenario, the task is only deleted from the CSL_SS_TASK table if the user who created the recurring report schedule deletes the report schedule from his or her home page under **Scheduled Events - Reports**.

Monitoring built-in reports

A built-in report does not appear in the task table [p. 119]. Instead it appears in the CSL_SMS_REPORT_QUEUE table. The administrator can monitor this type of report by using a SQL statement.

To view a list of built-in reports that are currently running:

Use the following SQL statement:

```
SELECT CSL_SMS_REPORT.NAME, CSL_SMS_REPORT_
STATUS.REPORT_STATUS_DESCRIPTION STATUS, CSL_
SMS_REPORT_QUEUE.* FROM CSL_SMS_REPORT_QUEUE,
CSL_SMS_REPORT, CSL_SMS_REPORT_STATUS
WHERE CSL_SMS_REPORT_QUEUE.ID_SMS_REPORT = CSL_
SMS_REPORT.ID_SMS_REPORT
AND CSL_SMS_REPORT_QUEUE.ID_SMS_REPORT_STATUS =
CSL_SMS_REPORT_STATUS.ID_SMS_REPORT_STATUS
```

Report results

By default, a report generates its results in the print-ready Adobe Acrobat (*.pdf) format. A report may give you the alternative of setting it to generate its results as a file in a format usable by other applications. The following file formats are available:

- Crystal Reports, for which the file extension is ".rpt".
- Microsoft Excel (*.xls)
- Microsoft Word (*.doc)
- Rich Text (*.rtf)
- Comma-separated values (*.csv)
- Tab-separated values (*.tsv)
- Plain text (*.txt)

To generate results to a specific file format:

1 In the **Admin** menu click **Reports**. The District Reports page appears.
2 Click the report's name. The Report Options popup page appears.
3 In the **Output Options** panel, click a **Report Format**.
    - For a report that does not offer **Output Options**, PowerSchool SMS generates the results as a PDF.
    - Select the **Output to file** check box to have PowerSchool SMS write the results to a file in a specific location. For **File**, type a file name. For **Path**, type a file path; for example, "C:\" is typically the root folder on your local computer, "C:\Documents and Settings\All Users\Desktop" is your Windows desktop. **Note:** If this check box is not selected, you can save the results to a file at the time they are generated.
4 Click **Run Report**. When the report runs, PowerSchool SMS generates results in the specified format.

Managing reports

The administrator of a PowerSchool SMS system can monitor the reports installed on that system using the report *PowerSchool SMS List of Reports*. This report is included in the PowerSchool SMS Report Package [p. 131]. The PowerSchool SMS List of Reports lists every report that is displayed on the Reports page, including custom reports, built-in reports, and those not available to run. For each report, the PowerSchool SMS List of Reports displays the version installed and the first compatible build.

Note: To run any report in the PowerSchool SMS Report Package [p. 131], the first time you upload the Report Package you must also upload the PowerSchool SMS List of Reports. This report contains a shared stored procedure used by all report package reports.

To view the PowerSchool SMS List of Reports: [SS, SA, DA[1]]

1   In the **Admin** menu, click **Reports**. The District Reports page appears.
2   In the **Administration Reports** panel, click **PowerSchool SMS List of Reports**. The Report Options popup page appears.
3   Choose options.
   *   You have the option of including reports you have customized.
4   Click **Run Report**. The report appears [*Figure 77*].

---

[1]You can do this if your role is School Secretary, School Administrator, or District Administrator.

A   Report category: These are the same categories that PowerSchool SMS displays to users on the District Reports page.

More...

B   **Template File Name**: The name of the report definition. The file name extension is .rpt.

C   **Revision**: The version of the template. When a report template is changed, the template revision number is increased.

D   **First Compatible Build**: The number of the oldest build of PowerSchool SMS on which this report can run.

E   **Custom**: This column indicates if a report is not a standard report provided by PowerSchool SMS. Instead, it is customized version of a standard report or an entirely new creation.

F   **Legacy**: This column indicates if a report is a report built into PowerSchool SMS prior to version 4.2 [p. 114]. Typically, a built-in report is not part of the Report Package.

Setting default report filters

Most reports have built-in options or preferences that the user sets before running the report. The user of a package report can also set filters. The

default filter which prompts the report user to enter specific filter criteria.

When a system user opens a report containing a default filter, PowerSchool SMS opens the **Filters** panel automatically to the default filter setting. The default filter criteria are displayed [*Figure 78*]. The user has the option of entering a value for the default criteria, entering no value, or setting different or additional criteria, or removing the filter criteria completely.

For suggested default filters for a given report, consult the description of that report in *PowerSchool SMS Report Package reports* [p. 533].

Figure 78: Default report filter example
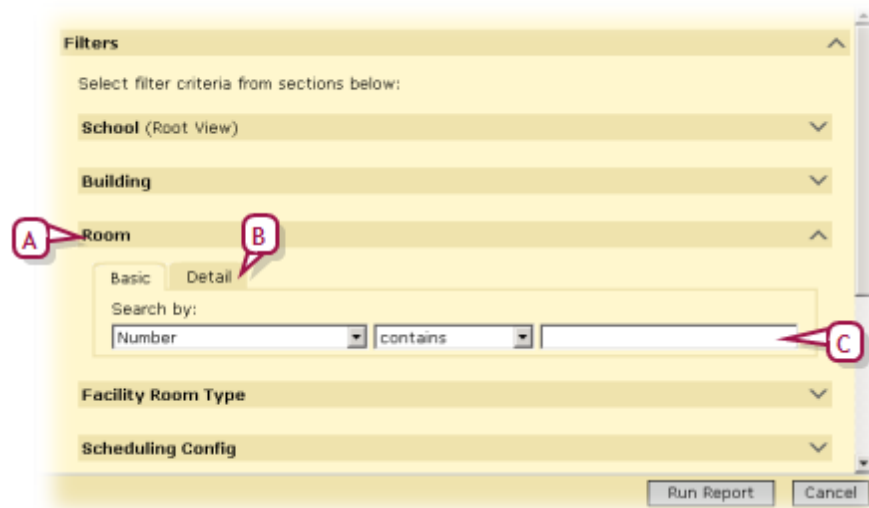
A   In this example, PowerSchool SMS automatically opened the **Filters** panel to **Room**. This is because a default filter is set for **Room** in which the user can have the report include rooms that include a particular "Number".

B   **Detail**: This tab enables the report user to change or remove the filter criteria.

C   Filter criteria: The report user can enter a value or leave it blank. **Note:** Text criteria are case-sensitive.

To define a default filter for a report [SA, DA[1]]:

1   In the **Admin** menu, click **District or School Setup. The District or School Setup page appears.**

2   Under **Reports**, click **Customize Reports**. The Customize Reports page appears or On the **School Setup** page, under **Customization**, click **Customize Reports**. The Customize Reports page appears.

3   Select a report and in the **Actions** menu click **Edit Filters**. The Report Filters popup page appears [*Figure 79*].

4   Set the desired filter(s).

5   Click **Save**.

6   Click **Close**. The Report Filters popup page closes.

[1]You can do this if your role is School Administrator or District Administrator.

Figure 79: Setting a default report filter

A In this example, the administrator has set the **Room** filter so that the user will be prompted to enter a particular "Room Number" [*Figure 78*].

Customizing reports

You can customize any of the reports available in PowerSchool SMS [p. 114]. Each report is defined by a report file (which has the file extension ".rpt") stored in the system. Customizing a report involves downloading the report from the system, editing the report using the third-party report-editing tool Crystal Reports, then uploading the customized report. This process replaces the old report file with a new file, which is stored in the system until you customize it further. **Note**: For instructions on how to develop and edit reports using Crystal Reports, refer to the 📄 *Report Writers Guide*.

A PowerSchool SMS system contains two types of reports, each of which you customize differently: package reports [p. 127] and built-in [p. 128].

Customizing a package report

These reports are available in *report packages* [p. 130], collections of reports for specific purposes that a system or District Administrator can install on a PowerSchool SMS system as needed.

To customize a package report [SA, DA[1]]:

1 Download the report from the system:
    a In the **Admin** menu, click **District or School Setup. The District or School Setup page appears.**
    b Under **Reports** or **Customization**, click **Customize Reports**. The Customize Reports page appears.
    c Select the report.

---

[1]You can do this if your role is School Administrator or District Administrator.

- To filter the list of reports, select a **Category**.
  d In the **Actions** menu click **Download Report Template**.
  The File Download dialog appears.
  e Click **Save**. The Save As dialog appears.
  f Specify a location and file name and click **Save**.
  - Use the file name extension ".rpt".
2 Open the report file in Crystal Reports and edit it.
3 Upload the edited report to the system:
  a In the **Admin** menu, click **District or SchoolSetup. The District or School Setup page appears.**
  b Under **Customization**, click **Customize Reports**. The Customize Reports page appears.
  c In the **Report Name** column, click the name of the report that you want to replace with the customized report.
  - To filter the list of reports, select a **Category**.
  d In the **Report File** panel, for **New report file (.rpt)**, click **Browse....** The Choose File dialog appears.
  e Locate and select the report file and click **Open**.
  - If **Use report file** appears, select the **Custom** check box.
  - If necessary, adjust the report's **Permissions** [*Making reports available* p.250]. These determine the roles [p. 240] to which this report is available.
  f Click **OK**.

Customizing a built-in report

Pearson developed built-in reports on an older reporting framework that dates from PowerSchool SMS version 4.2 or earlier. In general, the reports offer less flexibility than package reports in how you filter and generate results.

To customize a built-in report [SA, DA[1]]:

1 Download the built-in report from the system:
  a In the **Admin** menu, click **District Setup. The District page appears.**
  b Under **Reports, click Customize Pre-4.2 Reports. The Customize District Reports page appears.**
  c Click **District Report List. The District Report List appears.**
  - The **Type** column indicates which reports have been customized.
  d In the **District Report Name column, click the report's name. The Edit Report page appears.**
  - Or select the report and in the **Actions** menu click **Edit Custom Report**.
  e On the Edit Report page, in the **Report File** panel, for **Built in report file**, click **Download**. The File Download dialog appears.
  f Click **Save**. The Save As dialog appears.

---

[1]You can do this if your role is School Administrator or District Administrator.

g Specify a location and file name and click **Save**.
- Use the file name extension ".rpt".

2 Open the report file in Crystal Reports and edit it.

3 Upload the customized report to the system:

a In the **Admin** menu, click **District Setup. The District Setup page appears.**

b Under **Reports, click Customize Pre-4.2 Reports. The Customize Reports page appears.**

c Click **District Report List. The District Report List appears.**

d In the **District Report Name column, click the name of the report that you want to replace with the customized report.**

e Under **Report File**, for **New report file (.rpt)**, click **Browse.... The** Choose file dialog appears.

f Locate and select the report file and click **Open**.
- If **Use report file** appears, select the **Custom** check box.
- If necessary, adjust the report's **Permissions** [*Making reports available* p.250]. These determine the roles [p. 240] to which this report is available.

g Click **OK**.

Viewing PowerSchool SMS schemas

PowerSchool SMS provides a built-in *Data Dictionary* that enables report writers and others to look through PowerSchool SMSschemas for information about schema content.

To view PowerSchool SMS schemas: [SA, DA][1]

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.

2 Under **Reports**, click **Customize Reports**. The Customize Reports page appears.

3 In the **Actions** menu, click **Data Dictionary**. The Data Dictionary page appears.

4 Click **Choose Columns** [*Figure 80*]. The **Choose Columns to Display** dialog appears.

5 Select the information you want to view and click **OK**. The information you selected appears in the right-hand grid.
- When you leave the Data Dictionary page, your selections are retained.

6 Find the schema:
- Choose a schema from **Select a schema**.
- Or, enter all or part of the schema name in **Search for schema**. PowerSchool SMS displays in **Select a schema** schemas that match the characters you entered [*Figure 80*].
  - Use "%" to find a group of unknown characters.
  - Use "_" to find one unknown character.
  - Use "[ ]" to find a character in a set.

---

[1]You can do this if your role is School Administrator or District Administrator.

- Use "[^]" to find a character that is not in a set.
- To refine the results in **Select a schema**, choose from the following options:
  - **Schema:** This is the default option. PowerSchool SMS displays in **Select a schema** schemas that match the characters you entered.
  - **Column**: PowerSchool SMS displays in **Select a schema** schemas that contain a column that matches the characters entered in **Search for schema**.
  - **TABLE_NAME**: PowerSchool SMS displays in **Select a schema** schemas that contain the physical database table name that matches the characters entered in **Search for schema**.
  - **COLUMN_NAME**: PowerSchool SMS displays in **Select a schema** schemas that contain the physical database column name that matches the characters entered in **Search for schema**.

7　Choose the schema from **Select a schema**. The information from the schema you selected appears in the grids.

Figure 80: Data Dictionary page
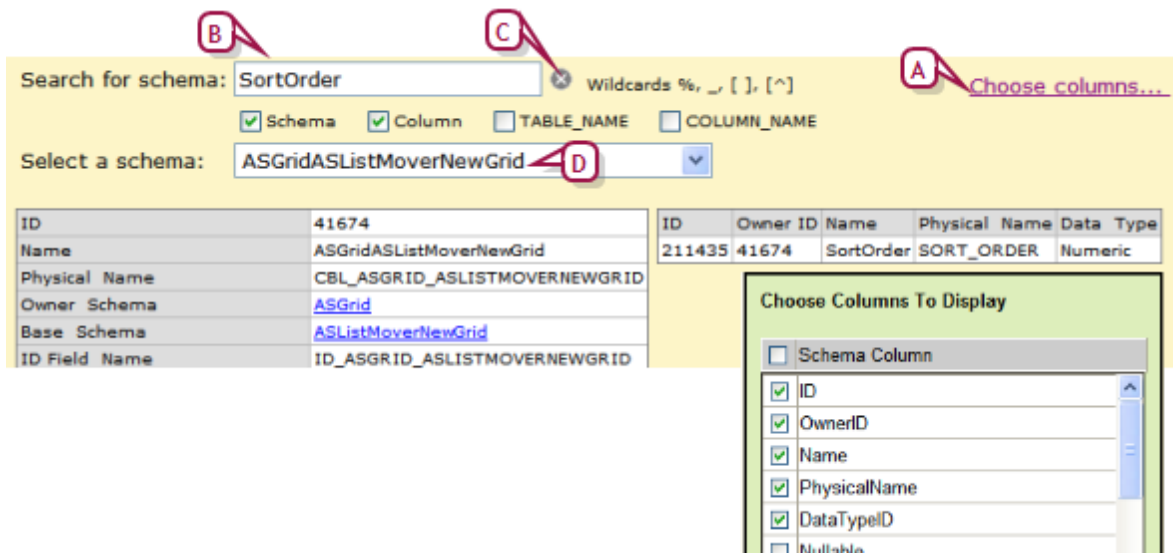
A　Click **Choose Columns** to select the information you want to view.
B　Search criteria.
C　Click the x to clear search criteria.
D　Schema that contains column name entered in **Search for schema**.

Report packages

A report package is a collection of standard reports available for use on any PowerSchool SMS system. Each package contains one or more reports, categorized by purpose, that supplement PowerSchool SMS's built-in reports. The*PowerSchool SMS Report Package* [p. 131] is essential to most systems.

A report package is intended for the use of an administrator of a PowerSchool SMS system, who can upload [p. 136] the reports in the package

to a system. Once the reports are uploaded, the administrator can go on to set default report filters [p. 125] and determine user access to the reports [*Making reports available* p.250].

PowerSchool SMS Report Package

The *PowerSchool SMS Report Package* contains a variety of reports that supplement PowerSchool SMS's built-in reports and are essential to the usefulness of an PowerSchool SMS system. Pearson upgrades the Report Package at regular intervals with new reports and improved versions of existing reports. By installing the most current Report Package on an PowerSchool SMS system, the District or School Administrator can keep that system's reports up to date. For a description of each report in the PowerSchool SMS Report Package, see*PowerSchool SMS Report Package reports* [p. 533].

The most current PowerSchool SMS Report Package is available for a District Administrator to download [p. 135] from the support web site, (https://support.powerschool.com). Once the package is downloaded, a District or School Administrator can upload some or all of the reports to a PowerSchool SMS system [p. 136].

The PowerSchool SMS Report Package consists of one compressed file named "RptPckg.zip". **Note**: The PowerSchool SMS Report Package also contains an optional file "[version]PR-RptPckg.zip". This file contains reports [p. 135] for use only on a system that has been converted to Permanent Record (PR).

"RptPckg.zip" contains all the reports in the package [, p.131]. The report package file also contains one zip file holding all the reports relevant to a specific feature area, including the following:

- Rpt-US-[version]-AddressValidation.zip
- Rpt-US-[version]-Attendance.zip
- Rpt-US-[version]-Behavior.zip
- Rpt-US-[version]-Generic.zip
- Rpt-US-[version]-Grading.zip
- Rpt-US-[version]-GridPrint.zip
- Rpt-US-[version]-Health.zip
- Rpt-US-[version]-OnlineCourseRequests.zip
- Rpt-US-[version]-PowerTeacherGradebookErrorReport.zip
- Rpt-US-[version]-Scheduling.zip
- Rpt-US-[version]-Testing.zip

Within these files, each report is stored as a separate zip file. The zip file name identifies the report; for example, "ADA Summary.zip". Typically, each report consists of four files:

- `[Report_Name].rpt`
  The report template.
- `[Report_Name].xml`

Contains the name, description, category, and attributes of the report. This file ensures the presence of the other files when a District Administrator uploads the report to a PowerSchool SMS system.

- `[Report_Name]-Create.sql`

  Contains stored procedures necessary for PowerSchool SMS to run this report. Implements the report extensibility feature.

- [Report_Name]-Drop.sql

  Contains stored procedures necessary for PowerSchool SMS to run this report.

Table 21: **Reports in Report Package**

Feature area	Reports included	Details	Report file name
Address Validation	Address Out of Zone	[p. 533]	Address Out of Zone.rpt
Administration (.zip file name = Generic)	PowerSchool SMS List of Reports	[p. 533]	PowerSchool SMS List of Reports.rpt
Attendance	Daily Absence by Attendance Code	[p. 535]	Daily Absence Report By Attendance Code.rpt
	Daily Absence by Period	[p. 534]	Daily Absence Report By Period.rpt
	Period Attendance	[p. 535]	Period Attendance Report.rpt
	Student Cumulative Attendance	[p. 537]	Student Cumulative Attendance Report.rpt
	Teacher Attendance Verification	[p. 538]	Teacher Attendance Verification Report.rpt
	Unsubmitted Attendance	[p. 540]	Unsubmitted Attendance.rpt
	Unsubmitted Attendance by Period	[p. 539]	Unsubmitted Attendance by Period.rpt
	Unsubmitted Attendance by Teacher	[p. 540]	Unsubmitted Attendance by Teacher.rpt
Grading	Cumulative GPA	[p. 541]	Cumulative GPA Report.rpt
	Failing Grades (Secondary)	[p. 541]	Failing Grades Report (Secondary).rpt
	Grades Verification	[p. 542]	Grades Verification.rpt
	Honor Roll	[p. 543]	Honor Roll Report.rpt
	Missing Grades (Elementary)	[p. 544]	Missing Grades Report (Elementary).rpt
	Missing Grades (Secondary)	[p. 545]	Missing Grades Report (Secondary).rpt
	Specific Grades	[p. 547]	Specific Grades Report (Secondary).rpt
	Student Academic Plan Progress Report	[p. 547]	Student Academic Plan Progress Report.rpt
	Student Transcript by Subject Area	[p. 548]	Student Transcript Report by Subject Area.rpt
	Student Transcript Report by Year	[p. 549]	Student Transcript Report by Year.rpt

Feature area	Reports included	Details	Report file name
Grid Print	Portrait Letter		Grid Print (Portrait-Letter).rpt
	Portrait Legal		Grid Print (Portrait-Legal).rpt
	Landscape Letter		Grid Print (Landscape-Letter).rpt
	Landscape Legal		Grid Print (Landscape-Legal).rpt
Health	Immunization Delinquency Letter	[p. 551]	Immunization Delinquency Letter.rpt
	Immunization Next Due	[p. 551]	Immunization Next Due Report.rpt
	Immunization Non-Compliance	[p. 552]	Immunization Non Compliance Report.rpt
	Student Health Condition	[p. 552]	Student Health Condition Report.rpt
	Student Immunization History	[p. 553]	Student Immunization History.rpt
Online course requests	Student Online Course Request Status	[p. 553]	Student Online Course Request Status.rpt
	Student Recommended Courses Verification	[p. 555]	Student Recommended Courses Verification.rpt
PowerTeacher	PowerTeacher Grades Entry Error		PowerTeacher Grades Entry Error Report.rpt
Scheduling	Class Add/Drop	[p. 557]	Class Add Drop.rpt
	Class Listing (Elementary)	[p. 558]	Class Listing (Elementary).rpt
	Class Roster	[p. 558]	Class Roster.rpt
	Class Roster Monthly	[p. 559]	Class Roster Monthly.rpt
	Class Roster Weekly	[p. 560]	Class Roster Weekly.rpt
	Class Schedule Log	[p. 561]	Class Schedule Log.rpt
	Contacts Roster	[p. 561]	Contacts Roster.rpt
	Course Catalog by Name	[p. 562]	Course Catalog by Name.rpt
	Course Catalog by Number	[p. 563]	Course Catalog by Number.rpt
	Course Request List	[p. 564]	Course Request List.rpt
	Course Request Rule Violation	[p. 565]	Course Request Rule Violation.rpt
	Course Request Tally	[p. 566]	Course Request Tally.rpt
	Course Request Tally by Grade	[p. 566]	Course Request Tally By Grade.rpt
	Course Request Tally by Grade	[p. 566]	Course Req Tally By Grade By Dept.rpt
	Course Request Tally by Term	[p. 567]	Course Request Tally By Term.rpt
	Course Request Tally by Term by Dept	[p. 568]	Course Req Tally By Term By Dept.rpt
	Course Request Verification	[p. 569]	Course Request Verfication.rpt
	Full Time Equivalent Summary	[p. 569]	Full Time Equivalent Summary.rpt

Feature area	Reports included	Details	Report file name
	Load Students Log	[p. 570]	Load Students Log.rpt
	Master Schedule	[p. 570]	Master Schedule.rpt
	Master Schedule by Meeting Pattern	[p. 571]	Master Schedule by Meeting Pattern.rpt
	Open Seats Summary	[p. 571]	Open Seats Summary.rpt
	Room Matrix by Day Period	[p. 572]	Room Matrix by Day Period.rpt
	Room Schedule	[p. 573]	Room Schedule.rpt
	Room Schedule Matrix	[p. 574]	Room Schedule Matrix.rpt
	Scheduling Configuration	[p. 574]	Scheduling Configuration.rpt
	Scheduling Performance Statistics	[p. 575]	Scheduling Performance Statistics.rpt
	Scheduling Pre-Check Builder	[p. 576]	Scheduling Pre-check Builder.rpt
	Scheduling Pre-Check Loader	[p. 577]	Scheduling Pre-check Loader.rpt
	Student Schedule	[p. 579]	Student Schedule.rpt
	Student Schedule (Elementary)	[p. 578]	Student Schedule (Elementary).rpt
	Student Schedule Matrix	[p. 580]	Student Schedule Matrix.rpt
	Student Schedule Matrix (Elementary)	[p. 579]	Student Schedule Matrix (Elementary).rpt
	Student Scheduling Load Summary	[p. 581]	Student Scheduling Load Summary.rpt
	Teacher Matrix by Day and Period	[p. 583]	Teacher Matrix by Day Period.rpt
	Teacher Schedule Matrix	[p. 582]	Teacher Schedule Matrix.rpt
	Teacher Schedule	[p. 582]	Teacher Schedule.rpt
	Unscheduled Rooms	[p. 584]	Unscheduled Rooms.rpt
	Unscheduled Student Analysis	[p. 584]	Unscheduled Student Analysis.rpt
	Unscheduled Students	[p. 585]	Unscheduled Students.rpt
	Unscheduled Teachers	[p. 586]	Unscheduled Teachers.rpt
Student Behavior	Discipline Profile	[p. 586]	Discipline Profile Report.rpt
Summary	ADA/ADM Summary	[p. 590]	ADA Summary.rpt
	Student Behavior Summary	[p. 594]	Student Behavior Summary.rpt

Feature area	Reports included	Details	Report file name
Test Management	Student Test History	[p. 591]	Student Test History Report.rpt
	Student Test Profile	[p. 592]	Student Test Profile.rpt
	Test Scores Below Minimum Requirements	[p. 592]	Test Scores Below Minimum Requirements.rpt
	Test Session Details	[p. 593]	Test Session Details Report.rpt
	Test Session Summary	[p. 593]	Test Session Summary Report.rpt

Permanent Record reports

For a system that has converted to Permanent Record (PR), three additional reports are available [*Table 22*, p.135] in the file "[version]PR-RptPckg.zip". **Important:** Do NOT upload these PR reports unless you are working in a PowerSchool SMS PR environment.

Table 22: Permanent Record Reports

Feature area	Reports included	Details	Report file name
Grading	Cumulative GPA		Cumulative GPA Report.rpt
	Student Transcript by Subject Area PR		Student Transcript by Subject Area PR.rpt
	Student Transcript by Year PR		Student Transcript by Year PR.rpt

Downloading the Report Package

You can download the latest version of the PowerSchool SMS Report Package [p. 131] (appropriate to the version of the PowerSchool SMS software on your system) from the support site for which you need a valid user name and password. The Report Package consists of one compressed file with the extension ".zip".

To download the Report Package:

1 Using a web browser, go to https://support.powerschool.com
   The login page appears.
2 Log in. The **Home** page appears.
3 Click the **Support** tab.
4 In the task bar under the tabs, click **Downloads**.
5 Click the PowerSchool SMS folder.
6 Click **Releases and Updates**.
7 Click the folder for the applicable Report package. The Report Package page appears.
   - For example, Downloads > Releases and Updates > SMS [version #] Report Package > SMS [version #] Report Package.
8 Under **Available Resources**, locate the Report Package and click the down arrow to the right.
9 A **File Download** or **Opening** dialog appears.

10 Click **Save**. **PowerSchool SMS** saves the file to the Download directory.
- Or, click **Save**, find a suitable location to save the file, and click **Save**.
- Ensure that the file name extension is ".zip".

Uploading the Report Package to PowerSchool SMS

Once you have the Report Package [p. 131] downloaded [p. 135] and saved in its original .zip format, you can use PowerSchool SMS to upload some or all of the reports to a system. A District or School Administrator can upload Report Package reports.

During the upload process, you have the opportunity to view the reports in the package and select which of the reports PowerSchool SMS should upload. If a report of the same name as a package report exists on the system, you have the option of instructing PowerSchool SMS to overwrite the existing report with the new one.

When the upload process is complete, all reports that are new on the system are automatically available to all of that system's users (provided they have appropriate permissions). For all upgraded reports (that is, reports in the package that have the same name as an existing report) PowerSchool SMSretains the report's options, permissions, and default filters.

Caution: The first time you upload the PowerSchool SMS Report Package to a system, you must upload the report named "Chancery SMS List of Reports" from the file "RptPckg.zip".

To upload the Report Package to a PowerSchool SMS system [SA, DA[1]]:

1 Extract the contents of the Report Package file to a folder to which you have access:
  a In Windows File Manager, double-click "RptPckg.zip" to extract its contents, which consist of several zip files, one for each feature area; for example, "Rpt-US-[version]-Attendance.zip" see *PowerSchool SMS Report Package* [p. 131].
  b Double-click the file "Rpt-US-[version]-All.zip" to extract its contents, which consist of one zip file for each report.
2 In the **Admin** menu, click **DistrictSetup. The District Setup page appears.**
3 Under **Reports**, click **Customize Reports**. The Customize Reports page appears.
  - Or on the School Setup page, under **Customization**, click **Customize Reports**.
4 On the Customize Reports page, in the **Actions** menu click **Upload Report Package**. The Report Package page appears.
5 Upload a group of reports (that is, zip file) as follows:
  a Click **Browse**. A Choose File dialog appears.

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[1]You can do this if your role is School Administrator or District Administrator.

b Locate and select the relevant zip file [p. 131] extracted in step 1 and click **Open**. The path to the file appears in **New report package (.zip)**.

c On the **Report Package** page, click **OK**. The Upload Confirmation page displays the reports in the package [*Figure 81*].

d In the **Actions** column, select an action for each report listed.

- "Overwrite" replaces an existing report of the same name with the report from the package.
- "None" does not upload this report. This is the default action when PowerSchool SMS detects an existing customized version of a report of the same name.

e Click **OK**. PowerSchool SMS uploads the report(s) as specified and displays the results on the Upload Results page.

- If you receive an error message while uploading a group of reports, this may mean your system cannot handle the size of the upload. Upload the desired reports one at a time.

6 To upload another group of reports, start again at step 2.

Figure 81: Upload Confirmation page

Action	Report	Version	Comment
Overwrite	Chancery SMS List of Reports	1	
Overwrite	Cumulative GPA Report	2	
Overwrite	Grades Verification	6	
Overwrite	Student Transcript Report by Subject Area	23	
Overwrite	Student Transcript Report by Year	23	

Total: 5

A **Action**: Specifies the action PowerSchool SMS will take when you start the upload.
B **Report**: The name of the report in the selected file.
C **Version**: The version number of the report template. When a report template is changed, its version number is increased.
D **Comment**: Additional information included by the developer of the report template.

School and district operation

This section describes aspects of the system that bear on the routine operation of a school, such as enrollment [p. 141] and attendance [p. 76], or the district as a whole, such as backing up the system. Typically, these tasks are the responsibility of a School or District Administrator [p. 12].

Registration

Registering a student in a PowerSchool SMS system enables all users of that system—school administrators, teachers, counselors, and so on—to work with that student and adjust his or her information as necessary. The registration process concludes with the enrollment of the student in a school (a student must be registered in order to be enrolled in a school [p. 141]).

Once a student is registered you can update that student's registration information through the student record. If necessary, you can delete a student's registration [p. 140].

To view a student's registration:
1 Find [p. 37] and view the student's record [p. 54].
2 In the control bar, click **Registration**.

Table 23: **Permissions pertaining to registration**

To	You need this permission	Set to	Details
Register a student	**Students > Registration Information** **Students > Add students**	Yes Yes	[p. 784] [p. 765]
Adjust a student's demographic information	**Students > Demographic Data**	Edit	[p. 773]
Delete a student's registration	**Students > Delete Students**	Yes	[p. 773]

Registering a new student

Registering a new student involves entering the student's personal information, assigning an initial grade level, and enrolling the student in a school.

Before registering a new student, we recommend that you search the system for that student to ensure that he or she is not already registered. If you find a similar student—a sibling, for example—this student's record can be used as a basis for the new student.

For this purpose, PowerSchool SMS uses a search that examines student records across the entire system. The search encompasses students that are registered as well as those that are enrolled (other student searches [p. 37] find only the records for students who are enrolled).

To search for a registered student [SA, DA[1]]:

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[1]You can do this if your role is School Administrator or District Administrator.

1   On the Home page [p. 15], in the **Actions** menu click
    Register/Enroll Student.... The Registration/Enrollment
    Search page appears [*Figure 82*].
    - Or, in the Search menu, select **Registration/Enrollment**.
2   Search for a student.
    - For convenience, PowerSchool SMS provides the administrator with a
      default set of five search criteria for which you need only enter
      values; these include: Last name, First name, Birth date, Student
      number, and SSN/SIN [*Figure 82*]. Of course, the administrator can
      alter these criteria.
    - Click **Detail** to build a search using a larger range and combination of
      fields, including custom fields [p. 42].
3   Click **Search**. PowerSchool SMS displays matching student
    records (if any) under **Search Results**.
4   Under **Search results**, examine the list of results for possible
    matches.
    - **View**: You can apply a pre-configured *grid view* to the list of search
      results [p. 24].
5   If you do not find the student in the system, continue with the
    procedure for *Enrolling a student for the first time* [p. 142].
    - If you find the student, continue with the procedure for *Enrolling a
      student in another school* [p. 146].

Figure 82: Registration/Enrollment Search page

Deleting a student from the district

A District Administrator can delete all district-specific information about a student. This effectively removes the student from the system. A District Administrator can delete a student from the system only after a School Administrator has deleted the student's record from her school [p. 150].

To delete a student from the district:

1 On a Student Search result page [p. 48], select one or more students.

2 In the **Actions** menu, select **Delete Students from District...**.
The Delete Students page appears.
- On the page, PowerSchool SMS may indicate that one or more students are not eligible for deletion. The administrator can proceed only when all students listed are eligible for deletion.
- To view a brief summary of a student's information, click the Summary icon [*Figure 83*, p.141].

3 Click **OK**.

Figure 83: Delete Students popup page

A Summary icon: Enables the administrator to view a summary
of this student's information, including current enrollments.

Enrollment

The enrollment procedure depends on the role [p. 12] of the user doing the enrolling and the status of the student being enrolled.

The District Administrator can:

- Enroll a student who is new to the district as part of the registration process. Refer to *Enrolling a student for the first time* [p.142].
- Enroll a student who is already enrolled in the district in any school. Refer to *Enrolling a student in another school* [p.146]

A School Administrator can:

- Enroll a student who is new to the district as part of the registration process. Refer to *Enrolling a student for the first time* [p.142].
- Enroll a student who is already enrolled in the district in another school [concurrent or withdraw first] or, provided the School Administrator has the necessary permissions [p. 766]), enroll that student in a school other than the administrator's own. Refer to *Enrolling a student in another school* [p.146]
- Enroll a student who is already registered in the district in his school. Refer to *Enrolling a student for the first time* [p.142].

The district or school administrator can enroll a student when working in either the Active or Planning Calendar [p. 171]. The date of enrollment determines whether the student is active in the current school year or will be active in the next school year. In some circumstances, the enrollment process results in a *pending enrollment* [p. 149].

The district or school administrator can also:

- View a registered student's enrollment history [p. 148].
- Withdraw a student from a school [p. 150].
- Delete a student's records from a school [p. 150].

- Transfer a student mid-year by withdrawing [p. 150] that student's enrollment at one school and then enrolling the student at another (where the student is attending only one school).

In preparation for year-end, refer to *Projecting enrollment for the next year* [p. 151]

Table 24: **Permissions pertaining to enrollment**

To	You need this permission	Set to	Details
Register a student	**Students > Add Students**	Yes	[p. 765]
Work with a student's registration information	**Students > Registration Information**	Edit	[p. 784]
Enroll a student in a school	**Students > Manage Student Enrollments**	Edit or Delete	[p. 780]
Withdraw a student from a school	**Students > Withdraw Student**	Edit or Delete	[p. 799]
Add and edit student contacts	**Students > Contact Information**	Edit or Delete	[p. 771]
Adjust a student's demographic information	**Students > Demographic Data**	Edit	[p. 773]
Delete a student enrollment record	**Students > Delete students from district**	Edit or Delete	[p. 773]
Add enrollments for students at other schools	**Students > Add Student to Other Schools**	Yes	[p. 766]
Edit enrollments for students at other schools	**Students > Edit Enrollment for Other Schools**	Yes	[p. 775]

Enrolling a student for the first time

A District Administrator or School Administrator can use this procedure to enroll a student who is new to the district as part of the registration process. A School Administrator can also use this procedure to enroll a student who is already registered in the district in the administrator's school.

To enroll a student for the first time [SA, DA][1]:

1 Search for the student to find out if he or she is already registered: On the Home page [p. 15], in the **Actions** menu click **Register/Enroll Student...**. The Registration/Enrollment Search page appears [*Figure 82*].
   - Or, in the Search menu, select **Registration/Enrollment**.
2 Under **Search results**, examine the list of results for possible matches.
   - If the search results contain no records, create a new student registration using the search criteria by clicking **New**. The Register

[1]You can do this if your role is School Administrator or District Administrator.

Student page appears. PowerSchool SMS inserts your search criteria into the new record, such as Last Name and Gender.

- If one of the student's listed is the one you intended to register, under **Student Name** click the student's name. PowerSchool SMS opens the Register Student page.
- If the student's information is similar to a student in the search results (a sibling, for example), select that student and click **Copy**. PowerSchool SMS opens a new student record with some of the information (including Last Name, Physical Address, and Student Contacts) already entered.
- **View**: You can apply a pre-configured *grid view* to the list of search results [p. 24].

3 On the Register Student page [*Figure 84*], enter or adjust **Student Information**. This information includes:

- **Student number**: PowerSchool SMS generates this number. How it does so depends on system preferences [p. 257]
- **Last name**, **First name**, **Birth date**: When you have entered information for Last name, First name, and Birth date, and PowerSchool SMS detects a possible match between the information entered and one or more students, it displays a list of possible matches [*Figure 84*] from which you can select, if desired.
- **Gender**: ....
- **Generation**: The student's name suffix, such as "Jr." or "III".
- **SSN/SIN**: Appearance depends on the setting for the *Access to SSN permission* [p. 765]
- **Federal race category**: Move one or more relevant categories to the **Selected** column.
- For information on other fields, refer to *Student records* [p. 54].
- **Note**: An asterisk (*) identifies information that PowerSchool SMS requires. Required fields are specified by the District Administrator [p. 267].

4 On the Register Student page [*Figure 84*], enter **Registration Information**, which includes:

- **Grade level**: The student's grade level at the time of registration or the grade in which the student will be enrolled. **Note**: When you save the student registration record, PowerSchool SMS uses this registration grade level to set the student's "District grade level". **Note**: Once the student is enrolled in the home school, only a School Administrator at the student's home school can change the student's district grade level (if appropriate to do so) [see *Student Demographics: School-specific student information*, p. 59] without affecting the registration grade level.
- **Date**: The effective date of the registration.
- **Status**: Set to "Registered". Other choices include "Graduated" and "Not registered".
- **Location**: The school (if being registered by a School Administrator) or district name in which the student is being registered. PowerSchool SMS initially enters the student's zoned school, which depends on the student's physical address.

5 Click **Enter Address & Contact Data**. The Contact Information page appears [*Figure 85*].

6 Enter or confirm the **Student Physical Address** and **Student Mailing Address** [*Figure 85*].
- If the system employs address validation [p. 258], click **Verify** to validate a student's address prior to enrolling that student.

7 Enter, change, or confirm **Student Contacts** and **Siblings** [*Figure 85*].
- For details, refer to *Student record: Contacts* [p.64].

8 Click **Enroll** [*Figure 85*]. PowerSchool SMS registers the student and displays the Enroll Student page.

9 Enter **Enrollment** information, which includes:
- **Start date**: PowerSchool SMS automatically enters a date. This is the date on which the enrollment status code begins. **Note**: The end date of one enrollment cannot be later than the start date of another enrollment at the same school; however a student can have concurrent enrollment at different schools.
- **Entry status**: The student's circumstances that led to this enrollment. Choose from a list, such as "From local public school" and "Returned". Entry state codes are set up by a District Administrator [*Student enrollment setup* p.267].
- **Grade level**: The grade level for this student in the district. A student's grade level is a district-wide property [p. 199].
- **School of enrollment:** The school the student attends. In some circumstances, this school can differ from the Home School; for example, a student might attend her home school in the morning for regular classroom instruction and her school of enrollment in the afternoon for vocational training. **Note:** If you choose a school that has controlled enrollment, PowerSchool SMS presents fields that enable you to specify the program [p. 88].
- **Set as home school**: Specifies this school as the student's home school.
- **Distance from school**: Distance in miles from the Student Physical Address to the School of Enrollment's address.

10 Confirm or adjust **Projected Enrollment for Planning Calendar** information, which includes:
- **Zoned school**: [p. 73]PowerSchool SMS displays this school after you have set the Date and Grade level and clicked **Update** see *Student Demographics: Overview* [p. 56]**.**
- **Requested school**: [p. 73]
- **Projected grade level**: The grade level to which the student is projected to graduate at year end. Set by PowerSchool SMS according to the student's Grade Level and system settings [see *Projected grade levels* p.436].

11 Enter information in **Fields Required or Recommended for Enrollment**.

12 Click **OK**. The student is enrolled. The Registration/Enrollment Search page appears.
- Click **Apply** to have PowerSchool SMS validate the information recorded without enrolling the student.

- In certain circumstances, PowerSchool SMS sets the enrollment as Pending [p. 149].

Figure 84: Register student page

A **Possible matches**: Indicates the number of students that are possible matches with the student information entered in the fields Last name, First name, and Birth date. Click the link to display and select from the list of possible matches.

Figure 85: Contact Information page

A **Student Physical Address**: PowerSchool SMS enters the address from the matching student or from your search. The administrator can change it.

B **Verify & Validate**: Appears only on a system that employs address validation [p. 258]. Subjects the physical address to address validation.

C **Student Mailing Address**: PowerSchool SMS enters the physical address. The administrator can change it.

D **Student Contacts**: Enables the administrator to add contacts associated with this student by entering a new contact, linking to an existing contact [*Figure 44*], or linking to a Sibling [p. 68].

E **Enroll**: Click to complete the enrollment.

F **Select Address**: Appears only on a system that employs address validation [p. 258]. Click to find the address in the district and match it to a school zone. This match determines the student's home school.

Enrolling a student in another school

A District Administrator can use this procedure to enroll a student who is already registered in the district in any school. A School Administrator can use this procedure enroll a student who is already registered in the district in his school only or, with the necessary permissions [p. 766], in a school other than the administrator's own.

Note: Typically, a student can be enrolled in more than one school. Depending on how the system is set up see *Student enrollment setup* [p.

267], before enrolling a student in a school, you may have to first withdraw [p. 150] the student from one or more schools in which he or she is enrolled.

Note: If a student has restrictions due to behavior [p. 89], and the administrator attempts to enroll that student in a new school, PowerSchool SMS displays a warning (depends on *Student enrollment setup* [p.267]).

To enroll a student in a school[SA, DA][1]:

1 Search for and find the student [p. 37] and view the student's record [p. 54].
2 On a page of the student's record [p. 54], in the control bar click **Enrollments**. The Enrollments page appears [*Figure 86*].
3 Click the add enrollment icon [*Figure 86*].
4 Enter **Enrollment** information, which includes:
- **Start date**: PowerSchool SMS automatically enters a date. This is the date on which the enrollment status code begins. **Note**: The end date of one enrollment cannot be later than the start date of another enrollment at the same school; however a student can have concurrent enrollment at different schools.
- **Entry status**: The student's circumstances that led to this enrollment. Choose from a list, such as "From local public school" and "Returned". Entry state codes are set up by a District Administrator [*Student enrollment setup* p.267].
- **Grade level**: The grade level for this student in the district. A student's grade level is a district-wide property [p. 199].
- **School of enrollment:** The school the student attends. In some circumstances, this school can differ from the Home School; for example, a student might attend her home school in the morning for regular classroom instruction and her school of enrollment in the afternoon for vocational training. **Note:** If you choose a school that has controlled enrollment, PowerSchool SMS presents fields that enable you to specify the program [p. 88].
- **Set as home school**: Specifies this school as the student's home school.
- **Distance from school**: Distance in miles from the Student Physical Address to the School of Enrollment's address.
5 View the **Status Code History** information [*Figure 87*], which displays a record of changes to the student's status code. This information is not available to all users.
6 Confirm or adjust **Projected Enrollment for Planning Calendar** information, which includes:
- **Zoned school**: [p. 73]PowerSchool SMS displays this school after you have set the Date and Grade level and clicked **Update** see *Student Demographics: Overview* [p. 56]**.**
- **Requested school**: [p. 73]
- **Projected grade level**: The grade level to which the student is projected to graduate at year end. Set by PowerSchool SMS according

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[1]You can do this if your role is School Administrator or District Administrator.

to the student's Grade Level and system settings [see *Projected grade levels* p.436].

7   Click **OK**. The student is enrolled. The Enrollments page appears.

- Click **Apply** to have PowerSchool SMS validate the information recorded without enrolling the student.
- In certain circumstances, PowerSchool SMS sets the enrollment as Pending [p. 149].

Figure 86: **Enrollments page, Enrollment History**

A   Add an enrollment: Click to enroll this student [p. 146].

B   **Display enrollments for**: To limit the list of enrollments to a particular school, select that school from the list.

C   Information: Click to view additional information on this enrollment [p. 72].

D   Delete icon: Click to delete the enrollment [p. 150].

E   Edit icon: Click to view or adjust an enrollment.

Viewing a registered student's enrollments

Typically, each registered student is enrolled in at least one school, and that school is the student's home school. A student registered in the district for several years might develop a history of enrollments.

Note: A student can have multiple *active enrollments*, that is, enrollment records with an entry-type status code that does not have a corresponding withdrawal record and where the date of the enrollment is on or before the Active Calendar's end date.

You can view a record of a student's enrollments.

To view a student's enrollments [SA, DA[1]]:

1   On a page of the student's record [p. 54], in the control bar click **Enrollments**. The Enrollments page appears.

2   View the student's enrollments [*Figure 86*]. For details on the information displayed, see *Enrolling a student in another school* [p. 146].

3   To view or adjust an enrollment, move the cursor over the **Comment** column for that enrollment and click the edit icon.

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[1]You can do this if your role is School Administrator or District Administrator.

- To enroll this student, click the add enrollment icon [*Figure 86*].

Figure 87: Status Code History

A Add a status code icon: Click to record a change in the student's status code.
B Information: Click to view additional information on this status code change.
C Delete icon: Click to delete the status code change.
D Edit icon: Click to view or adjust the status code.

Pending enrollments

When an administrator enrolls a student, PowerSchool SMS sets that student's enrollment to Pending where:

- The administrator has enrolled the student in a school that is different from the student's zoned school. District approval is required to complete the enrollment. When an administrator grants the necessary approval, PowerSchool SMS automatically removes the Pending status, completes the enrollment (provided all other enrollment conditions are also met), and displays it on student's Enrollment record [p. 72].
- The administrator has enrolled the student in a school that employs Program Management [p. 88] to control enrollment and the student is not an applicant, or is an applicant but is no eligible or a seat is not offered.

Note: While an enrollment for a student is pending, if the District Administrator adds an enrollment for this student, PowerSchool SMS displays a message that an enrollment is pending and gives the administrator the option of viewing that enrollment or adding a new one. If the administrator enrolls the student in a school at which that student has an enrollment pending, PowerSchool SMS removes that pending enrollment. If the administrator enrolls the student in a school at which that student has an enrollment pending, and that new enrollment is set to pending, PowerSchool SMS replaces the first pending enrollment with the new one.

The administrator can view all students who have an enrollment pending--at one school or at any school in the district--by searching. The administrator can view the pending enrollment or add a new enrollment.

To work with pending enrollments [SA, DA[1]]:

[1]You can do this if your role is School Administrator or District Administrator.

1. On the Home page [p. 54], in **Actions** menu, select **Register/Enroll Student....**
2. Under **Registration/Enrollment Search**, under Detail, set the following search:
   - Field: "Pending Enrollment"
   - Operator: "Exists"
3. Click **Search**. PowerSchool SMS displays all students who have an enrollment pending.
   - You can refine the results using the search criteria.
4. Click a student's name to view that student's pending enrollment(s). PowerSchool SMS displays a message that gives the administrator the option of viewing that enrollment or adding a new one.

Withdrawing a student

You can withdraw a student from a school in which she is enrolled.

To withdraw a student from a school [SA, DA[1]]:

1. On a page of the student's record [p. 54], in the control bar click **Enrollment**. The Enrollments page appears.
2. Under **Enrollment History**, move the cursor over the **Comment** column for that enrollment [*Figure 86*].
3. Click the edit icon [*Figure 86*]. The Enrollment page appears.
4. Click **Withdrawal**.
   - **Note**: Appears only if the setting for the *Withdraw Student permission* [p. 799] is "Yes".
5. Enter details, which include:
   - **End date**: The effective conclusion of the enrollment.
   - **Most recent status**: The student's circumstances that concluded this enrollment, such as "Left".
6. Click **OK**.

Deleting a student's records from a school

You can delete all school-specific information about a student, including attendance, scheduling, and grading records. This does not delete the student from the district—you can enroll the student in other schools. To delete a student from the district, refer to *Deleting a student from the district* [p.140]

To delete a student from a school:

1. On a page of the student's record [p. 54], in the control bar click **Enrollments**. The Enrollments page appears.
2. Under **Enrollment History**, move the cursor over the **Comment** column for that enrollment [*Figure 86*].
3. Click the delete icon [*Figure 86*].

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[1]You can do this if your role is School Administrator or District Administrator.

Projecting enrollment for the next year

When the district's school year comes to an end, typically the District Administrator runs *Year-End Processing* [p. 450] to convert the Planning Calendar [p. 172] to the new Active Calendar. During Year-End Processing, PowerSchool SMS adjusts each student's enrollment and grade level according to the system's *year-end transfer method* [p. 152] and various student-related criteria such as the student's school's *graduation grade level* [p. 155]. For a particular student, a District or School Administrator can override the year-end transfer method and directly specify the student's enrollment [p. 157].

Enrollment changes during Next-Year Preparation

When a School Administrator creates a Planning Calendar, PowerSchool SMS changes each student's enrollment according to various factors [p. 151]. The resulting change might involve PowerSchool SMS:

- Promoting the student to another grade level in the student's School.
- Enrolling the student in a grade level at a different school.
- Withdrawing the student from enrollment in the District.
- Graduating the student from the District.
- Retaining the student in the School at the current grade level.

In general, PowerSchool SMS can determine a student's enrollment in the Planning Calendar where:

- The student's current school is the school in which the student is enrolled in the Active Calendar.
- The student's enrollment is active at the completion of the Active Calendar.
- The student's enrollment status is promoted or pending.
- The student is assigned to a **Home School** see *Student record: Enrollments* [p. 72].
- The student is assigned a **Home School (Active)** see *Student record: Demographics* [p. 55].
- The student has a projected school [p. 157].

PowerSchool SMS advances a student's grade level in his or her school (and does not transfer the student to another school) where:

- The student's **Zoned School** [p. 157] is the same as the student's current school.
- The student's **Requested School** [p. 157] is the same as the student's current school.

To enroll a student in a grade level at a different school, PowerSchool SMS takes into account:

- The year-end transfer method used by the district [p. 152].
- If the student is in a graduating grade.
- The district's setting for **Set graduated student grade level to** (on the General Preferences page).

- The student's **Requested School** [p. 157]
- Program management settings (if the system employs it), including:

  Controlled enrollment at a school: A School Administrator must explicitly enroll a student in a controlled enrollment program after the student has applied and been accepted. **Note**: A student can only be enrolled in a program if that student is enrolled at that program's school, that is, PowerSchool SMS does not automatically create participant records and program applications for a student not enrolled in the school.

  The setting of **Planning Calendar Requested School Controlled by Program Management** see *Projecting enrollment for the next year* [p. 151]

  A program session's setting for the **Planning Calendar Option**.

  If the student is enrolled in several controlled-enrollment programs at a school.

Year-end transfer method

During Year-End Processing [p. 450], for each district student who has completed a grade level, PowerSchool SMS determines if that student is to be transferred to another school by applying the year-end transfer method. The District Administrator sets the method to use. Options are:

- *Projected School Map* [p. 152]: This is the default method.
- *Geocode Map* [p. 153]: This is available only on a system that employs Address Validation.

To set the year-end transfer method [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Preferences**, click **General...**. The General Preferences popup page appears.
3 Under **Year-End Transfer**, set the **Year End Transfer Method**. Options include:
   - "Projected School Map" [p. 152]
   - "Geocode Map" [p. 153]
4 Click **Save**.

Projected School Map

A *Projected School Map* pairs each feeder school in the district to a *projected school*, that is, another school in the district to which PowerSchool SMS transfers a student during Year-End Processing [p. 450] when that student has completed the school's graduation grade level [p. 155]. A School Administrator can specify the projected school for his or her school, a District Administrator for any or all schools in the district. **Note**: You must be in the Active Calendar [p. 172] to set the projected school mappings. **Caution**: If a student's school is not mapped to a projected school, PowerSchool SMS withdraws the student from his or her school but does not enroll the student in another.

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[1]You can do this if your role is District Administrator.

To set a single school's projected school [SA, DA[1]]:

1 In the **School** menu, click **School Info**. The School Info page appears.
2 Click the school's name. The School Info Detail page appears.
3 Click <u>Edit</u>. The School popup page appears.
4 In the **Projected School** drop down, select a school.
   - The **Projected School** field appears only if the district's Year End Transfer Method is set to "Projected School Map" [p. 152]. At a school that does not feed students into another school, the Projected School is "N/A".
5 Click **Save**.

To set the projected school for multiple schools in the district [DA[2]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Year-End Processing**, click <u>**Year-End Processing**</u>. The Year-End Processing page appears.
3 Under **Step 1**, click <u>**Projected Schools…**</u>. The Projected Schools popup window appears [*Figure 91*].
4 For each school, select the **Graduation Grade** and a **Projected School**.
5 Click **Save**.

Geocode Map

On a system that employs Address Validation, a District Administrator can set the year-end transfer method so that PowerSchool SMS refers to the district's *Geocode Map* [p. 153]. During Year-End Processing [p. 450], PowerSchool SMS uses the Geocode Map to transfer a student (where that student has completed the school's graduation grade level [p. 155]) to the appropriate school by examining the location of that student's residence.

The Geocode Map, created by the District Administrator, pairs each of the district's geocodes with an *entry grade level* [p. 156] at a particular school [*Figure 88*]. A school's entry grade can have more than one geocode assigned to it (the school can serve a broad geographical area). A geocode can be assigned to only one school's entry grade. **Note**: The Planning Calendar [p. 172] must be active for an administrator to change the Geocode Map.

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[1]You can do this if your role is School Administrator or District Administrator.
[2]You can do this if your role is District Administrator.

Figure 88: Geocode mapping example
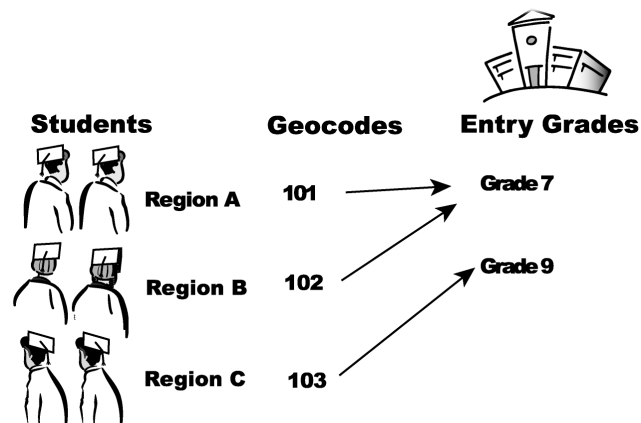
Note: For Year-End Processing [p. 450] to run successfully, the Planning Calendar must have a Geocode Map. During next-year preparation (NYP) [p. 435], when the District Administrator creates a Planning Calendar PowerSchool SMS copies the Geocode Map from the Active Calendar to the new Planning Calendar; the District Administrator need only adjust the Geocode Map to prepare for the next year. Any changes that the District Administrator makes to the map or geocodes take effect in the school year being planned. **Note**: A District Administrator can use scripts to verify the validity of the geocode map. For information, refer to the *Checking Geocode Setup Technical Bulletin*. **Caution**: If a student does not end up with a valid Geocode in the Planning Calendar, PowerSchool SMS withdraws or graduates the student from his or her school but does not enroll the student in another.

Caution: A change to the geocodes associated with a school can cause PowerSchool SMS during Year-End Processing [p. 450] to change a student's Zoned School [p. 55] for the next year. If this occurs, PowerSchool SMS takes time to implement any change to the Zoned School; it unenrolls the student from the former school and, during the nightly process, enrolls the student in the new school. You can view these changes in the Planning Calendar the next day (PowerSchool SMS displays "N/A" for the Zoned School until transfer mapping is complete).

To assign geocodes to a school's entry grade(s) [DA[1]]:

1   In the Planning Calendar, in the **Admin** menu, click **District Setup**. The District Setup page appears.
2   Under **District**, click **Next Year Preparation**. The Next Year Preparation page appears.
3   Under **Step 4**, click **Geocode Map**. The Geocode Map page appears with a list of schools for which an entry grade is assigned [*Figure 89*].
4   In the **School Name** column, click the school's name. The Edit Geocode School Map page appears [*Figure 90*].
5   For **School**, select an entry grade from the list.

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[1]You can do this if your role is District Administrator.

- A District or School Administrator designates a school's entry grades [p. 157].

6 Assign one or more geocodes by selection them, and then using the arrow key to move them from the **Available Geocodes** column to the **Selected Geocodes** column
   - You can also double-click a geocode to move it from one column to another.

7 Click **OK**.
   - Caution: PowerSchool SMS takes time to process these new assignments. We recommend waiting at least overnight before conducting YEP.

Figure 89: Geocode Map page

A **Entry Grade**: The grade into which students from other schools transfer at year end. A school can have more than one entry grade.

B **Geocodes**: The geocodes assigned [*Figure 90*].

Figure 90: Edit Geocode School Map page

A **School**: The school and entry grade to which the Selected Geocodes apply. You can select another grade from the list.

B **Available Geocodes**: These geocodes are not yet assigned to this entry grade at any other school.

C **Selected Geocodes**: These geocodes are assigned to this entry grade and this school.

School graduation grade level

To determine if it should transfer a student to another school during Year-End Processing [p. 450], PowerSchool SMS refers to the student's school's graduation grade level. This is the grade level at which a student completes

his or her education at the school. A School Administrator can specify the graduation grade level for a school, a District Administrator for any or all schools in the district. **Note**: To set the graduation grade level for district schools, the district's year-end transfer method must be set to Projected School Map [p. 151].

To set a single school's graduation grade level [SA, DA[1]]:

1   In the **School** menu, click **School Info**. The School Info Detail page appears.
2   On the **Basics** panel, click **Edit**. The Schools popup page appears [*Figure 92*].
3   Under **Basics**, set **Graduation Grade**.
4   Click **Save**.

To set the graduation grade level for schools in the district: [DA[2]]

1   In the **Admin** menu, click **District Setup**. The District Setup page appears.
2   Under **Year-End Processing**, click **Year-End Processing**. The Year-End Processing page appears.
3   Under **Step 1**, click **Projected Schools…**. The Projected Schools popup window appears [*Figure 91*].
4   For each school, set the **Graduation Grade**.
5   Click **Save**.

Figure 91: **Projected Schools popup window**

School entry grade level

An entry grade level at a school is a grade level into which students from other schools can be automatically transferred. Most schools have only one entry grade level set, typically the lowest grade level. However, for the purposes of the geocode mapping year-end transfer method [p. 153], a school may have more than one entry grade; for example, the elementary school for Geocode A may offer grade levels 1 to 5, while the elementary school for Geocode B offers grade levels 1 to 6. The middle school these students go to would have two entry grade levels: Grade 6 for students in Geocode A and Grade 7 for students in Geocode B. A District or School Administrator designates entry grade levels at a school. **Note**: To designate

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[1]You can do this if your role is School Administrator or District Administrator.
[2]You can do this if your role is Administrator.

a school's grade as an entry grade, the district's year-end transfer method must be set to Geocode Map [p. 153].

To designate a school's grade as an entry grade: [SA, DA[1]]

1 In the **School** menu, click **School Info**. The School Info page appears.
2 Click the school's name. The School Info Detail page appears.
3 On the **Basics** panel, click <u>Edit</u>. The Schools popup page appears [*Figure 92*].
4 Under **School Entry Grades**, designate one or more Grades as an entry grade level by transferring them to the **Assigned Items** column from the **Available Items** column.
   - Double-click a grade to transfer it between columns.
   - **School Entry Grades** is available only if the year-end transfer method is set to Geocode Map [p. 153].
5 Click **Save**.

Figure 92: School Entry Grades
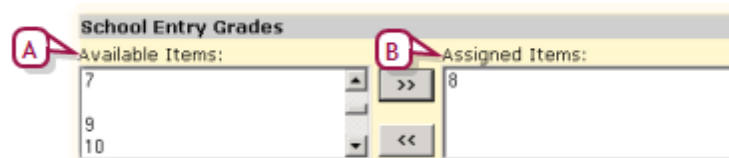
A **Available items**: Grade levels in this school.
B **Assigned items**: Grade levels into which PowerSchool SMS transfers students from other schools during Year-End Processing.

Specifying a student's school of enrollment for the next year

During Year-End Processing [p. 450], PowerSchool SMS assesses each district student for potential transfer to another school by referring to the District's transfer mapping. Typically, a student who has graduated from a school is subject to transfer to another school or graduation from the district.

A District or School Administrator can override this mapping for a particular student by requesting a particular school. For example, a student interested in a specialized vocational program would want to go to the only district school to offer such a program. **Note**: Since either a District or School Administrator can override the transfer mapping, we recommend that the district impose a policy on such overrides.

To project a student's enrollment [SA, DA[2]]:

1 On a page of the student's record [p. 54], in the control bar click **Enrollments**. The Enrollments appears.
2 In the **Status Code** column, click an enrollment's status code. The Edit Status Code page appears.

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[1]You can do this if your role is School Administrator or District Administrator.
[2]You can do this if your role is School Administrator or District Administrator.

3 Under **Projected Enrollment for Planning Calendar**, set options, which include:

- **Zoned school (projected)**: The school the student is projected to attend in the next school year for this school of enrollment. PowerSchool SMS sets the school based on the year-end transfer method [p. 152].
- **Requested school**: The desired school of enrollment (home school) for the student for the next school year. Selection options include:
  - "Use Zoned School": This is the default choice. Directs PowerSchool SMS to—during Year-End Processing [p. 450]—enroll the student in the school specified by the district's transfer mapping [p. 152] (Zoned School displays this school [p. 55]). **Note**: PowerSchool SMS applies this choice if the request for a specific school is rejected or fails for any reason. PowerSchool SMS also applies this choice of if the request is pending. When the request is approved, then during NYP processing PowerSchool SMS changes the student's enrollment accordingly.
  - [School name]: Specifies a District school. You can choose the school if the student is currently in a graduating grade and program management does not control the requested school.
  - "None": Withdraws the student from this school and prevents PowerSchool SMS from enrolling the student in another school next year. **Note**: Use "None" for a student who will no longer attend the school of enrollment (for example, he or she was attending an Advanced Math program at this school and does not plan to continue). During the Next-Year Preparation process, the student will be withdrawn from the school and a new enrollment record will not be created.
- If **Exception reason** is displayed, enter a reason. This is necessary if the system employs Address Validation and approval is required for enrollment exceptions. PowerSchool SMS enrolls the student in the Requested School only if approval is granted; otherwise PowerSchool SMS enrolls the student in the Zoned School. **Note**: A School Administrator can set PowerSchool SMS to automatically copy approved address exceptions for returning students from the Active Calendar to the Planning Calendar.
- **Note**: On a system that allows a student to be enrolled in more than one school, the administrator can specify the school to which the student should transfer for each school of enrollment: Under **Planning District Calendar**, click <u>Enrollment Status</u>. An Enrollment summary for all the student's schools appears. Under **Status Code**, click the status for a school and make an appropriate selection for **Requested School**.
- **Projected Grade**: PowerSchool SMS sets this grade based on the current Grade at the school of enrollment [p. 436]. Note: Where a student is projected to attend a new school in which she was previously enrolled, the projected grade level is NOT affected by the student's previous grade level at that school.

4 Click **OK**.

- PowerSchool SMStakes time to implement any change to the Zoned School [p. 55]. It unenrolls the student from the former school and, during the nightly process, enrolls the student in the new school. You can view these changes in the Planning Calendar the next day.
- Caution: Where a student's school of enrollment changes and the student is withdrawn from a school, PowerSchool SMS deletes any schedules created for that student at that school. You cannot recover these deleted schedules.

Note: You may be prevented from projecting a student's enrollment at a school that employs controlled enrollment in the following circumstances:

- The student is not currently enrolled at that school (the student must apply to a program at the controlled-enrollment school, be offered a position in the program, and enroll in the school).
- The program associated with the enrollment will not continue in the next active year (that is, it has an end date within the current active year).
- A Planning Calendar is created, but program sessions for the program associated with the enrollment are not available in the Planning Calendar for the controlled enrollment program.

Calculating daily attendance codes

For each day, PowerSchool SMS calculates each student's *daily attendance code* for every school in the district. PowerSchool SMS calculates this code based on rules set up at each school [*Setting up the daily attendance code calculation* p.189]. The resulting figures are used in reports for such purposes as school funding, communications to parents, and state reporting [*Report results* p.123].

Since calculating daily attendance codes is a task that typically makes heavy demands of system processing power, PowerSchool SMS makes its calculations for the district at a scheduled time each day. Typically this is an off-peak time outside school hours. PowerSchool SMS calculates an attendance code for each student for each day only once and stores the result.

Recalculating daily attendance codes

As a School Administrator, you have the option of having PowerSchool SMS recalculate school attendance codes for specific purposes, such as:

- If daily attendance code calculation rules are changed at a school [p. 189], we recommend that you recalculate daily attendance codes for the affected period.
- If attendance records are cleared [p. 161], we recommend that you recalculate daily attendance codes for the affected period.
- If attendance records for a student have been changed, you can make PowerSchool SMS to recalculate that student's daily attendance codes [p. 161].

You can have PowerSchool SMS recalculate immediately, at a future time, or at regular intervals.

To recalculate daily attendance codes:[SA][1]

1   In the **Admin** menu, click **Attendance**. The Attendance page appears.

2   Click **Schedule Attendance Calculations**. The Schedule Attendance Calculations page appears with a list of scheduled and completed calculations.

3   From the **Actions** menu, click **Add Scheduled Calculation**. The Job Schedule page appears.

4   In the **General** panel, enter or change information, which includes:
   - **Job name**: Each job requires a unique name.
   - **Calculation**:
      - "Daily attendance minutes" calculates daily attendance minutes, if your school tracks these [*Setting up minutes-based attendance (optional)* p.184]. : The values returned by this calculation are stored in two database fields: InSchoolDailyAttendanceMinutes and AfterSchoolDailyAttendanceMinutes. These fields are only available through the PowerSchool SMS data access layer for custom report system interface.
      - "Initialize behavior for day" sets attendance codes based on the action steps defined for student behavior [p. 198]. (Typically, this calculation is made each day for all schools in the district.) **Note**: Use this calculation for dates on which you have cleared attendance records [p. 161].
      - "Daily attendance calculation" sets PowerSchool SMS to make the standard code calculation.
   - **Period**: Sets the range of days for which to recalculate daily attendance codes. Options include:
      - **Current Date**: Today's date.
      - **Year-to-date**: All the days of the calendar year up to today.
      - **Report Card Period**: Select a period from the list.
      - **Date Range**: Enter Start and End dates.

5   In the **Students** panel, set the students for whom you want to calculate daily attendance. Options include:
   - **All students in the school**: This is the default selection.
   - **Selected Students**: Find students by setting search criteria and clicking **Search** or by clicking **Display All Records**. This generates a list of **Available Students** from which you can select by moving one or more to **Selected Students**.

6   In the **Scheduling Options** panel, enter or change Information, which includes:
   - **Run now**: Sets the calculation to run once at the time you click **OK**. This is the default choice.

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[1]You can do this if your role is School Administrator.

- **One time**: Set the future date and time at which you want PowerSchool SMS to run the calculation. **Note:** If you inadvertently choose a past date and time, the report runs as soon as you click **OK**.
- **Recurring**: Set the interval at which you want PowerSchool SMS to run the calculation and the future date and time at which you want the interval to commence. The interval can be by hour, day, week, or month. **Note:** If you inadvertently choose a past date and time, the report runs the first time as soon as you click **OK**.

7 Click **OK**.

Recalculating daily attendance codes for a student

You have the option of making PowerSchool SMS recalculate daily attendance codes for an individual student for one or more days in the past as well as the current day. You may wish to do this if the attendance records for a student have been changed. **Note**: Changing attendance codes assigned to students for days that have passed could affect daily code calculations.

To recalculate daily attendance codes for a student: [SA[1]]

1 Locate and view a student record [p. 37]. The Edit Student Demographics page appears.

2 In the control bar, click **Attendance**. The Student Attendance page appears.

3 Select a **Date Range**.
- Selecting "Date Range" enables you to set a range based on **From** and **To** dates.
- When you proceed to the next step, PowerSchool SMS gives you the option of including Today.

4 From the **Actions** menu, click **Calculate Daily Codes**.

Clearing attendance records

As a School Administrator, you may encounter circumstances in which you need to clear attendance records. One such circumstance is when you need to make changes to a student record such as attendance records for future days. Another circumstance is when you have to clear attendance for an exception day [p. 178], such as a snow day.

You can clear attendance records for any or all students in any or all classes. You can clear attendance records for any date or date range as long as it is in the current Active Calendar year. In a school that takes attendance twice daily [p. 181] you can clear attendance for an entire day, but you cannot clear attendance for only the morning or afternoon.

Note: If you clear attendance for a past date, re-initialize that day before allowing PowerSchool SMS to recalculate daily attendance codes [p. 159]. When you re-initialize the day, PowerSchool SMS reassigns the default daily attendance code; otherwise PowerSchool SMS assigns the first code in the daily attendance code rules list [p. 190].

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[1]You can do this if your role is School Administrator

To clear attendance records [SA[1]]:

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.

2 Under **Attendance**, click **Clear Attendance**. The Clear Attendance page appears.

3 Under Step 1, select the students for whom to clear attendance. Options include:
- **All students**
- **Saved Student List** [p. 46]
- **Student number**

4 Under Step 2, select the classes for which to clear attendance. Options include:
- **All classes**: Select the **Clear daily codes** check box to remove any overrides in the attendance records. **Note**: An elementary School Administrator has the option of clearing all homerooms and classes.
- **Selected classes**: Specify one or more classes.

5 Under Step 3, set the dates on which attendance is to be cleared. Options include:
- **Entire school calendar year**
- **Today**
- **Date range**: The range can include future dates.

6 Click **OK**. A confirmation dialog appears with the clearance criteria listed.

7 Click **OK**.

Clearing a record of attendance taking

As a School Administrator, you may encounter circumstances in which you need to clear a record of attendance having been taken; for example, when a Teacher has made a mistake in recording attendance and the record needs to be changed.

Clearing a record of attendance taking involves clearing *submit flags*. You can clear submit flags for any or all classes for a date or date range in the current Active Calendar year. In a school that takes attendance twice daily [p. 181] you can clear submit flags for an entire day, but you cannot clear them for only the morning or afternoon.

To clear attendance submit flags [SA[2]]:

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.

2 Under **Attendance**, click **Clear Submit Flags**. The Clear Submit Flags page appears.

3 Under Step 1, select the classes for which to clear the flags. Options include:
- **All classes**: **Note**: An elementary School Administrator has the option of clearing all homerooms and classes.

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[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.

- **Selected classes**: Specify one or more classes.
4 Under Step 2, set the dates for which to clear the flags. Options include:
    - **Entire school calendar year**
    - **For today**
    - **Date range**: The range can include future dates.
5 Click **OK**. A confirmation dialog appears with the clearance criteria listed.
6 Click **OK**.

Reviewing information-changing activity

A School or District Administrator can review the activity of user accounts on a PowerSchool SMS system. This is made possible by PowerSchool SMS's *Database Audit Log*, which contains a time-stamped record of any action that changes the information stored in the system [*Figure 93*].

Figure 93: Database Audit Log sample records

A   **Date**: The date and time of the change.
B   **User Name**: The name and User ID of the user account responsible for the change. Where an automated process (such as nightly calculations) was responsible for the change, this field is blank. **Note**: User Name and ID are not recorded for student enrollment audit entries.
C   **Type**: Indicates the functional area of the system associated with the change.
D   **Description**: Describes the change. "From" indicates the state of the information before it was changed. "To" indicates the new information. "N/A" indicates that there was no information.

In general, changes to information are recorded while changes to system setup, such as modifications to the grading structure, are not. The Database Audit Log includes records of user-made changes to the following:

- Student academic plans [p. 100], including notes
- Academic plan setup [p. 269], including assigned courses, eligibility rules, groups and plan versions
- Attendance [p. 76]
- Grade level transfers and any resulting attendance reassignments
- Modifications to daily code calculation rules, including rule priority changes
- Student health records

- Student historical transcript records [p. 204]
- Gradebook task and server errors
- GPA and honor roll definitions during Year-End Processing [p. 450]
- Grading calculation overrides, including GPA, credit, honor roll, and class rank overrides
- Student enrollment [p. 165]
- cTools fields [p. 505] of the following type: Alphanumeric, Numeric, Date, Yes/No, Setup List (not Memo or File). The cTools field must be on a schema that has been enabled for auditing. You can enable any schema you create in cTools for auditing via the Add/Edit Page page associated with any new grid.
- Setup list pairs
- Attendance change reasons [p. 626]

The Database Audit Log also records the following:

- Course deletions from a student's Academic Plan [p. 100] as a result of a course deletion from the district Planning Calendar course catalog made by PowerSchool SMS during Year-End Processing [p. 450].
- Online Course Recommendations: All course recommendation modifications and deletions [p. 110].
- Online Course Requests [p. 231]

PowerSchool SMS logs some changes immediately and others during an overnight auditing process. The default time at which PowerSchool SMS conducts its audit is 8:00 pm. **Note**: If PowerSchool SMSfails or times out in an attempt to audit a particular feature during its overnight process, it records the failure in the Database Log as a "Task Manager Event" and alerts [p. 32] the District Administrator with the message "Audit log tasks could not be completed". **Note**: A District Administrator can change the default auditing time by updating two fields in the CSL_Task table; set the LAST_RECURRED_ON field to '1900-01-01 00:00:00.000' and set the START_ON field to the date and time the task should start running.

You can view the Database Audit Log's records according to date range, district, school, student, user account, and functional area of the system. You also have the option of clearing the log of the records you view.

To view Database Audit Log records [SA, DA[1]]:

1 In the **Admin** menu, click **District Setup. The District Setup page appears.**
2 Under **Audit Log**, click **Database**. The Database Audit Log page appears.
3 Set search criteria, which include:
   - **Type**: Specifies the functional area of the system. Select "Year-End" to view activity related to Year-End Processing [p. 450].
   - **School**: Specifies changes to information pertaining to all schools in the district ("All"), a specific school, or district-related information

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[1]You can do this if your role is School Administrator or District Administrator.

not specific to any school ("None"). See also *Auditing student enrollment* **[p. 165]**.

- **Date range**: Sets the days from which to retrieve the records.
- **User Name**: Identifies the user for which to retrieve records. The User ID associated with a user account [p. 236].
- **Student ID**: Identifies the student for which to retrieve records.

4 Click **Search**. Under **Search Result,** PowerSchool SMS displays a list of records [*Figure 93*].

- You can print the listed records [*Printing a grid* p.27].
- You can clear the Database Audit Log of the listed records: in the **Actions** menu click **Clear Logs**.

Table 25: **Permissions pertaining to the Audit Log**

To	You need this permission	Set to	Details
View the Audit Log	**School Setup > View Audit Log**	Yes	[p. 731]
Print an Audit Log report	**School Setup > View Audit Log**	Yes	[p. 731]
Clear the Audit Log	**School Setup > Purge Audit Log**	Yes	[p. 724]

Auditing student enrollment

The Database Audit Log provides a convenient way to double-check student enrollment. Reviewing the log is especially useful for the following circumstances:

- A student is attending more than one school in the district (visible to a District Administrator)

  For the **School** search criteria, a choice of "All" may generate two records for one change made to information for a student whose home school differs from his school of enrollment.

  For the **School** search criteria, a choice of the student's home school generates records for all enrollments and withdrawals at all schools in the district.

  For the **School** search criteria, a choice of a school that is not the student's home school generates records for enrollments and withdrawals at that school only.

- A student has transferred from one school to another

When a student is transferred from one school to another, PowerSchool SMS logs a withdrawal at student's original school and an enrollment at the student's new school.

  For the **School** search criteria, a choice of the student's home school generates records for all enrollments and withdrawals at all schools, even if the student does not attend the home school.

Also of note regarding enrollment:

- PowerSchool SMS does not log the name of the user who makes an enrollment or withdrawal change.
- PowerSchool SMS enables you to track enrollment errors by logging enrollment records with a status of N/A.

- PowerSchool SMS logs enrollment data that is mass-assigned. However, imported enrollment data and enrollment records generated during Next Year Preparation [p. 435]/Year-End Processing [p. 450] are not logged.

Reviewing user activity

Primarily for security purposes, a School or District Administrator can review which users logged on to the system, when a user logged on or off, the user's IP address and school, and the browser and operating system used. This involves consulting the *Web Audit Log* [*Figure 94*].

Figure 94: Web Audit Log sample records

A **Event**: Possible events are "Sign in" and "Log off". A session timeout (that is, when a logged-in user's session expires due to inactivity) is not logged as an event.

B **School**: Identifies the school associated with the User ID. For a district-level user, this column is empty.

C **Browser**: The user's web browser; for example, "IE 8.0" (Internet Explorer).

D **Platform**: The operating system of the user's computer; for example "WinXP" (Windows XP).

To view Web Audit Log records [SA, DA[1]]:

1 In the **Admin** menu, click **District Setup. The District Setup page appears.**

2 Under **Audit Log**, click **Web**. The Web Audit Log page appears.

3 Set search criteria, which include:
   - **User ID**: Identifies the user for which to retrieve records. The User ID associated with a user account [p. 236]
   - **IP Address**: Specifies the IP address through which the user gained access to the system.
   - **Date Equals**: Sets the range of time in which to look for user activity.

4 Click **Search**. Under **Search Result,** PowerSchool SMS displays a list of records [*Figure 93*].
   - You can print the listed records [*Printing a grid* p.27].
   - You can clear the Web Audit Log of the listed records: in the **Actions** menu click **Clear Logs**.

Th*e Security Audit Summary* [p. 598] and the *Security Audit Details (by Time)* [p. 598] reports are also useful for reviewing user activity.

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[1]You can do this if your role is School Administrator or District Administrator.

Making information available for parents to view

You can make a student's information— grades, attendance, and discipline incidents— available for parents to view securely on the web through Pearson's parent portal, *ParentCONNECTxp*™. A School Administrator can control which student's information is available to post on ParentCONNECTxp [p. 167]. Also, a student can use ParentCONNECTxp to submit course requests [p. 231].

ParentCONNECTxp 4.1 works with PowerSchool SMS 8.0 or later and PowerTeacher Gradebook version 1.2.2 or later.

Preventing the viewing of a student's information

By default, each students' grades, attendance, and discipline information is available for uploading to ParentCONNECTxp where parents can view it. If necessary, you can exclude a student's information from the uploading process.

To exclude a student's information from uploading [SA[1]]:

1   Locate and view the student's record [p. 54]. The Edit Student Demographics page appears.
2   On the **School Specific** tab, clear the **Upload to parent portal** check box.
3   Click **Save**.

Maintaining information availability

Due to the evolution of PowerSchool SMS and its database architecture, it may be necessary to periodically *map* information stored in a system [*About data mapping* p.167]. Mapping ensures that all the information stored in a PowerSchool SMS system is available for reports [p. 114].

Note: If a system relies on mapping, system users may be subject to some constraints as to data entry for grading and scheduling setup. For more information, refer to the *Data Mapping Constraints Technical Bulletin*.

About data mapping

PowerSchool SMS is a mature software product that Pearson has enhanced over many years of continuous development. Moreover, there are many PowerSchool SMS systems in operation storing large amounts of data. Enhancements to PowerSchool SMS are constrained by older aspects of its database architecture. Recent versions of PowerSchool SMS bypass these constraints by using a new database schema or *tables*. These developments make it necessary, however, to consolidate the data in the old schema, that is, in common tables.

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[1]You can do this if your role is School Administrator.

To be more specific, certain data stored in a PowerSchool SMS schools, such as student class schedules, attendance, and grading, is stored in a new set of database tables. For this data to be available to reports and for uploading to a parent portal [p. 167], it must be transferred to the common set of tables.

For details as to which tables are mapped, refer to the *PowerSchool SMS Data Dictionary* [p. 129].

Mapping a system's data

You can map a system's data when necessary or set up a regularly scheduled time for PowerSchool SMS to do it automatically. Allow up to eight hours for the mapping process.

Caution: Before mapping a system's data, we recommend that you back up your system's database [p. 385].

Note: After mapping is complete, we recommend that you perform Database Maintenance [p. 380]. This improves the performance of tasks that rely on the mapped data, such as reports.

Note: After mapping is complete, we recommend that before running extracts and EIS reports (for Tennessee customers) you run district calculations.

To map a school's data [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Tools**, click **Data Mapping**. The Data Mapping page appears.
3 Select the school(s).
   - You can select more than one school.
4 In the **Actions** menu click **Map Data**.

To schedule PowerSchool SMS to map data automatically [DA[2]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Tools**, click **Schedule Data Mapping**. The Schedule Data Mapping page appears.
3 Select the **Recurring schedule for all schools** check box.
4 Specify the frequency and **Starting on** date.
5 Click **OK**.
   - PowerSchool SMS maps data at the scheduled time indefinitely, that is, until you select the **No recurring schedule** check box.

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[1]You can do this if your role is District Administrator.
[2]You can do this if your role is District Administrator.

School setup

One PowerSchool SMS system serves a school district. A typical school district has many schools. Each school in the system can have a unique setup; however many aspects of a school's setup are derived from options set at the district level [p. 251]; for example, grade levels, district calendar, course catalog, and so on. Thus, district setup precedes a school setup.

Typically, a District Administrator determines the initial setup of a school. Starting from this initial setup, a School Administrator is able to adjust his or her school's setup to best serve its needs.

Setting up a school involves (in the preferred order):

- *School calendar setup* [p. 169]
- *Scheduling* [p. 280]
- *Attendance setup* [p. 181]
- *Grade level setup* [p. 199]
- *Facility setup* [p. 200]
- *Grading setup* [p. 204]

School setup may also involve the following:

- *Awards setup* [p. 214]
- *School staff* [p. 215]
- Program Management: Refer to the *PowerSchool SMSProgram Management Guide* *Program Management Guide*.
- Importing and exporting data: Refer to the *PowerSchool SMSImport/Export Guide*.
- Customizing system pages [p. 472].

To set up a school, a user must be assigned a role as a School Administrator and have a staff record assigned to the school [see *User setup* p.236].

School calendar setup

A school's calendar is the foundation upon which other aspects of the school's setup and operation are laid out. A school calendar is a prerequisite for setting up any other aspect of the school. In a PowerSchool SMS system, a school has three types of calendars [*Figure 95*]:

- *Active Calendar* [p. 172]: The calendar for the current school year. At the end of the school year, when the district runs Year-End Processing [p. 450], PowerSchool SMS converts this calendar into a Historical Calendar. A school can have only one Active Calendar. For other Active Calendar considerations, refer to *School Active Calendar* [p. 172].
- *Planning Calendar* [p. 172]: The calendar used to plan the coming school year, including scheduling classes and enrolling students. At the end of the school year, when the district runs Year-End Processing [p. 450], PowerSchool SMS converts this calendar into the Active Calendar. A school can have only one Planning Calendar. For

other Planning Calendar setup considerations, refer to *School Planning Calendar setup* [p. 174].

- *Historical Calendar* [p. 176]: A former Active Calendar for a past school year. The system can hold several historical calendars. For other Historical Calendar considerations, refer to *School Historical Calendar* [p. 176].

Figure 95: School Calendars page

	*School calendar name	*Start (mm/dd/yyyy)	*End (mm/dd/yyyy)	Creation Date (mm/dd/yyyy)	Release	Associated District Calendar	Type	Work with
☐	Crystal 2012-2013	07/13/2012	07/11/2013	03/02/2012	6.7.1.0102	2012 - 2013	Planning	○
☐	Crystal 2011-2012	07/13/2011	07/11/2012	03/07/2011	6.6.4.0304	2011 - 2012	Active	◉
☑	Crystal 2010-2011	07/12/2010	07/12/2011	03/08/2010	6.5.4.0008	2010 - 2011	Historical	○

Selected: 1   Total:7

Table 26: Permissions pertaining to school calendar setup

To	You need this permission	Set to	Details
Create, edit, or delete school active or Planning Calendars	**School Setup > Define School Calendar**	Yes	[p. 717]

Managing a school's calendars

To manage a school's calendars [SA1]:

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.
2 Under **Calendar**, click **School Calendars**. The School Calendars page appears [*Figure 95*].
3 To change a calendar's name, click the calendar and in the **School Calendar Name** column, enter a new name.
   - The name must be unique among calendars in the system.
4 To change a calendar's date range, click the calendar and in the **Start** and **End** columns change the dates.
   - Warning: Be extremely cautious with date changes. Changing the date range of a calendar can affect scheduling and attendance.
5 To delete a Planning Calendar, select the calendar and in the **Actions** menu click **Delete Calendar**.
   - You cannot delete an Active or Historical Calendar.
   - If you delete a Planning Calendar, you will need to recreate any Planning Calendar-specific data you had entered.
6 Click **OK**.

To create a school's Planning Calendar [SA2]:

1 In the **Admin** menu, click **School Setup**. The **School Setup** page appears.

---

[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.

2 Under **Calendar**, click **School Calendars**. The School Calendars page appears [*Figure 95*].

3 To create a new calendar, in the **Actions** menu click **Add Calendar**. PowerSchool SMS adds a new row to the list of calendars and enters the date the calendar was created, the release in which the calendar was created, the name of the associated district calendar, and a calendar type of "Planning".

- If a school has the calendars it needs, **Add Calendar** is not available.

4 Set options, which include:

- **School Calendar Name**: A unique name describing the calendar, such as "2007-2008".
- **Start** and **End**: Sets the date range, ensure:
  - Is from 1 to 550 days. A typical number of days is 365.
  - Includes a number of days at least double the number of terms.
  - Encompasses all attendance reporting periods [p. 185].
  - Encompasses all scheduling term reporting periods [p. 185].
  - Encompasses all grading periods [p. 204].
  - Does not overlap any other school calendar.
- Ensure that the **Start** date:
  - Is at least one day before students actually attend school, so that the start date is not the same day that the first Attendance Reporting Period begins.
  - Is on or after the Start date of the district calendar identified in the **Associated District Calendar** column.
  - Is the same day of the week as the Start date of the Active Calendar. This is because on a system that employs program management, program session start dates are linked to the Planning Calendar's start date.
  - Is later than the district calendar start date at a school that has a year-round calendar where returning students receive both a withdrawal and enrollment code.
- Ensure that the **End** date is on or before the End date of the district calendar identified in the **Associated District Calendar** column.

5 View other information, which includes:

- **Creation Date**: The date the calendar was created.
- **Release**: The PowerSchool SMS software release number in use when the calendar was created.
- **Associated District Calendar**: The district-level calendar associated with this particular school calendar. A change in one may cause a change in the other [p. 174].
- **Type**: The type of calendar, such as Active see *School Active Calendar* [p. 172], Planning see *School Planning Calendar* [p. 172], or Historical see *School Historical Calendar* [p. 176].

6 Click **OK**.

Switching between school calendars

Typically, a School Administrator works with the school Active Calendar. However, for such purposes as planning or reporting [see p.119], the administrator can switch the calendar in use to the planning calendar.

PowerSchool SMS indicates that the Planning Calendar is in use by highlighting the Planning Calendar button and by displaying a green color scheme [*Figure 96*].

When a School Administrator signs in, PowerSchool SMS displays the last calendar the administrator used.

Figure 96: Calendar indicator
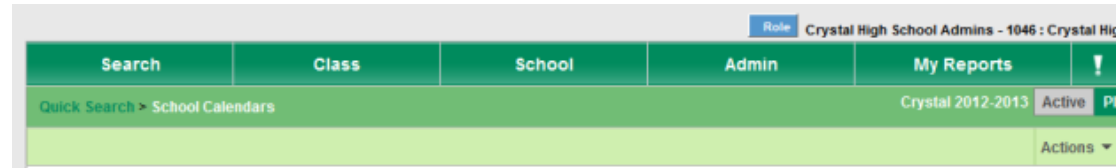
A **Planning**: When highlighted, indicates that the Planning Calendar is in use.

To switch school calendars:

Click **Planning**. PowerSchool SMS switches to the Planning Calendar.
- Click **Active**. PowerSchool SMS switches to the Active Calendar.

Or

1 On the Home page [p. 15], in the **Actions** menu, click **Switch Calendar**. The School Calendars page appears [*Figure 95*].
2 In the **Work with** column, select the appropriate calendar's check box.
3 Click **OK**.

School Active Calendar

A school's Active Calendar spans the current school year, which includes all preparation days at the beginning of the year and makeup days at the end. A school's Active Calendar is associated with the district' Active Calendar [p. 252]. The system has only one Active Calendar. A School Administrator can view the Active Calendar by switching to it [p. 171].

A school's Active Calendar is created when the District Administrator first adds the school to the system. PowerSchool SMS creates the school's Active Calendar, using the dates of the district's Active Calendar; these dates can be adjusted to the school's requirements. The school can then create a Planning Calendar whenever they deem it appropriate to do so. During Year-End Processing [p. 450], PowerSchool SMS converts that calendar into an Active Calendar for the new year.

School Planning Calendar

The Planning Calendar enables a School Administrator to prepare for the next school year (also known as *next-year preparation*) [p. 435]. During Year-End Processing [p. 450], PowerSchool SMS converts the Planning Calendar to the Active Calendar (and the Active Calendar becomes a Historical Calendar). A school has only one Planning Calendar.

When a School Administrator is working with the Planning Calendar see *Switching between school calendars* [p. 171], the information available differs from that of the Active Calendar. In general, the administrator has access to less than the Active Calendar and the information available supports the planning process [*Figure 97*]. The information includes.

- **Student**: Enables you to work with students who will be attending the school next year.
- **User Settings**: Enables you to pre-define the way columns of data display.
- **School Setup**: Including the following:
  School Calendars
  Attendance Reporting Periods
  Day Types (setup list)
  Calendar Day Exceptions
  General Settings
  Homerooms
  Courses: Appears if Secondary Scheduling is employed OR **Subject Framework**: Appears if Elementary Scheduling is employed.
  Grade Levels (setup list)
  Buildings and Rooms
  Program Setup
- **Scheduling**: Enables you to schedule students who will be attending the school next year.
- **District Setup**: Enables you to view courses and subjects, and the district calendar.

Figure 97: Planning Calendar School Setup page example (secondary school)
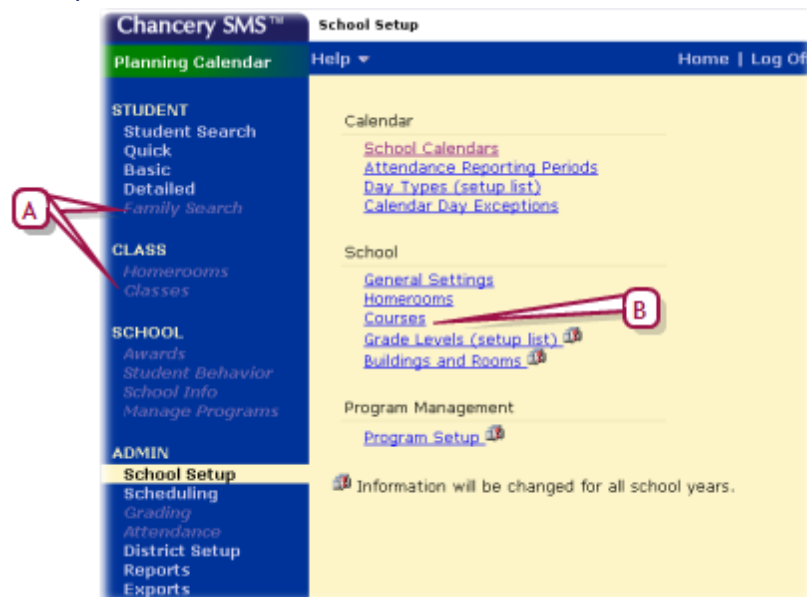
A   Grayed out link: Indicates that you do not have access to this link in this calendar.

B **Courses**: Appears for a school using secondary scheduling in its planning. If the school uses elementary scheduling in, PowerSchool SMS displays **Subject Framework**.

School Planning Calendar setup

A School Administrator can only create the school's Planning Calendar after the district Planning Calendar is created.

Many elements of the school's Planning Calendar are shared with its Active Calendar. Thus any changes to these elements in one calendar affect both calendars. Such elements include:

- Grade levels
- Saved lists
- Staff: Except staff course preferences
- Users
- Buildings and rooms
- Program setup

Some elements of the school Planning Calendar are set up in the school Active Calendar only (that is, these elements cannot be changed in the school Planning Calendar). When a School Administrator makes a change to one of these elements in the school Active Calendar, the change also affects the school Planning Calendar. These elements include:

- Alerts
- Attendance codes
- Attendance exception rules
- Attendance rules for credit calculations
- Awards
- Daily code calculation rules
- Default attendance settings
- Minutes-based attendance
- Student photos
- Supplementary attendance
- Transcript grade items

Some elements of a school's Planning Calendar are copied from its Active Calendar when the School Administrator creates the Planning Calendar. Thereafter, these elements in the two calendars are separate—any changes to the elements in the Active Calendar do not affect their counterparts in the Planning Calendar. Indeed, some of these elements must be modified to suit the year being planned. Such elements include:

- Address exceptions: Schools can be set up so that approved Address Exception records for students returning to the same out-of-zone school are copied from the Active to the Planning Calendar each time the Next-Year Preparation nightly process runs. For detailed information, refer to the *Address Validation Guide*.
- School-defined scheduling constraints: PowerSchool SMS copies school-defined constraints [p. 310] when a School Administrator creates the Planning Calendar. Subsequent changes made to such

constraints in the school Active Calendar do not affect the Planning Calendar, and changes made in the Planning Calendar do not affect the school Active Calendar.

- Course properties: Including room, room type, and department
- General settings
- Homerooms: All homeroom settings, including Teachers and Grades
- Program sessions: PowerSchool SMS copies program sessions to the Planning Calendar the first time the Next-Year Preparation nightly process runs. Subsequent changes made to program sessions in the school Active Calendar do not affect the school Planning Calendar and changes made in the Planning Calendar do not affect the Active Calendar. For information about program sessions, refer to the *Program Management Guide* .
- Staff course preferences: Staff course preferences are calendar-specific. PowerSchool SMS copies staff course preferences to the Planning Calendar only if a new planning schedule is copied from the Active Calendar. When the new planning schedule is created, staff course preferences apply to the entire Planning Calendar and all planning schedules. After staff course preferences are copied, each time the administrator copies to a planning schedule from the Active Calendar, any staff course preferences that do not exist in the Planning Calendar are updated from the Active Calendar. If a course preference is already set in the Planning Calendar, the value is not updated. Staff course preferences deleted only in the Planning Calendar are re-copied from the Active Calendar and staff course preferences deleted in the Active Calendar are retained in the Planning Calendar. To remove or change course preferences, you must make the change in both the Active Calendar and the Planning Calendar. Deleting the Planning Calendar after staff course preferences are copied from the Active Calendar does not delete the staff course preferences for the Planning Calendar.
- Student behavior

Some elements of a school's Planning Calendar are neither copied from the Active Calendar nor linked to it. The School Administrator must set up these elements in the Planning Calendar.

- Address exceptions: For graduating or withdrawn students
- Attendance reporting periods
- Calendar day exceptions
- Courses and subjects: These are derived from the catalog published in the district Planning Calendar. A District Administrator assigns courses to each school.
- Day types: When the administrator creates the Planning Calendar, PowerSchool SMS sets up default day types.
- Scheduling: When the administrator creates a Planning Calendar, PowerSchool SMS includes a blank Planning Schedule. To configure the Planning Schedule(s), the administrator can copy schedule settings from the school's Active Calendar.

School Historical Calendar

Once an Active Calendar is converted to a Historical Calendar by PowerSchool SMS, school and district personnel can no longer make changes to it. For information about viewing the data in a historical calendar, contact Technical Support [see p.1].

Day types

On a calendar, each day of the week is assigned a *day type*. The day type determines when attendance is taken (if at all) and how that day's attendance and student membership are tallied in reports [*Reporting on information*[p.114]. A PowerSchool SMS system has three *base day types*: Normal School Day, Weekend, and Holiday [*Figure 98*].

Figure 98: Day Types Setup List

Selected: 1   Total:15

	Description	Short Code	Day Value	Take Att.	Instructional
☐	Half1	H1	0.5	Y	Y
☐	Half2	H2	0.5	Y	
☑	Half3	H3	0.5		Y
☐	Half4	H4	0.5		
☐	Holiday	H	0		
☐	Normal School Day	N	1	Y	Y
☐	Snow1	S1	1		

A **Day value**: The day's value where attendance is tallied by value rather than occurrence [p. 114].
B **Take att.**: Determines if attendance is due to be taken on this day [p. 76].
C **Instructional**: Determines if this day is considered an instructional day.

Note: The default properties for each type are shown.

A School Administrator can use the base day types as they are or use them as the basis for defining additional day types [p. 177]. By default, PowerSchool SMS assigns to weekdays the Normal School Day type and to weekend days the Weekend day type. For example, if the school offers classes on Saturday, you can set the day type for Saturday to Normal School Day. The administrator can change the default day type assigned to a day (later on, you can assign a day type to specific dates in the calendar).

To change the default day type assigned to a day of the week: [SA[1]]

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.

---

[1]You can do this if your role is School Administrator.

2 Under **Calendar**, click **Day Types (setup list)**. The Day Types page appears. This page displays the day types available in the **Day Type Setup List** panel [*Figure 98*], and the day types assigned to the days of the week.

3 In the **List Settings** panel, click **Edit**. The List Settings page appears.

4 Change the default setting for the day of the week.

5 Click **OK**.

Defining day types

You supplement the base day types provided by PowerSchool SMS with day types of your own; for example, if your school has an early dismissal day once a month, you can create an "Early Dismissal" day type, or if your area is subject to periodic heavy snowfalls, you can create a "Snow Day" day type.

To define a day type [SA[1]]:

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.

2 Under **Calendar**, click **Day Types (setup list)**. The Day Types page appears.

3 From the **Actions** menu, click **Add Day Type**. The Add Day Type page appears.

- To change a day type, in the **Description** column, click its name. The Edit Day Type page appears.
- To delete a day type, select the day type and in the Actions menu click **Delete Day Type**.

4 Enter or change the information, which includes:

- **Description**: The day type's name, such as "Professional Day" or "Snow Day".
- **Short code**: A short name, such as "P" or "S".
- **State equivalent**: A description used for state reporting purposes. Note: The State Day Type Code setup list (handled by a District Administrator) determines the options available. Caution: If you change this value, reports for the state may be inconsistent among schools.
- **Base Day Type**: The day type on which to base the values for this day type. For a Snow Day, use "Holiday".
- **Day Value**: The day's value where attendance is tallied by value rather than occurrence [p. 114]. Typical values are 1.00, 0.50, and 0.00 Applies only if Base Day Type is "Normal School Day".
  - For once-daily attendance [p. 181], enter Present and Absent code values of 1.00. For twice daily attendance [p. 181], enter Present and Absent code values of 0.50. In both cases, the value counts as one student per day.
  - For half-day homerooms, use 1.00, unless you want to report a half count for half-day homerooms, in which case use 0.50.

---

[1]You can do this if your role is School Administrator.

- **Take Attendance**: Determines if attendance is due to be taken on this day [p. 76]. Applies only if Base Day Type is set to "Normal School Day".
- **Instructional Day**: Determines if this day is considered to be a day on which students receive instruction. Applies only if Base Day Type is set to "Normal School Day".
- **Use for Defaults in Day Type List Settings**: Indicates that this day type can be used as a default day type [p. 176]. Applies only if the school employs secondary school scheduling. If this is set to "No" and Instructional Day to "Yes", then PowerSchool SMS treats this as an exception day [p. 178], and you must specify the bell schedule for this exception day type. For a Snow Day, set to "Yes".

5 Click **OK**.

Exception days

An *exception day* is any interruption in the pattern of default day type assignments; for example, a snow day (a day on which the school is closed due to heavy snowfall) or when the Thanksgiving Day holiday falls on a Friday (this particular Friday would be designated an exception day). Since PowerSchool SMS assigns day types to all the days of the week in a school calendar (using the default day types), you assign an exception day to a specific date or date ranges as necessary. When you designate a specific date as an exception, you assign it a day type, typically "Holiday".

Note: When you designate exception days with Holiday or Weekend base day types, existing Weekend days, as based on your school calendar start and end dates and the default day type settings, are retained. Only Normal School Day types are updated with the new exception day.

Note: When you designate exception days with a Normal base day type, existing Weekend and Holidays are overwritten. This is useful when scheduling exception days, such as Make Up days, on a Saturday or Sunday, where you want the Make Up days counted as Normal school days, not Weekend or Holiday days.

Note: If you plan to designate the current day or a past day as an exception day, you must select a day that has the same base day type as the day to which you want to apply this exception day; so that all the periods for both days match for any attendance that might have been taken.

Note: At a school that employs secondary school scheduling in a relative day pattern, when you create an exception day, you must specify when you want this exception day to begin; that is, you must specify where you want to insert this exception day into your school schedule.

To assign an exception day to a day [SA[1]]:

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.
2 Under **Calendar**, click **Calendar Day Exceptions**. The Calendar Day Exceptions page appears.

---

[1]You can do this if your role is School Administrator.

- This page displays a breakdown of the base day types in your calendar. This is useful to ensure that your calendar holds the required number of instructional days.

3 In the **Actions** menu click **Add Exception Day**. The Add Exception Day page appears.

4 Enter or change the information, which includes:
- **Exception day description**: For example, "Christmas Vacation" or "Snow Day".
- **Date**: A specific date or date range.
- **Day Type**: The base day type [p. 176]; for example, "Holiday", or "Snow Day" if you have defined such a day type [p. 177].
- **Bell Schedule Based on Day**: Applies only to a school that employs secondary scheduling. If the Day Type is "Normal School Day" and you are using a relative day pattern, select which relative day's bell schedule you want for this exception day [p. 178].

5 Click **OK**.
- At a school that employs secondary school scheduling with a relative day pattern [p. 180], click **Continue** to verify or change the regular day pattern following this exception day.

Bell schedules and an exception day

At a school that employs secondary school scheduling and a relative day pattern [p. 180], it may be necessary to set the bell schedule for an exception day. **Note**: *Data mapping [p. 168] relies on consistent bell schedules.*

To set the bell schedule for an exception day [SA[1]]:

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.

2 Under **Calendar**, click **Day Types (setup list)**. The Day Type List page appears.

3 In the **Actions** menu click **Add Day Type**. The Add Day Type page appears.
- Or click a day type. The Edit Day Type page appears.

4 Set **Instructional** to "Yes".

5 Set **Use for defaults in day type list** to "No".

6 Click **Continue**. The Bell Schedules page appears.

7 Enter or change information, which includes:
- **Bell Schedule Based on Day**: The day type the bell schedule of which this exception day employs. Does not apply if you are setting up exception days before school starts. **Note**: If you plan to apply this exception day to the current day or a past day, you must select the same day type as the day to which you wish to apply this exception day; so that all the periods for both days match for any attendance that might have been taken.
- **Scheduling group**: The scheduling group to which the bell schedule belongs.

---

[1]You can do this if your role is School Administrator.

- **Start Time** and **End Time**: The start and end time for each period.
- **Period Name** and **Label**: Defined in the Bell Schedules page for the regular day.
- **Details**: Holding the cursor over the icon reveals the period's details. To change the details, click the icon.

8   Click **OK**.

Relative day patterns

A *relative day pattern* is a sequence of day types. A relative day pattern enables you to schedule classes based on days that rotate through the school instructional days, skipping holidays and weekends. For example, you can define a Red day and a Blue day, which alternate for each instructional day. Using this pattern, when a holiday lands on a Blue day, the next instructional day becomes a Blue day.

When you use relative days, you must specify the date that the pattern begins and indicate which relative day is applied to the first day; for example, if school begins September 6, you can specify that the first day of school is a Red day. If classes are interrupted during the school year (the school closes due to heavy snow, for example), you can change the relative day assigned to the next instructional day.

You can only apply a relative day pattern if relative day patterns are set up at your school [p. 356]. You can set up relative day patterns in the Active or Planning Calendar.

Note: You cannot apply a relative day pattern to the past (days before today) if attendance has already been taken for those days. If you apply a relative day pattern to a future date and attendance has already been taken for those future dates, the attendance for those future dates is deleted.

You can only apply a day pattern to regular days. A regular day meets all of the following conditions:

- Base day type is "Normal School Day".
- Instructional day is "Yes".

To view relative day pattern assignments [SA[1]]:

1   In the **Admin** menu, click **School Setup**. The School Setup page appears.
2   Under **Calendar**, click **Relative Day Pattern**. The Relative Day Pattern page appears.
3   In the **Calendar Day Search** panel, search for the relative day pattern assignment.

To apply a day pattern [SA[2]]:

1   In the **Admin** menu, click **School Setup**. The School Setup page appears.
2   Under **Calendar**, click **Relative Day Pattern**. The Relative Day Pattern page appears.

---

[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.

3 Under **Apply Regular Day Pattern**, for **Start pattern using day**, select the relative day that you want to apply to the specified date.
4 For **As of date**, set the date on which you want the relative day pattern to begin.
5 Click **Apply Day Pattern**. PowerSchool SMS displays your changes in the **Calendar Day List** panel.

Attendance setup

For the purpose of recording student attendance at a school, you must define how attendance will be taken at a school using the various options provided by PowerSchool SMS. In general, you set up attendance-taking before the school year begins. However, some adjustments are possible as the year progresses. Once you have set up attendance taking at a school, PowerSchool SMS can calculate daily attendance codes for that school on demand or across the district at scheduled times [*Calculating daily attendance codes* p.159].

Setting up attendance-taking at a school involves the following (in order):

- *Setting an attendance method* [p. 181]
- *Setting up supplementary class attendance* [p. 182]
- *Setting up minutes-based attendance (optional)* [p. 184]
- *Defining attendance reporting periods* [p. 185]
- *Setting up school attendance codes* [p. 185]
- *Configuring attendance quick-entry buttons (optional)* [p. 187]
- *Setting the default attendance code* [p. 187]
- *Setting up the daily attendance code calculation* [p. 189]
- *Setting up attendance exception rules* [p. 195]
- *Setting up an attendance rule for credit calculations* [p. 197]
- *Setting up attendance related to student behavior* [p. 198]

Table 27: General permissions pertaining to school attendance setup

To	You need this permission...	Set to	Details
Set up attendance in general	**School Setup > Attendance General Settings**	Yes	[p. 707]

Setting an attendance method

The attendance method determines how often attendance is taken each day and how it is tallied. At a school, you can set up one of three methods for taking attendance:

- *Once-daily*: Attendance is taken once a day, typically in the homeroom.
- *Twice-daily*: Attendance is taken twice a day, typically in the homeroom. By default, half-day homerooms are set to take once-daily attendance based on their interval time (AM or PM).

- *By class*: Attendance is taken in each class. This method is only available to a secondary school.

Caution: Once you set up the attendance-taking method for a school, and schedules have been created or attendance has been taken [p. 76], you can change the attendance method only if you first clear attendance [p. 161].

To set the attendance method for a school [SA[1]]:

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.
2 Under **School**, click **General Settings**. The General Settings page appears.
3 Under **Attendance General Settings**, select the check box of the attendance method you want to use: **Once daily**, **Twice daily**, or **By class**.
4 Click **OK**.
   - After changing the attendance method, we recommend that you run the overnight task POPULATE_TRACK_DATE_HR_ATT. .

Note: For any attendance-taking method, you can specify the assumed attendance, that is, the default attendance code [p. 187].

Table 28: **Permissions pertaining to attendance method setup**

To	You need this permission	Set to	Details
Set up attendance	**School Setup > Attendance General Settings**	Yes	[p. 707]
Set an attendance method	**School Setup > Daily Attendance Calculation Method**	Edit	[p. 713]

Setting up supplementary class attendance

In a school using the once-daily or twice-daily methods, you can also designate individual classes for supplementary attendance taking. Elementary classes [p. 182] are handled differently from secondary school classes [p. 183]. Supplementary attendance does not affect daily attendance code calculations. PowerSchool SMS uses supplementary attendance data for other purposes, such as Program Management. For more information, refer to the *Program Management Guide*.

Supplementary attendance for an elementary class

To designate an elementary class for supplementary attendance, that class must have a meeting pattern [p. 367].

To designate an elementary school class for supplementary attendance taking [SA[2]]:

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

---

[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.

2 Under **Step 4**, click <u>Class Setup</u>. The Class Setup page appears.

3 Find the class.
  - Click <u>Display All Records</u> or search for a specific class.

4 Select the class's check box.

5 Under the **Class Information** panel, select the **Collect Attendance** check box [*Figure 99*].

6 Click **Save**.

Figure 99: Supplementary attendance taking - elementary school class

Supplementary attendance for a secondary school class

To designate a secondary school class for supplementary attendance, that class must have a meeting pattern [p. 367]. For a Teacher to be able to take supplementary attendance for a class, the course to which a class belongs must also be designated for attendance collection.

To designate a secondary school class for supplementary attendance taking [SA[1]]:

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

2 Under **Step 5**, click <u>Master Schedule</u>. The Master Schedule page appears.

3 Find the class.
  - Click <u>Display All Records</u> or search for a specific class.

4 Select the class's check box.

5 Under the **Class Information** panel, select the **Collect Attendance** check box [*Figure 100*].

6 Click **Save**.

7 Ensure that the corresponding course is designated for attendance collection:

  a In the **Admin** menu, click **District Setup**. The District Setup page appears.

---

[1]You can do this if your role is School Administrator.

    b Under **District**, click **Course Catalog**. The Course Catalog Home page appears.

    c Under **Step 3**, click **Courses**. The Course list appears.

    d In the **Number** column, click the course that corresponds to the class. The Course Detail page appears.

    e Ensure that the **Collect Attendance** check box is selected.

    f Click **OK** or return to a previous page.

Figure 100: Supplementary attendance taking - secondary school class

Setting up minutes-based attendance (optional)

You can have the system track the number of minutes students are present in classes. In a school where minutes-based attendance is set up, a class or home room Teacher can record the number of minutes each student was absent from that class and a School Administrator can view daily totals of attendance minutes.

PowerSchool SMS uses the attendance minutes recorded to calculate Daily Attendance Minutes, the result of which is visible only through reports [*Running a report* p.115].

To track the number of minutes a student is in a class or homeroom, that class or home room must be assigned to a meeting pattern [p. 367]that includes periods that are included in the Daily Attendance Minutes calculation. Typically, this is set up before classes convene.

To include a period in the Daily Attendance Minutes calculation [SA[1]]:

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

2 Click **Bell Schedules**. The Bell Schedules page appears.

3 In the **Details** column, click the Details icon in the row for the period you want to set up. The **Edit Period** page appears.

4 Select the **Include in instructional/attendance minutes calculation** check box.

---

[1]You can do this if your role is School Administrator.

- You cannot change this setting if the period is part of a meeting pattern for which attendance has been recorded.

5 Click **OK**.

Defining attendance reporting periods

An *attendance reporting period* is a preset date range used to generate attendance reports on a school's attendance. While a school must have at least one attendance reporting period per school year, a School Administrator can define several periods for the course of a school year; for example, one period per month. The periods must not overlap. Typically, the number of periods a School Administrator creates depends on state reporting requirements.

To define an attendance reporting period [SA[1]]:

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.
2 Under **Calendar**, click **Attendance Reporting Periods**. The **Attendance Reporting Periods** page appears.
3 Create a period:
   a In the **Start** column, click in a cell for the period.
   b Enter a start date in the format mm/dd/yyyy.
   c In the **End** column, click in the cell.
   d Enter an end date in the format mm/dd/yyyy.
4 Click **OK**.

Setting up school attendance codes

When a Teacher or School Administrator records attendance in the system, he or she chooses an *attendance code* that indicates the student's status. To save the Teacher time, each class has a default attendance code (typically, "Present").

A Teacher can choose from a preset list of *school attendance codes*. Every school attendance code has a base type (Present, Absent, or Tardy), subtype (Unexcused), and weighting. You can reserve a code for the use of non-Teachers and set it to expire on a future date. Also, for district reporting purposes, each school attendance code is mapped to a *district attendance code*. A District Administrator maintains district attendance codes [*State attendance code setup* p.264].

For each school, PowerSchool SMS includes several preset school attendance codes, such as Present (a Present type), Absent Unexcused (an Absent type), and Tardy Unexcused (a Tardy type). To supplement these, you can define additional attendance codes; for example, to record a student being absent for a field trip, to track the number of students who buy lunch in the cafeteria.

To set up a school attendance code [SA[2]]:

---

[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.

1. In the **Admin** menu, click **School Setup**. The School Setup page appears.
2. Under **Attendance**, click **Attendance Codes (setup list)**. The Attendance Codes page appears.
   - Or, in the **Admin** menu, click **Attendance**. The Attendance page appears. Under **Step 2**, click **Attendance Codes (setup list)**. The Attendance Codes page appears.
3. In the **Actions** menu click **Add Attendance Code...**. The Add Item page appears.
   - To change an attendance code, in the **Description** column click an attendance code. The Edit item page appears. Or in the Actions menu click **Edit Attendance Code...**.
   - To delete an attendance code, select the attendance code and in the **Actions** menu click **Delete Attendance Code...**.
4. Enter or change Information, which includes:
   - **Description**: A clear description ("Absent - Field Trip", for example) which should be unique among the school's codes. PowerSchool SMS uses this as the code's name in lists visible to Teachers and others who take attendance.
   - **Short code**: A short code ("FT", for example) which should be unique among the school's codes.
   - **State equivalent**: Maps this school attendance code to a district attendance code, which are used for reporting district attendance. A District Administrator sets up these codes [*State attendance code setup* p.264]. Caution: Choosing this code demands care since it affects the consistency of state reporting.
   - **Attendance value**: Specifies the weighting given to Present, Absent, and Tardy. This enables school attendance to be tallied by value. For example, a code named "Field Trip" might have the following values: Present = 1.00, Absent = 0.00, and Tardy = 0.00.
   - **Attendance type**: Specifies the base type: Present, Absent, or Tardy.
   - **Unexcused**: For Tardy or Absent attendance types.
   - **Use for intervals**: The options available depend on the school's attendance-taking method [*Setting an attendance method* p.181]. For example, at a secondary school using daily attendance, the options Daily attendance and Class attendance would be available.
   - **Teacher can use**: Determines if Teachers are able to use this code.
   - **Inactive as of**: Enables you to set an expiry date for the use of the code. This is useful if you want to retain an obsolete attendance code in the system for reporting purposes, or when attendance tracking requirement change. Note: You cannot render inactive an attendance code that is assigned to a student behavior action [*About student behavior* p.89].
5. Click **OK**.

Table 29: Permissions pertaining to attendance code setup

To	You need this permission	Set to	Details
Set up attendance codes	**School Setup > Attendance Code Setup List**	Edit	[p. 706]

Configuring attendance quick-entry buttons (optional)

You can assign the most commonly used attendance codes to three quick entry buttons. These buttons enable staff to record attendance with a single click rather than having to repeatedly select a frequently used code from a list.

To configure attendance code quick-entry buttons [SA[1]]:

1 In the **Admin** menu, click **Attendance**. The Attendance page appears.
2 Under **Step 2**, click **Attendance Codes (setup list)**. The Attendance Codes (setup list) page appears.
   • PowerSchool SMS displays the current quick-entry button configuration under **Default Settings**.
3 On the **Default Settings** panel, click **Edit**. The Default Settings page appears.
4 For each quick-entry button (**A**, **T**, and **P**), select a default attendance code [*Figure 101*].
5 Click **OK**.

Figure 101: Attendance quick-entry button configuration
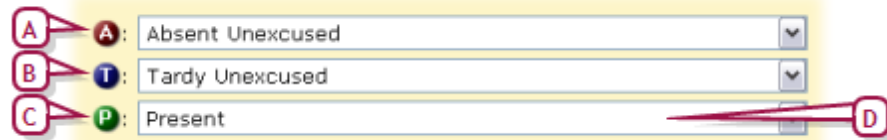
A **A button**: Generally used for an Absent-type attendance code [p. 185]. PowerSchool SMS treat the attendance code chosen as the default attendance code used for the positive attendance method, that is, where students are assumed to be absent [*Setting the default attendance code* p.187].
B **T button**: Generally used for a Tardy-type attendance code [p. 185].
C **P button**: Generally used for a Present-type attendance code [p. 185]. PowerSchool SMS treat the attendance code chosen as the default attendance code used for the exception attendance method, that is, where students are assumed to be present [*Setting the default attendance code* p.187].
D The school attendance code [p. 185] assigned to this button.

Setting the default attendance code

You can specify a default attendance code for the school, that is, the code that PowerSchool SMS assigns to every student in every class and homeroom at the start of each day. You can set the default attendance code to one of the following:

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[1]You can do this if your role is School Administrator.

- **Present**: Also known as *exception attendance*. PowerSchool SMS records the student as present unless a staff member records otherwise. The Present-type school attendance code that PowerSchool SMS records is that which is assigned to the "P" quick-entry button [p. 187].
- **Absent**: Also known as *positive attendance*. PowerSchool SMS records the student as absent unless a staff member records otherwise. The Absent-type school attendance code that PowerSchool SMS records is that which is assigned to the "P" quick-entry button [p. 187].

Caution: Changing the default attendance code has a retroactive effect. If you change the default attendance code after attendance has been recorded, PowerSchool SMS changes all attendance codes that were used by default to the new default attendance code.

To set the default attendance code for a school [SA¹]:

1 In the **Admin** menu, click **Attendance**. The Attendance page appears.
  - Note: Before setting the default attendance code, ensure that you have set up day types [p. 360].
2 Under **Step 2**, click **Attendance Codes (setup list)**. The Attendance Codes (setup list) page appears.
3 Click **Edit**. The Default Settings page appears.
4 Set **Present** or **Absent**.
5 Click **OK**.

Table 30: **Permissions pertaining to attendance code setup**

Task	Permission Name	Set to	Details
Set up attendance codes	School Setup > Attendance Code Setup List	Edit	[p. 706]

Setting a default attendance code for a class or home-room

Once you set a default attendance code for the school, you have the option of setting a different one for specific classes or homerooms; for example, in a school using Present as the default code might have an independent study class that uses Absent. When you change the default attendance code for a class or homeroom, PowerSchool SMS also changes the code associated with the relevant (Present/Absent/Tardy) quick-entry button for this class [p. 187]. The procedure differs by school and class type.

To set the default attendance code for an elementary school class [SA²]:

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

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¹You can do this if your role is School Administrator.
²You can do this if your role is School Administrator.

2 Under **Step 4**, click **Class Setup**. The Class Setup page appears.

3 Find the class.
- Click **Display All Records** or search for a specific class.

4 Select the class's check box.

5 Under the **Class Information** panel, select a **Default attendance code** [*Figure 101*].

6 Click **Save**.

To set the default attendance code for a secondary school class [SA[1]]:

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

2 Click **Master Schedule**. The Master Schedule page appears.

3 Find the class.
- Click **Display All Records** or search for a specific class.

4 Select the class's check box.

5 Under the **Class Information** panel, select a **Default attendance code** [*Figure 101*].

6 Click **Save**.

To set the default attendance code for a homeroom [SA[2]]:

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.

2 Under **School**, click **Homerooms**. The Homerooms page appears [p. 202].

3 Select the homeroom check box.

4 In the **Actions** menu click **Edit Homeroom....** The Edit Homeroom page appears.

5 Select a **Default attendance code**.

6 Click **OK**.

Setting up the daily attendance code calculation

PowerSchool SMS calculates a *daily attendance code* for each student, that is, whether the student is to be recorded as present or absent for the day. PowerSchool SMS uses this code for its daily attendance calculations [*Calculating daily attendance codes* p.159].

In a school that uses the Once-daily attendance method, the daily attendance code calculation is straightforward and PowerSchool SMS makes it by default. In a school that uses the Twice-daily or By class attendance method, this calculation is more complex. In these cases, a School Administrator must choose the calculation method [p. 190] and configure that method [p. 190].

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[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.

To	You need this permission	Set to	Details
Specify the daily attendance calculation method	**School Setup > Daily Attendance Calculation Method**	Edit	[p. 713]
Set up rules for calculating daily attendance using the sample method	**School Setup > Attendance Calc Sample Method**	Edit	[p. 706]
Set up rules for calculating daily attendance using the Occurrence Method	**School Setup > Daily Attendance Occurrence Method**	Edit	[p. 713]
Set up attendance exception rules	**School Setup > Attendance Exception Rules**	Edit	[p. 707]

Choosing a daily attendance code calculation method

You choose the method by which PowerSchool SMS calculates daily attendance code. Your choice depends on the school's attendance method [p. 181]. Your options are:

- **Sample Method**: PowerSchool SMS calculates a daily code based on samples of period attendance code combinations that correspond to a daily attendance code. For example, PowerSchool SMS may assign a student a daily attendance code of "Absent" to a student if that student was recorded absent in period 1 and period 5. With the Sample Method, you must create a sample for every possible combination. This method is mandatory in a school that uses the Twice-daily attendance method.

- **Occurrence Method**: PowerSchool SMS calculates a daily code based on the number of times a specific attendance code is recorded within specific periods. For example, PowerSchool SMS may assign a student a daily attendance code "Present" if that student was recorded present at least twice within periods 1, 4, and 8.

To set the daily attendance code calculation method [SA[1]]:

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.
   - Or, click **Attendance**.
2 Click "Daily Attendance Code Calculation Method". The Daily Attendance Code Calculation Method page appears.
3 Select the check box of a method: **Sample Method** or **Occurrence Method**.
4 Click **OK**.

Configuring the daily attendance code calculation

In a school that uses the Twice-daily or By class attendance, you must set up rules that enable PowerSchool SMS to calculate each student's daily

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[1]You can do this if your role is School Administrator.

attendance code each day. These attendance code calculation rules are also known as *bell rules*.

Attendance code calculation rules only affect how attendance reports are generated, not the attendance records. Typically, you set up calculation rules for a school at the beginning of a school year. You can adjust the calculation rules at any time, however all reports that you run (such as attendance reports, progress reports, and report cards) will generate results according to the new rules, even if the report covers dates prior to the change in calculation rules. However, the results of subsequent attendance reports may be hard to compare to those generated before the rules change. PowerSchool SMS records in its Audit Logs any changes made the daily attendance code calculation rules. You can review such changes, when they were made, and who made them.

A set of attendance code calculation rules consists of an ordered list of rules. PowerSchool SMS processes the rules in order from the top of the list; when it reaches a rule that enables it to generate a daily attendance code for that student, PowerSchool SMS generates the code and stops; it does not process the remaining rules in the list. If PowerSchool SMS reaches the end of the list without generating a code, it sets the student's code to the to the default daily attendance code [p. 187]. **Note**: If you do not set up attendance code calculation rules, PowerSchool SMS sets each student's daily attendance code to the default daily attendance code [p. 187], regardless of whether that student is marked Absent or Present.

The attendance code calculation rules are based on the Attendance Values you have assigned to each Attendance Code [*Setting up school attendance codes* p.185]. You set attendance code calculation rules according the attendance-taking method in use: Sample Method [p. 191] or Occurrence Method [p. 193].

Setting attendance code calculation rules for the Sample Method

Prior to adding rules to your system, we recommend that you first draft those rules on a worksheet. Refer to *Daily attendance code calculation rules planning worksheets* [p. 615] for samples. Refer also to *Additional considerations for setting attendance code calculation rules* [p. 194]. We recommend that you retain a clean copy of such drafts for future reference and records purposes. These drafts also come in handy should you have to seek technical support. Keep in mind that you can also have PowerSchool SMS print a copy of the rules you set.

To set up attendance code calculation rules: [SSA[1]]

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.
  * Or, under **Admin**, click **Attendance**.
2 Click **Daily Code Calculation Rules-Sample Method**. The Daily Code Calculation page appears [*Figure 102*].

---

[1]You can do this if your role is Secondary School Administrator.

3 Select a **Scheduling group**.

4 Select a **Day**.

- You must define the daily attendance code calculation rules for each day in the day cycle.

5 In the **Actions** menu click **Add Row**. A new row appears in the list of rules.

6 For the new rule:

  a Select a code type for each **Period #**.

- "Any Presence" encompasses any attendance code with a Present value greater than 0.
- "Any Absence" encompasses any attendance code with an Absent value greater than 0.
- "Ignore" instructs PowerSchool SMS to disregard any attendance code recorded for the period.

  b Select a **Daily Code**.

7 Add more rules or adjust rules as necessary.

- To delete a rule, select the rule and in the **Actions** menu click **Delete Row**.
- To change a rule, select the rule and change choices as necessary.
- To move a rule up or down the list, select the rule and in the **Actions** menu click **Move row up** or **Move row down**.
- To print the rules set, in the **Actions** menu click **Print**.

8 Click **OK**. PowerSchool SMS starts using this rules set immediately.

- We recommend testing the rules. To do so, record attendance for a student [p. 76], then view that student's daily attendance code [*Figure 103*].

Figure 102: Daily attendance code calculation rules: Sample Method

A **Daily Code**: The attendance code that PowerSchool SMS assigns to the student should this rule be met.

Figure 103: Daily attendance code calculation results summary

Setting attendance code calculation rules for the Occurrence Method

Prior to adding rules to your system, we recommend that you first draft those rules on a worksheet. Refer to *Daily attendance code calculation rules planning worksheets* [p. 615] for samples. Refer also to *Additional considerations for setting attendance code calculation rules* [p. 194]. We also recommend that you retain a clean copy of such drafts for future reference and records purposes. These drafts also come in handy should you have to seek technical support. Keep in mind that you can also have PowerSchool SMS print a copy of the rules you set.

To set up attendance code calculation rules for the Occurrence Method:[SA][1]

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.
   - Or, under **Admin**, click **Attendance**.
2 Click **Daily Code Calculation Rules-Occurrence Method**. The Daily Code Calculation page appears [*Figure 104*].
3 Select a **Scheduling group**.
4 Select a **Day**.
5 In the **Actions** menu click **Add Row**. A new row appears in the list of rules.
6 For the new rule:
   a Set a **#**.
   b Select an **Attendance Code**.
   c Select a **Resulting Daily Code**.
   d Select the periods (**Period 1**, **Period 2**, **Period 3**, etc.) to which these apply.
   - PowerSchool SMS displays the periods defined for the specified **Day**.
7 Add more rules or adjust rules as necessary.
   - To delete a rule, select the rule and in the **Actions** menu click **Delete Row**.
   - To change a rule, select the rule and change choices as necessary.
   - To move a rule up or down the list, select the rule and in the **Actions** menu click **Move row up** or **Move row down**.
   - To print the rules set, in the **Actions** menu click **Print**.
8 Click **OK**. PowerSchool SMS starts using this rules set immediately.
   - We recommend testing the rules. To do so, record attendance for a student [*Taking attendance* p.76], then view that student's daily attendance code [*Figure 103*].

---

[1]You can do this if your role is School Administrator.

A **#**: Specifies the number of times the attendance code must be assigned within the selected periods.

B **Minimum period code occurrence** : Select the attendance code that must be assigned for the specified periods.

C **Resulting day code** : The attendance code that PowerSchool SMS assigns to the student should this rule be met.

D **Period #** : Select the periods in which the attendance code must occur to satisfy the rule.

Additional considerations for setting attendance code calculation rules

When setting up the rules and their order, consider the following:

- Periods

  For a period to be included in the daily attendance code calculation for By Class attendance, the **Include in daily attendance code calculation rules** check box must be selected. (This is the default setting when you set up a period.) **Note**: PowerSchool SMS counts periods, not classes.

- Bell schedules

  You can have a different bell schedule for each scheduling group, and for different days.When a student attends periods from one bell schedule (the period start and end times through a day), PowerSchool SMS uses that bell schedule to calculate daily attendance codes, even if that bell schedule is not the student's primary bell schedule. (Typically, a student's primary bell schedule is assigned by Grade.) For example, a Grade 5 student in classes all on a Grade 6 bell schedule, receives daily attendance based on the Grade 6 bell schedule

  When a student attends periods from more than one bell schedule, PowerSchool SMS uses the bell schedule in which the student attends the greatest number of periods to calculate daily attendance codes. For example, a Grade 5 student in classes mostly on a Grade 6 bell schedule, but also some classes in other bell schedules, receives daily attendance based on the Grade 6 bell schedule.

  When a student attends an equal number of periods from more than one bell schedule, PowerSchool SMS uses the school's initially created bell schedule, that is, the bell schedule which shares the maximum number of periods in which the student is attending for that day. Thus, where a Grade 5 student is scheduled in an equal number of classes in the bell schedules "Grade 5" and "Grade 6", and the School Administrator created the bell schedule "Grade 6" before the bell schedule "Grade 5", that student's daily code is calculated by "Grade 6" bell schedule.

- Scheduling exceptions

  When a student is not scheduled in a period that the daily code calculation rules consider, PowerSchool SMS calculates attendance according to the first rule that matches the student's attendance, except for the unscheduled periods and where "ignore" is selected for the unscheduled periods.

  If this does not apply, PowerSchool SMS calculates attendance according to the first rule that matches the student's attendance, except for the periods in which the student did not have a scheduled class.

  If neither applies, PowerSchool SMS assigns the default daily attendance code.

  For example, if the following attendance code calculation rules are defined for the bell schedule:

  Rule 1: "any presence" in period 1, "ignore" in remaining periods = present

  Rule 2: "any absent" in 1st period, "ignore" in remaining periods = absent

  According to these rules, where a student was scheduled in classes in period 2 through 6, and was marked present for those classes, and was not scheduled in a class in period 1, PowerSchool SMS would set the student's a daily attendance code to Present (based on rule 1). Here's why: the first rule that matches the student's attendance for all of the scheduled periods is rule 1; no rule has "ignore" selected for the unscheduled period.

  By way of another example, if the following daily attendance code calculation rules are defined for the bell schedule:

  Rule 1: At least 3 presents in periods 1, 5, and 8 = Present

  Rule 2: At least 1 absent in periods 1, 5, and 8 = Absent

  According to these rules, where a student was scheduled in classes in period 2 through 8, and was marked present for those classes, but was not scheduled in a class in period 1, PowerSchool SMS would set the student's a daily attendance code to Present (based on rule 1).

- Classes in several consecutive periods

  When a student is scheduled in two or more consecutive periods, depending on your school's general settings, PowerSchool SMS considers each period separately when calculating daily attendance codes.

  Where attendance is taken only once in a class that spans two contiguous periods, the attendance code in the second period defaults to the code in the first period.

Setting up attendance exception rules

Based on the daily attendance code that PowerSchool SMS generates for each student [p. 189], you can have PowerSchool SMS alert you to unusual attendance patterns that merit appropriate action. You can specify each such *attendance exception* by setting up an attendance exception rule [*Figure 105*]. For example, you can set the system to alert the homeroom Teacher when a student is recorded tardy 5 times in a week, or alert the School Secretary when a student is absent on 3 consecutive days.

Figure 105: Attendance exception rules

To set up an attendance exception rule [SA[1]]:

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.
   - Or, click Attendance.
2 Click **Attendance Exception Rules**. The Attendance Exception Rules page appears.
3 From the **Actions** menu, click **Add Attendance Exception Rule...**. The Add Rule page appears.
   - To view a rule, click the rule's name.
   - To edit a rule, click the rule's name and on the Edit Rule Actions page click **Edit** (or select the rule and in the **Actions** menu click **Edit Attendance Exception Rule...**).
   - To delete a rule, select the rule and click **Delete Attendance Exceptions Rule...**.
4 Enter a **Rule name**.
5 Under **Define By**, define the occurrences for which PowerSchool SMS is to watch:
   - Select "Total" to have PowerSchool SMS watch for the total number of occurrences of an attendance code type, such as "Any Absence", "Any Excused Tardy".
   - Or, select "Consecutive" to have PowerSchool SMS watch for the total number of consecutive occurrences (for example, Monday, Tuesday, and Wednesday) of an attendance code type, such as "Any Absence", "Any Excused Tardy".
   - Or, select the **Combined total of the selected codes** check box to have PowerSchool SMS watch for the total number of occurrences of specified attendance codes. Specify the codes in the **Selected codes** list (move them from the **Available codes** list).
6 Set at least one threshold:
   - **1st Threshold** : Specifies the number of occurrences after which PowerSchool SMS takes action. Any number between 1 and 99 is acceptable.
   - **2nd** (and higher) **Threshold**: Option that specifies the next number of occurrences at which PowerSchool SMS takes action. Each threshold must be a higher value than the previous.

---

[1]You can do this if your role is School Administrator.

7 Set the **Count within** period: Specifies the calendar period within which PowerSchool SMS counts occurrences. When the period ends, PowerSchool SMS resets the occurrences to 0. The default period is from the first day of the school year to the last.

8 Click **Continue**. The Edit Rule Actions page appears.

9 Set rule actions:

a Under **Action by Rule Threshold**, set the daily time at which PowerSchool SMS sends any alerts [p. 32] associated with this rule.

b For each **# Threshold**, specify an alert notification [p. 32], if desired.

c Click **OK**.

Table 32: Permissions pertaining to attendance exception rules

To	You need this permission	Set to	Details
Set up attendance exception rules	**School Setup > Attendance Exception Rules**	Edit	[p. 707]

Setting up an attendance rule for credit calculations

You can set the system to deny credit to a secondary student whose attendance record is substandard; for example, to ensure that a student who was absent from a class over 50% of the time does not get credit for that class. A District Administrator can set up such an *attendance rule* for all schools in the district, or a School Administrator for a single school [*Grading setup* p.204].

For the purpose of this rule, PowerSchool SMS:

- Uses class attendance [p. 182], not daily attendance.
- Uses attendance type [p. 185], not attendance values.
- Counts unexcused absences, not excused absences.
- Considers the start date as the first day after the last credit awarding period and the end date as the last day of the credit awarding period [p. 204].
- Considers a credit awarding period as one that contains a credit awarding grade item [p. 204].

For example, a school has four quarters or grading periods. Q2 collects a Semester 1 grade that is credit-awarding, and Q4 collects a Semester 2 grade that is credit-awarding. Attendance is evaluated for the Semester 1 grade from the first day of school to the last day of Q2, and attendance is evaluated for the Semester 2 grade from the first day of Q3 to the last day of Q4.

To set up an attendance rule for credit calculations [SA, DA[1]]:

1 In the **Admin** menu, click **DistrictSetup. The District Setup page appears.**

---

[1]You can do this if your role is School Administrator or District Administrator.

2 Under **Manage Attendance**, click **Attendance Rules for Credit Calculations**. The Attendance Rules for Credit Calculations page appears.

3 Set options:
- **Disregard Attendance in Credit Calculations**: Sets PowerSchool SMS to not take attendance into account. This is the default choice.
- **Use Attendance in Credit Calculations**: Sets PowerSchool SMS to deny credit to a student in any class for which that student meets the absence criterion specified, either a minimum number of classes absent (for example, 5) or a percentage of classes missed (for example, 10).

4 Click **OK**.

Table 33: **Permissions pertaining to attendance rules for credit calculations**

To	You need this permission	Set to	Details
Set up attendance rules for credit calculations at the district	**District > Attendance Rules for Credit Calculations**	Delete	[p. 637]
Set up attendance rules for credit calculations at the school	**School Setup > Attendance Rules for Credit Calculations**	Delete	[p. 708]

Setting up attendance related to student behavior

You can set the system to assign an attendance code to a student when a specific *student behavior action* [*About student behavior* p.89] is recorded for a student; for example, where a student is suspended for three days, PowerSchool SMS can record that student absent for each of those three days.

PowerSchool SMS sets the student's default attendance value to the attendance code assigned to the behavior action. The attendance code applies to periods in a school that collects class attendance, to half days in a school that collects twice-daily attendance, and to full days in a school that collects daily attendance. Where several behavior actions are recorded for a student on the same day and those actions are associated with different attendance codes, PowerSchool SMS assigns an attendance code by referring to the priorities on the Behavior Attendance Action setup list [see p.265]. PowerSchool SMS assigns the attendance code when the system is next able.

You set this up by associating an attendance code [p. 185] with an *student behavior attendance action*, which a District Administrator sets up [p. 265].

To associate an attendance code to a student behavior attendance action [SA[1]]:

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.

---

[1]You can do this if your role is School Administrator.

2 Under **School**, click **General Settings**. The General Settings page appears.

3 Under **Student Behavior Attendance Actions** [*Figure 106*], select an Attendance code for each attendance action.

4 Click **OK**.

Figure 106: Student Behavior Attendance Actions

Selected: 1				Total: 4
☐ Attendance Action		Attendance Code		
☐ Community Service		CSAttCode		▼
☑ Expulsion		EXAttCode		⌄
☐ Suspension		SUAttCode		▼
☐ YEP2-Behavior Attendance Action Description 0		YEPAE		▼
				TOP ➡
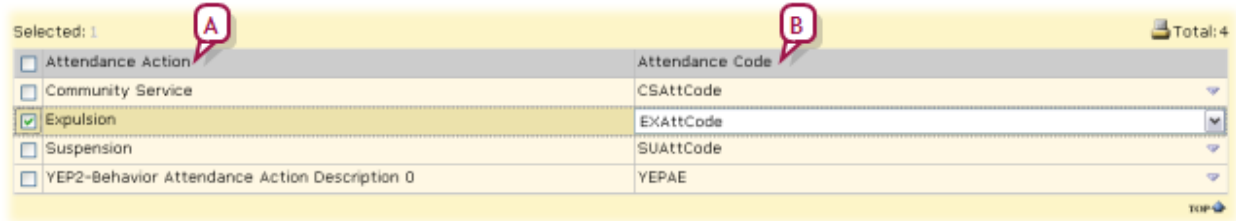
A **Attendance Action**: A student behavior attendance action [p. 265].

B **Attendance Code** [p. 185]

Table 34: Permissions pertaining to attendance related to student behavior

To	You need this permission	Set to	Details
Associate an attendance code with a student behavior attendance action	**School Setup > Attendance General Settings**	Yes	[p. 707]

Grade level setup

The District Administrator specifies the grade levels taught at district schools. A School Administrator chooses from grade levels provided by the district [*Grade level specification* p.200]. While the District Administrator can choose any name for a grade level, typical grade levels include:

- 1 through 20
- K: Kindergarten
- KA: Kindergarten-AM
- KP: Kindergarten-PM
- PE: Pre-enrolled
- PK: Pre-Kindergarten
- N/A: Not available

For example, an elementary School Administrator might choose the following: KA, KP, 1, 2, 3, 4, 5, 6, and PE. A high School Administrator might choose 9, 10, 11, 12, and PE.

To choose the grade levels to use in a school: [SA][1]

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.

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[1]You can do this if you are a School Administrator.

2 Under **School**, click **Grade Levels (setup list)**. The Grade Levels page appears with a list of grade levels available for use in the school.

3 In the **Use** column, select the check boxes of the desired grade levels.

4 Click **OK**.

Grade level specification

Each school must specify the grade levels available at that school. A School Administrator selects grade levels defined for use across the district by a District Administrator [p. 199]. A grade level definition consists of a name and a description; for example, grade level 2 could be named "2", "02", or "Two".

Caution: If the District Administrator removes a grade level [p. 200], information in the Active Calendar could be lost.

Table 35: Permissions pertaining to grade levels

To	You need this permission	Set to	Details
Set grade levels for a school	**School Setup > Grade Level Setup List**	Edit	[p. 720]

Facility setup

In a school you must set up *rooms* [p. 201] in which to schedule classes and assign homerooms [p. 202]. Rooms may also be used for other tasks such as recording the location of student behavior incidents. A room is located in a *building*, which you must set up first [p. 200].

Table 36: Permissions pertaining to rooms

To	You need this permission	Set to	Details
Add, edit, or delete buildings	**Facilities Management > Buildings**	Delete	[p. 668]
Add, edit, or delete rooms	**Facilities Management > Rooms**	Delete	[p. 668]

Building setup

A building can contain one or more rooms. A school can have one or more buildings. A building, and thus some or all of the rooms it contains, may be shared between two or more schools. In a shared building, some rooms may belong to one school while others are shared (for example, a band room or computer lab). Where a room is shared, you can specify when it is available to the school. Each school can give the same shared building a different name.

To set up a building [SA[1]]:

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[1]You can do this if your role is School Administrator.

1   In the **Admin** menu, click **School Setup**. The School Setup
    page appears.
2   Under **School**, click **Buildings and Rooms**. The Buildings page
    appears.
3   In the **Actions** menu click **Add Building...**. The Edit Building
    page appears.
    - To change the properties of an existing building, click the building's
      name or select the building and in the **Actions** menu click **Edit
      Building...**.
4   On the Edit Building page, enter or change Information, which
    includes:
    - **Building no.**: A short name for the building. This is the name
      PowerSchool SMS uses in lists across the system.
    - **Building name**: A meaningful description; for example, "Main
      Building", "Sports Complex".
    - **Contact name**: A person responsible for the use of the building, if
      such a person is designated.
    - **Maximum capacity**: The maximum number of students that the
      building is permitted to hold.
    - **Physical address**: The physical location of the building.
    - **Mailing address**: The mailing address, if it is different than the
      Physical Address.
    - **Communication number**: The telephone, pager, fax, or similar
      number of the main office in the building, of the Contact Name, of
      alternate contacts, or all of these. An email address is also
      acceptable.
5   Click **OK**.

You can delete a building. However, before doing so you must ensure that it
contains no rooms.

To delete an existing building [SA[1]]:

1   Ensure that the building has no rooms.
2   On the Buildings page, select the building.
3   In the **Actions** menu click **Delete Building**.

Room setup

Once you have a building set up in a school, you can add rooms to that
building.

To set up a room:

1   In the **Admin** menu, click **School Setup**. The School Setup
    page appears.
2   Under **School**, click **Buildings and Rooms**. The Buildings page
    appears with a list of buildings.

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[1]You can do this if your role is School Administrator.

3 In the **# Rooms** column, click the number of rooms for the building in which the room is located. The Rooms page appears.

4 In the **Actions** menu click **Add Room...**.
- To change the properties of a room in a building, click the room's name or select the room and in the **Actions** menu click **Edit Room...**.

5 Enter or change Information, which includes:
- **Room no.:** A short name for the room. This is the name PowerSchool SMS uses in lists across the system.
- **Room name**: A meaningful description; for example, "Social Studies Classroom", "Biology Lab".
- **Room type**: Functional description, such as "Classroom", "Gymnasium", "Lecture hall", "Multi-purpose room".
- **Optimal capacity**: The optimal number of students for this room.
- **Maximum capacity**: The maximum number of students this room is permitted to hold.
- **Can be scheduled**: Indicates that this room is available for use by a class in the schedule.
- **Allow (#) concurrent classes**: Where the room can accommodate more than once class at the same time, specifies how many simultaneous classes are possible. Examples of such rooms include a gymnasium, a science lab, a library, and a trades shop.
- **Wheelchair accessible**: Indicates that a student in a wheelchair can get to and use the room.
- **Communication number**: The telephone, pager, fax, or similar number for the room or the main contact person for the room, of alternate contacts, or all of these. An email address is also acceptable.

6 Click **OK**.
- Or, to immediately add another room, click **Save & Add**.

You can delete a room. However, before doing so you must ensure that no class is assigned to it.

To delete a room [SA[1]]:

1 Ensure that no class is assigned to the room.
2 Select the room.
3 In the **Actions** menu click **Delete Room**.

Set up homerooms

[Applies to **elementary** [p. 282] school scheduling and **secondary** [p. 285] school scheduling where that school is set up to take morning and afternoon attendance.]

A School Administrator can adjust the array of homerooms available at a school for enrolling students. Typically, the administrator works with homerooms as part of scheduling [p. 280] the year, editing, deleting, and

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[1]You can do this if your role is School Administrator.

homeroom is associated with one of the rooms set up in a school [*Facility setup* p.200].

Table 37: **Permissions pertaining to homerooms**

To	You need this permission	Set to	Details
Add, edit, or delete homerooms	**School Setup > Homerooms**	Delete	[p. 722]

To set up a homeroom [SA[1]]:

1   In the **Admin** menu, click **School Setup**. The School Setup page appears.
    - Or, click **Scheduling**.
2   Click **Homerooms**. The Homerooms page appears.
3   In the **Actions** menu click **Add Homeroom...**. The Add Homeroom page appears.
    - To change the properties of an existing homeroom, click that room's name (in the **HR** column) or select it and in the **Actions** menu click **Edit Homeroom...**.
    - To delete a homeroom, select it and from the **Actions** menu click **Delete Homeroom**. **Caution**: Only delete a homeroom to which no students or teachers are assigned.
4   On the Add Homeroom page, enter or change Information, which includes:
    - **Homeroom name**: PowerSchool SMS uses this name for the homeroom in lists across the system. Typically a number, such as "6A" or "8C".
    - **Room**: The room to which this homeroom is assigned. You can choose from any one of the rooms set up for this school [*Room setup* p.201].
    - **Capacity**: The maximum number of students allowed in this homeroom.
    - **Teacher**: The teacher(s) assigned to this homeroom. You can choose between one and three staff members set up for this school [*Adding staff* p.230].
    - **Grade**: The grade level(s) of this homeroom. You can choose two or more grades to create a *split class*, for example, Grades 2 and 3 for a Grade 2/3 split class. You can customize the grade levels available for use by schools in the district [p. 200].
    - **Default attendance code**: Indicates the attendance codes that PowerSchool SMS uses by default when it initializes the day [*Setting up school attendance codes* p.185] for present and absent students.
    - **Attendance**: Indicates when attendance for this class is taken (which affects how attendance is calculated). **Note:** Not available if attendance is set to **By Class** on the School Setup > General Settings page.
    - **Scheduling group**: The scheduling group, which enables an administrator to track instructional minutes for this homeroom. **Note**: PowerSchool SMS displays this field only when twice daily attendance and scheduling are set up.

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[1]You can do this if your role is School Administrator.

- **Meeting pattern**: The meeting pattern [p. 356], which enables an administrator to track instructional minutes for this homeroom. **Note**: PowerSchool SMS displays this field only when twice daily attendance and scheduling are set up.
5 Under Constraints, adjust student enrollment constraints [p. 315] as necessary.
- The School Administrator cannot remove **Mandatory constraints**.
6 Click **Save**.
- Or, to immediately create another homeroom, click **Save & Add**.

Grading setup

Setting up a school involves the School Administrator defining standard comments, grading tables and grading periods, and grade items and courses for secondary schools.

A *standard comment* is a re-usable comment that teachers can add to students' progress reports and report cards. A *grading table* [p. 205] defines the format and meaning of the grades that students receive on their report cards. A *grading period* specifies the date range covered by a report card or progress report, and thus is significant to their timing. Typical grading periods are 6-week periods, trimesters, and quarters. Secondary schools use *grade items* to describe the way a school measures student performance; for example, "Semester Grade", "Semester 1 Exam", "Conduct", and "Effort".

Note: This section is incomplete. For complete information on grading setup, refer to the 📕 *Grading Setup Guide*. For information about the field **Withdrawn student/dropped class import grades cutoff:_days**, see "Specifying Grades to be Imported from PowerTeacher" in the *PowerTeacher 2.2.2+ Installation & Setup Guide for Chancery SMS*.

Table 38: **Permissions pertaining to grading**

To	You need this permission	Set to	Details
Specify standard comments	**School Setup > Standard Comments**	Delete	[p. 728]
Create grading tables	**School Setup > Grading Tables**	Delete	[p. 721]
Define grading periods	**School Setup > Grading Period Sets**	Delete	[p. 720]
	School Setup > Define Report Card Periods	Yes	[p. 716]
	School Setup > Define Progress Report Periods	Yes	[p. 715]
Set up report cards and progress reports	**School Setup > Report Card Setup**	Delete	[p. 573]

Note: Where a student gets grades for a grade level at another school that is not supported at her home school, PowerSchool SMS calculates how to best present that grade; for example, if student in grade 8 at her home school of Miller Middle School, but she is taking grade 7 courses at Paradise Elementary School, which does not support grade 8, then PowerSchool SMS would use a grade 7 report card setup.

Creating re-usable comments

A *standard comment* is a sentence or two that teachers can re-use on any report card or progress report. If your school uses many standard comments, create as many categories as you need to group the comments. If teachers at your school typically enter unique, rather than standard, comments set up a *narrative grading table* [p. 212].

To define a standard comment category [SA[1]]:

1 In the **Admin** menu, click **Grading**. The Grading page appears.
2 Under Step 1, click **Standard Comment Categories**. The **Standard Comment Categories** page appears.
3 In the **Actions** menu click **Add Rows**.
   - To edit a category, click in the row and make your changes.
   - To delete a category, select the category and in the **Actions** menu, click **Delete Row**.
4 Enter the category name and a short name of no more than six characters.
   - Make the short name as descriptive as possible because it appears on the **Standard Comments** page as the category description.
5 Click **OK**.
   - Comments are sorted first by category and then by code. Comments that are not categorized appear first.

To create a standard comment [SA[2]]:

1 In the **Admin** menu, click **Grading**. The Grading page appears.
2 Under Step 1, click **Standard Comments**. The **Standard Comments** page appears.
   - To show only the comments for a specific standard comment category, select a **View**.
   - To edit a comment, click in a row and make your changes.
   - To delete a comment, select the comment and in the **Actions** menu, click **Delete.**
3 In the **Actions** menu, click **Add Comments**....
   - To assign the comment to a category, select a **Comment category**.
4 Enter a unique 4-or 5-character code for the comment and then enter the complete comment text as it should appear on the report card.
   - To add more comments, click **Save+Add**.
5 Click **OK**.
6 Set up a Standard Comments grading table [p. 212].

Defining the format and meaning of grades

A *grading table* defines the format and meaning of the grades that students receive on their report cards. The main purpose of a grading table is to list

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[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.

all of the possible grades a student can receive and the meaning of each grade. Grading tables can also identify conversions from one format to another—such as percentages to letters—whether a grade is a pass or a fail and, for secondary schools, the grade points available for numeric, letter, or graphic symbol grades earned in courses of various difficulty levels.

Grading tables appear as a legend on report cards to help readers interpret the grades. Since a report card often includes items with different grading tables, report cards often display multiple grading table legends.

Defining a grading table

You need to create a grading table for each way that your school captures grades. For example, in an elementary school subjects might be graded as a G (Good), S (Satisfactory), or N (Needs Improvement), while conduct or participation are graded using teacher comments. Secondary students might be graded using percentages, while GPAs use grade points on a 4.0 scale. In each of these scenarios, a different type of grading table is required [p. 207].

In addition, you can add special grades, such as "Incomplete" or "Exempt", to all grading table [p. 212].

To define a grading table [SA[1]]:

1   In the **Admin** menu, click **Grading**. The Grading page appears.
2   Under **Step 2**, click **Grading Tables**. The Grading Table page appears.
3   In the **Actions** menu, click **Add Grading Table**.
    •   To adjust an existing grading table, select the grading table and in the **Actions** menu click **Edit Grading Table...**.
    •   To delete a grading table, select the grading table and in the **Actions** menu click **Delete Grading Table**.
4   On the **Edit Grading Table** page, enter or change Information, which includes:
    •   **Grading table name:** The name can be up to 30 characters.
    •   **Short name**: The short name can be an abbreviation of up to six characters. PowerSchool SMS uses this abbreviation on report cards. This abbreviation also appears when you set up course grading properties.
    •   **Description**: A general description of the table and how to use it.
    •   **Type**: Specifies the grading table type [>>]. Refer to the following sections for grading table setup instructions:
        •   *Setting up a letter grade grading table* [p. 207]
        •   *Setting up a numeric grading table* [p. 209]
        •   *Setting up a graphic symbol grading table* [p. 211]
        •   *Setting up a narrative comment or standard comment grading table* [p. 212]

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[1]You can do this if your role is School Administrator.

About grading table types

Grading tables are divided into five different types:

* Letter Grade: Grades entered as letters appear on report cards as letters; for example A, B, C, D, F [p. 207].
* Numeric: Grades entered as numbers are either left as is or PowerSchool SMS converts the grades so that they appear as letter grades or graphic symbols on the report card [p. 209].
* Graphic Symbol: Grades entered as codes will appear on the report card as graphic symbols; for example, "H" for ☺ [p. 211].
* Narrative Comments: Grades are entered as free form text [p. 212].
* Standard Comments: Grades are selected from a list of options [p. 212].

Grading table types correspond to the way teachers enter the grades, not to how the grades appear on the report card. The type you choose depends on the needs of your school [*Table 39*, p.207].

Table 39: **Selecting a grading table type**

If teachers should enter...	Choose this grading table type:
Letter grades (such as A, B, C, D, F or G, S, N) that appear as letter grades on report cards	Letter Grade [p. 207]
Numbers that appear as letter grades on report cards	Numeric. Set **Equivalent grade type** to "Letter Grade" [p. 209].
Numbers, such as percentages, that appear as numbers on report cards	Numeric. Set **Equivalent grade type** to "None" [p. 209].
Numbers that appear as graphic symbols	Numeric. Set **Equivalent grade type** to "Graphic Symbol" [p. 209].
Letters that appear as graphic symbols (such as "H" appears as ☺)	Graphic symbol [p. 211]
Free-form comments	Narrative Comments [p. 212]
Comments by selecting from a pre-defined list	Standard Comments [p. 212]

Setting up a letter grade grading table

Set up a letter grade grading table when your school uses letters to represent a student's grade. Letter grades appear as letters on the report card. You can design letter grades in any format; for example, A, B, C, D, and F, or G, S, and N for Good, Satisfactory, and Needs Improvement.

Note: For secondary schools, if you plan to use calculated grades with a letter grade grading table, you must set up grade points and use a 100-point

GPAs use grade points to determine the value of the letter grade.

To set up a letter grade grading table [SA[1]]:

1 Follow the steps in *Defining a grading table* [p. 206].
2 For **Type**, select "Letter Grade".
3 For **Grading scale**, enter the maximum value of any grade.
   - For example, enter 100 for a 100-point scale or 4 for a 4-point scale.
4 Under **Letter Grade Grading Table**, enter or change Information, which includes:
   - **Level:** For secondary schools only, if your school provides courses with different difficulty levels, such as remedial or honors, links to grading table versions for the other levels appear here. Click a link to add or edit the grading table version.
   - **Letter Grade**: A shortcut key sequence, up to 3 characters, long that staff can use to enter this grade on a report card. For example, "A" enables the staff to press the A key to enter this grade.
   - **Lower Cutoff**: The lowest mark required to earn the grade. The range of marks for this grade start at this value and go to the next highest grade, with the specified grading scale determining the highest possible value [*Figure 107*].
       - The marks you enter in the **Lower Cutoff** column must be of the same format as the scale you entered for **Grading Scale**. For example, if you enter a grading scale of 100, the lower cutoff marks must also be on a 100-point scale.
   - **Grbk % Cutoff:** If grades will be transferred in from a gradebook, the lowest mark (as a percentage) required to earn this grade in PowerSchool SMS. This value can differ from Lower Cutoff.
   - **Grbk % Value**: If your school uses PowerTeacher, enter the percentage represented by the letter grade. For further information, refer to the *PowerTeacher Gradebook Installation and Setup Guide -* PowerSchool SMS, available from *thesupport site*.
   - **Grade Points**: For secondary schools only, the number that represents this grade in calculations, such as GPAs or calculated grades. This value is used in calculations only; it is not displayed on the report card. For example, the grade point equivalent of A is 4.0.
       - If your district offers courses of varying difficulty levels, such as regular, remedial, advanced placement and so on, you can enter different grade points for each level.
   - **P/F**: Indicates that the grade is considered a passing ("P") or failing grade ("F"). For example, if the a subject or course requires 50% to pass, select "F" for all grades under 50%.
   - **% Credit:** The percent of total credit that the student receives for this grade.
   - **Description in Legend:** A description of the grade, up to 15 characters long, which PowerSchool SMS displays in the report card's legend. Ensure the description includes the grade itself. For example,

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[1]You can do this if your role is School Administrator.

"3.0-4.0 - Excellent", "A = 85-100", "I = Incomplete", "D - Poor", and "☺ Good".

5 Click **OK**.

Figure 107: Letter grade grading table

A **Grading scale**: Specifies the highest possible grade.
B **Level**: Click a link to toggle between "Reg" (regular) and other grading table versions.
C **Lower Cutoff**: The range of marks to receive the grade start at the lower cutoff value and go to the next highest grade. In this example, to receive an "A" the student must achieve marks of between 95% and 100%.

Setting up a numeric grading table

Depending on the *equivalent grade type* you choose for the numeric grading table, the grades that PowerSchool SMS displays when the teacher enters marks are either numbers, letters, or graphic symbols on students' report cards [p. 207].

To set up a numeric grading table [SA[1]]:

1 Follow the steps in *Defining a grading table* [p. 206].
2 For **Type**, select "Numeric".
3 Enter or change Information, which includes:
- **Max no. of digits**: The maximum number of digits that teachers can enter.
  - To determine the maximum number of digits, add the **Decimal places** digits to the digits in the upper range of the **Numeric grades input range**. For example, for an input range of 0 to 100 with no decimal places, the max number of digits is 3.
- **Decimal places**: The number of digits that indicate how many of the digits in **Max No. of Digits** will appear to the right of the decimal

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[1]You can do this if your role is School Administrator.

point. For example, if you enter 3 for **Max No. of Digits** and 1 for **Decimal places**, the maximum value possible is 99.9.

- **Numeric grades scale**: The maximum grade a student can receive without bonus points [p. 213]. This number is used as the denominator in all calculations using this grading table.
- **Numeric grades input range**: The minimum grade and maximum grade allowed. For example, 0 to 4.0 or 0 to 100.
  - Use only positive numbers.
  - If teachers enter grades as percentages, use a grading scale of 100 and a numeric grade input range of 0 to 100.
  - If teachers enter grades on a 4-point scales, use a grading scale of 4 and a numeric input range of 0 to 4.
  - If you want to award bonus points [p. 213], make the upper input range greater than 100. For example, 0 to 125.
- **Equivalent grade type**: Determines how grades will display on student report cards.
  - Select **None** to display the numeric grades as numbers.
  - Select **Letter Grade** to display the numeric grades as letters.
  - Select **Graphic Symbol** to display the numeric grades as symbols.
- **Level adjustment factor**: PowerSchool SMS displays this (for secondary schools only) if your district offers courses of varying difficulty levels, such as regular, remedial, advanced placement and so on. Select one of the following:
  - **Add**: To adjust the grade, PowerSchool SMS adds the value entered in the **Level Adjustment** column to the numeric grade.
  - **Multiply**: To adjust the grade, PowerSchool SMS multiplies the value entered in the **Level Adjustment** column by the numeric grade.
  - **Note:** When you select Add or Multiply during the initial setup of the grading table, a **Copy** button appears that enables you to copy the regular level version of the grading table to create a new version for other levels.

4 Under **Numeric Grading Table**, enter or change Information, which includes:
- **Level: For secondary schools only, if your school provides courses with different difficulty levels, such as remedial or honors, links to grading table versions for the other levels appear here. Click a link to add or edit the grading table version.**
- **Lower Cutoff**: The lowest mark required to earn the grade. The range of marks for this grade start at this value and go to the next highest grade, with the specified grading scale determining the highest possible value.
  - The marks you enter in the **Lower Cutoff** column must be of the same format as the scale you entered for **Grading Scale**. For example, if you enter a grading scale of 100, the lower cutoff marks must also be on a 100-point scale.
  - If you are using course leveling, the lower cutoff values can differ between different course level versions of the grading table.
- **Grade Points:** For secondary schools only, the number that represents this grade in calculations, such as GPAs or calculated grades. This

value is used in calculations only; it is not displayed on the report card. For example, the grade point equivalent of A is 4.0.

- **P/F**: Indicates that the grade is considered a passing ("P") or failing grade ("F"). For example, if the a subject or course requires 50% to pass, select "F" for all grades under 50%.
- **% Credit:** The percent of total credit that the student receives for this grade.
- **Description in Legend:** A description of the grade, up to 15 characters long, which PowerSchool SMS displays in the report card's legend. Ensure the description includes the grade itself. For example, "3.0-4.0 - Excellent", "A = 85-100", "I = Incomplete", "D - Poor", and "☺ Good".

5 Click **OK**.

Setting up a graphic symbol grading table

Graphic symbol grading tables allow grades to be entered as letters that PowerSchool SMS converts and displays as graphic symbols on students' report cards.

To set up a graphic symbol grading table [SA[1]]:

1 Follow the steps in *Defining a grading table* [p. 206].
2 For **Type**, select **Graphic Symbol**.
3 For **Grading scale**, enter the maximum value of any grade.
4 Under **Numeric Grading Table**, enter or change Information, which includes:

- **Level:** For secondary schools only, if your school provides courses with different difficulty levels, such as remedial or honors, links to grading table versions for the other levels appear here. Click a link to add or edit the grading table version.
- **Input Grade**: Enter up to 3 characters that staff will use to enter this grade on a report card. For example, enter "H" so that staff can press the H key to enter a happy face symbol.
- **Reporting Grade**: Select how the grade should appear on students' report cards:
  - To display the letter entered in the **Input Grade** column, select "Same".
  - To display a symbol, select "Check Mark", "Happy Face", "Neutral Face", or "Sad Face".
  - To display a blank area, select "Blank Space".
- **Grbk % Cutoff:** If grades will be transferred in from a gradebook, the lowest mark (as a percentage) required to earn this grade in PowerSchool SMS. This value can differ from Lower Cutoff.
- **Grbk % Value:** If your school uses PowerTeacher, enter the percentage represented by the letter grade. For further information, refer to the *PowerTeacher Gradebook Installation and Setup Guide - PowerSchool SMS*, available from https://support.powerschool.com.

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[1]You can do this if your role is School Administrator.

- **Grade Points:** For secondary schools only, the number that represents this grade in calculations, such as GPAs or calculated grades. This value is used in calculations only; it is not displayed on the report card. For example, the grade point equivalent of A is 4.0.
  - If you are applying linear course adjustment factors, this value will be adjusted by the value specified. If you are applying nonlinear course adjustment factors, you can enter different values in this column to reflect the adjusted value for each course level.
- **P/F:** Indicates that the grade is considered a passing ("P") or failing grade ("F").
- **% Credit:** The percent of total credit that the student receives for this grade.
- **Description in Legend:** A description of the grade, up to 15 characters long, which PowerSchool SMS displays in the report card's legend. Ensure the description includes the grade itself. For example, "3.0-4.0 - Excellent", "A = 85-100", "I = Incomplete", and "☺ Good".

5 Click **OK**.

Setting up a narrative comment or standard comment grading table

Enter comments for conduct or participation grades. Narrative comment grades are entered in free form text and appear on the report card as entered. Standard comment grades are selected from a list of pre-defined options and appear on the report card as entered.

To set up a narrative or standard comment grading table: [SA[1]]

1 Follow the steps in *Defining a grading table* [p. 206].
2 For **Type**, select "Narrative Comment" or "Standard Comment".
3 For narrative comments, enter the maximum number of characters allowed on students' report cards and progress reports.
- Or, for standard comments, enter the maximum number of comments allowed on students' report cards and progress reports.
  - If your school requires that teachers must add narrative or standard comments to report cards and progress reports, select "Comments are mandatory". If this option is selected, but a teacher does not enter or select comments, the Missing Grades report displays the comment grades as "Missing".
4 Click **OK**.

Adding special grades to grading tables

To handle special circumstances, such as exemptions, incomplete courses, and grades that are not available, use the Special Grades area at the bottom of numeric, letter, or graphic symbol grading tables. If your district is using course levels for secondary schools, you can only edit special grades for the

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[1]You can do this if your role is School Administrator.

"Regular" course level. However, the special grades themselves apply to courses for all course levels.

To add special grades [SA[1]]:

1 Create a letter grade, numeric, or graphic symbol grading table see *Defining a grading table* [p. 206].
2 Under **Special Grades**, enter or change Information, which includes:

- **Input Grade:** A shortcut key sequence, up to 3 characters, long that staff can use to enter this grade on a report card. For example, "A" enables the staff to press the A key to enter this grade, or I for an incomplete.
- **Reporting Grade**: Select how the grade should appear on students' report cards:
  - To display the letter entered in the **Input Grade** column, select "Same".
  - To display a symbol, select "Check Mark", "Happy Face", "Neutral Face", or "Sad Face".
  - To display a blank area, select "Blank Space".
- **P/F**: Indicates that the grade is considered a passing ("P") or failing grade ("F").
- **% Credit:** The percent of total credit that the student receives for this grade.
- **Description in Legend:** A description of the grade, up to 15 characters long, which PowerSchool SMS displays in the report card's legend. Ensure the description includes the grade itself. For example, "3.0-4.0 - Excellent", "A = 85-100", "I = Incomplete", and "☺ Good".
- **Grade Calculations**: Specifies the action that PowerSchool SMS takes (for a secondary school only) when it encounters special grades in grade calculations:
  - "Ignore grade item": The system removes both the numerator and the denominator from the formula.
  - "Count item as zero": The numerator is counted as zero. The student is penalized for the special grade.
  - "No calculated grade": The calculation cannot be completed.
  - "Treat as missing grade": Allows special grades to be treated differently in different calculations. The grade is treated as a missing grade, and the **Missing Grade** setting for the grade item in the calculated grade formula is applied.

Setting up a grading table to allow bonus points

You can set up numeric grading tables to accommodate awarding bonus points [*Figure 108*]. For secondary schools, this setup allows you to not only manage bonus points but also specify equivalent numeric values or grade points for multiple course levels, so that you can set up your GPA definitions to use the appropriate method of calculating your GPAs.

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[1]You can do this if your role is School Administrator.

To set up a grading table to allow bonus points [SA[1]]:

1 Create a numeric grading table [p. 209].
2 For **Numeric grades input range**, enter a maximum value that is greater than the **Numeric grades scale** value. For example, if you are working with percentages and students are eligible for up to ten bonus points, enter a grading scale of 100 and a numeric grades input range of 0 to 110.
3 Under **Numeric Grading Table**, add a row to accommodate all grades above 100%.
   - Enter a lower cutoff that is higher than the numeric grades scale, for example, 101.
   - Enter the applicable grade points, pass/fail and % credit information, and enter a description.
4 Complete the remainder of the grade table.
5 **Click OK.**

Figure 108: Numeric grading table

*Numeric grades scale: 100
*Numeric grades input range: 0 to 110 — A
Equivalent grade type: None
Level adjustment factor: None

Numeric Grading Table

Define each grade by its lower cutoff, the lowest numeric value required to earn the grade.

Level: **Reg** ADV HON

Copy
Selected: 0

	*Lower Cutoff	*Letter Grade	Grade Points	*Graphic Symbol	P/F	% Credit	*Description in Legend
☐	101		4		P	100	101-110 Excellent
☐	85		3.8		P	100	85-100 Exceeds Expctns
☐	75		3.1		P	100	75-84 Good
☐	65		2.5		P	100	65-74 Satisfactory
☐	55		1.7		P	100	55- 65 Poor

A Grade input allows up to 10 bonus points.
B Lower cutoff is higher than grades scale to accommodate marks above 100.

Awards setup

Where a school gives a standard award to students, you can set up the award in the PowerSchool SMS system. When the award is granted, you can record it and print an award certificate for presentation. For the award certificate,

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[1]You can do this if your role is School Administrator.

PowerSchool SMS provides a standard layout; you can customize the text of the award to correspond to the granting criteria.

In addition to using awards, you can use customized school reports to create award templates. You can then put any field onto a custom award template. For more information about creating customized school reports, see the 📄 *Report Writers Guide* .

Table 40: **Permissions pertaining to student awards**

To	You need this permission	Set to	Details
Set up student awards	**School Setup > Awards Setup**	Delete	[p. 709]

To set up an award [SA[1]]:

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.

2 Under **School**, click **Awards**. The Awards page appears.

3 From the **Actions** menu, click **Add Award....**
- To adjust an existing award, select the award and in the **Actions** menu click **Edit Award....**
- To delete an award, select the award and in the **Actions** menu click **Delete Award**.

4 On the **Add Award** page, enter or change Information, which includes:
- **Award name**: The title that appears at the top of the award certificate. Ensure that the name is short enough to fit on the certificate.
- **Certificate description**: Enter the purpose of the award, which appears on the award certificate. Ensure that the description fits on one line of the certificate.
- **Award criteria**: A general description, for the benefit of administrators, of the criteria a student must meet to receive the award. **Note**: You must explicitly add recipients, using the award criteria as a guide.

5 Click **OK**.

School staff

In a PowerSchool SMS system, each person who works with students is considered *staff* and must have a *staff record*. A staff record holds information such as personal details, status, contacts details, credentials, schools, course and room preferences, time restrictions, and teaching load.

In general, a District or School Administrator sets up staff records [*Adding staff* p.230] which a School Administrator can use in scheduling classes and other activities. A District or School Administrator can view a staff record and maintain the information therein. Once a staff member is assigned to a school, users at that school can view the record and add and change some

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[1]You can do this if your role is School Administrator.

information. These capabilities may vary, subject to permissions for roles and individual users [*Table 49*, p.261].

A District Administrator can view staff records across the district. A School Administrator can view staff records assigned to her school. **Note:** For a system user at a school to view a staff record at that school, that user must have a staff record at that school (and that school is the staff members' home school) and be logged in to the PowerSchool SMS system with a user account for which the role permits the viewing of staff records.

Given the amount of information stored in a staff record, and the purpose for which it is used, PowerSchool SMS provides several different views of a staff record: a Staff Demographics record [p. 220], a staff Schools record, and a Staff Scheduling Properties record [p. 227].

Viewing staff

A staff record contains the staff member's personal details, contact information, and professional statistics. In general, this information is maintained by a District or School Administrator.

To view a staff demographics record [SA, DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click <u>Staff</u>. The Staff Search page appears.
3 Set the **Search in** option to search for staff in a specific school or across the entire district.
4 Click <u>**Display All Records**</u>. A complete list of staff records for your district or specified school appears.
   • PowerSchool SMS displays the first 1000 staff records. If the system holds more than 1000 staff records, search for particular staff records using basic [p. 216] or detailed criteria [p. 217].
   • Or reuse a previously specified search by choosing it from **List**.
5 In the **Staff name** column, click the name of a record. The Edit Staff Demographics page appears [*Staff Demographics record* p.220].
   • To view the staff members Schools record [p. 222], in the control bar click **Schools**.
   • To view the staff member's Staff Scheduling record [p. 227], in the control bar click **Staff Scheduling**.

Searching for staff records using basic criteria

Rather than displaying all staff records available to you, you can search for a limited set of records based on the information stored in up to three staff record fields [*Figure 109*]. For basic criteria you can search on fields containing largely demographic information [p. 220] including home school. For example, you want to locate a female teacher you met at a staff meeting named Eliza or Liz [*Figure 109*].

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[1]You can do this if your role is School Administrator or District Administrator.

To conduct a search for staff records using basic criteria:

1 On the **Staff Search** page [p. 216], click the **Basic** tab.

2 Under **Search by**, for the first criterion [*Figure 109*]:

   a Select the field on which to search.

   b Select an operator.

   c Enter the value to find.

3 Configure up to two more criteria.

4 Click **Search**. PowerSchool SMS displays matching staff records (if any) under **Staff Search Results**.

- PowerSchool SMS saves the search criteria. Should you want to conduct this same search again, select it from **List**.
- In a search for staff at a specific school, the results include staff who have a school record at the searcher's school or the specified school. Staff members who have been assigned the specified school as a Home School, but who do not have a school record at the school, do not appear.
- You can changed the sorting of these results [p. 220] or adjust the columns displayed [p. 218].
- If search matches only one staff member, PowerSchool SMS displays that staff member's record.

Figure 109: Setting basic search criteria

A Criterion
B Field
C Operator
D Value

Searching for staff records using detailed criteria

Rather than displaying all staff records available to you, you can find a more specific set by searching the system for records based on the information stored in a large range of staff record fields. For detailed criteria you can search on fields containing demographic information [p. 220] including home school, scheduling properties [p. 227], as well as any custom data fields unique to your system. For example, you want to identify all mathematics teachers with at least 5 years of experience in the district [*Figure 110*].

To conduct a search for staff records using detailed criteria:

1 On the **Staff Search** page [p. 216], click the **Detail** tab.

2 Add a criterion [*Figure 110*]:

   a For **Category**, select a set of fields. Your choice determines the fields available to search.

   a Select the field on which to search.

   b Select an operator.

    c Enter the value to find.

    d Click **Add Criteria**. The criterion appears in the list of **Search Criteria**.

3 Add more criteria.

- To remove a criterion, click it to select it and click **Remove** [*Figure 110*].

4 For **Match**, click **All Criteria** or **Any Criteria**.

- Select the **Any Criteria** check box to find staff records that match any one of the criteria in the list. This generates more results.
- Select the **All Criteria** check box to find staff records that match all of the criteria in the list. This generates fewer results.

5 Click **Search**. PowerSchool SMS displays matching staff records (if any) under **Staff Search Results**.

- PowerSchool SMS saves the search criteria for the remainder of your session. Should you want to conduct this same search again, select it from **List**.
- You can change the sorting of these results [p. 220] or adjust the columns displayed [p. 218].

Figure 110: Setting detailed search criteria
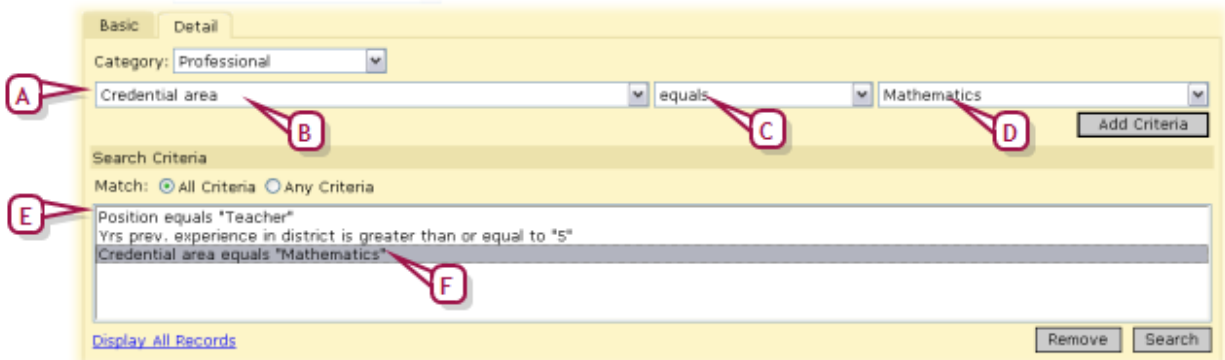
A	Criterion
B	Field
C	Operator
D	Value
E	Search criteria
F	Selected criterion

Adjusting the staff record search results display

When a search of staff records generates a list of results, by default PowerSchool SMS displays 5 columns of information, starting with Staff name [*Figure 111*]. You can change the columns displayed and rearrange them.

Figure 111: Staff record search results: Default columns and sorting

A   Column: Displays information from a staff record field, in this case **Staff name**. The default columns are shown.

B   First sort column: PowerSchool SMS sorts the list of staff records by the values in this column in ascending order [p. 220].

C   Second sort column: After sorting by the first sort column, PowerSchool SMS sorts further by the values in this column [p. 220].

D   Third sort column: After sorting by the first and second sort columns, PowerSchool SMS sorts further by the values in this column [p. 220].

To adjust the columns displayed in staff search results [SA, DA[1]]:

1   On the Staff Search page [p. 216], conduct a search [p. 216] [p. 217]. PowerSchool SMS displays a list under **Staff Search Results**.

2   In the **Edit** menu click **Choose Columns....** The Choose Columns page appears.
- **Selected Columns** are those that are displayed under **Staff Search Results**. The vertical order corresponds to the left-to-right display order.
- **Available Columns** are the fields from which you can choose to form a column.

3   Adjust the columns displayed:
- To remove a field from display, double-click it under **Selected Columns**. PowerSchool SMS moves it to **Available Columns**.
- To remove a field from display, double-click it under **Selected Columns**. PowerSchool SMS moves it to **Available Columns**.

4   Adjust the left-to-right display order of the columns:
- To move a field up (that is, left), click it to select it and click the up arrow button.
- To move a field down (that is, right), click it to select it and click the down arrow button.

5   Click **OK**.
- To return to PowerSchool SMS's default column display settings, click **Restore Defaults**.

---

[1]You can do this if your role is School Administrator or District Administrator.

Sorting the staff record search results display

By default, PowerSchool SMS sorts the search results by the values in the columns **Staff ID** (ascending order), **User ID** (ascending), and **Home school** (ascending). You can change the sorting by one or more columns, in ascending or descending order. For example, you might want to sort the list of staff in ascending order by name, then by gender. For details, refer to *Sorting records* [p. 22]

Staff Demographics record

Your main and initial view of a staff record is of its demographic information. PowerSchool SMS displays this information in a Staff Demographics record, which includes the following information organized under several tabs:

- *Staff Demographics: Overview* [p. 220]
- *Staff Demographics: Address/Phone* [p. 221]
- *Staff Demographics: Professional Info* [p. 221]
- *Staff Demographics: Additional Info* [p. 222]

Note: Some of the fields contain information that is set when staff record is created and cannot be changed thereafter. These fields are marked with a "**!**".

Staff Demographics: Overview

The information fields on the Add/Edit Staff Demographics page include the following:

- **Staff ID**: The staff member's ID number. Typically, the format of this number conforms to a district standard.
- **User**: A staff record must be associated with a user account on the PowerSchool SMS system [p. 236]. **Caution:** Once the user account is chosen and the staff record is saved, the user account cannot be changed.
- **Title**, **Last name**, **First name**, **Middle name**, **Generation**, **Preferred name**: PowerSchool SMS automatically enters this information based on information in the user record, that is, the user account assigned to this staff record. When you create a staff record [p. 230], PowerSchool SMS enters this information when you click **Apply**.
- **Gender**: The staff member's gender, typically Male or Female.
- **Social security #**: The person's Social Security Number (SSN). Access to this number is controlled by the *Access to SSN permission* [p. 751].
- **Birthdate**: The format is MM/DD/YYYY, for example, 06/29/1965.
- **Home school** : The school to which the staff member is primarily posted. The *home school* determines which users can view this staff record. The home school is also significant in other areas of the system such as staff record displays and staff searches [p. 218].

Staff Demographics: Address/Phone

- **Work phone**, **Home phone**, **Email address**: PowerSchool SMS automatically enters this information based on information in the user record, that is, the user account assigned to this staff record. When you create a staff record, PowerSchool SMS enters this information when you click **Apply**.
- **Emergency contact name**: The staff member's emergency contact person.
- **Emergency contact number**: The phone number for the staff member's emergency contact person.
- **Cellular phone**: The staff member's cellular phone number.
- **Physical address**: The staff member's physical address.
- **Mailing address**: The staff member's mailing address.

Staff Demographics: Professional Info

- **License #**: The number of the staff member's teaching license.
- **Licensure check**: Indicates if it is necessary to confirm the teacher's license number, area of certification or specialty, state, and year/date of expiration. A District Administrator can customize the choices using a Staff Setup List [p. 262].
- **Other staff number 1**: An additional staff identification number, if needed.
- **Other staff number 2:** An additional staff identification number, if needed.
- **% of full time status**: The staff member's status as a full-time or part-time employee.
- **Hire date**: The staff member's hire date in MM/DD/YYYY format.
- **Exit date**: The staff member's exit date in MM/DD/YYYY format.
- **Position**: The staff member's current position, such as administrator, teacher, teacher's aide. A District Administrator can customize the choices using a Staff Setup List [p. 262].
- **Instr. services to English learners**: The services this staff member can offer English language learners, such as specialized, normal, and so on. A District Administrator can customize the choices using a Staff Setup List [p. 262].
- **Education level**: The staff member's highest level of education. A District Administrator can customize the choices using a Staff Setup List [p. 262].
- **Year degree earned**: The year the staff member's most recent degree was granted in YYYY format.
- **Yrs prev. experience in district**: The number of years of experience the staff member has in this district prior to the most recent hire date; for example, if a teacher worked for the district in the 2001–2002 and 2005–2006 school years, then left and came back in 2007 and is still working for the district, the value for this field would be two.

- **Yrs experience outside district**: The number of years of experience the staff member has outside of this district.
- **Credentials**: The staff member's record of academic achievements. Records the credential area, type, date earned, and date expired. Click **Add Row** to add an achievement. A District Administrator can customize the choices for Type and Area using a Staff Setup List [p. 262].

Staff Demographics: Additional Info

- **Federal ethnic category**: The staff member's Federal Ethic Category. The categories are provided.
- **Federal race categories**: The staff member's race categories. Choose one or more categories by moving it from the **Available Items** list to the **Selected Categories** list.
- **Previous social security #**, **Previous license number**, **Previous last name**, **Previous first name**, **Previous middle name**: The staff member's previous number or name, if he or she had one.

Staff Schools record

When a District Administrator assigns a staff member to a school, a *school record* is created for the staff member at that school. A user must have a staff record containing a school record in order to sign in to a PowerSchool SMS system and view information for a school.

Since one staff member can provide services to more than one school in the district, a District Administrator can give a staff member a *school assignment* [p. 224] at one or more schools; a School Administrator can give a staff member at his or her school assignment at a school in the district. A school assignment contains information about the type of work a staff member performs at a particular school, such as teaching English and Math or counseling. PowerSchool SMS stores all school assignments at a particular school with a *school record* [*Figure 112*]. A staff member may also provide services to the district, that is, services not associated with just one school; to record this information you can give a staff member one or more *district staff assignments* [p. 226].

Figure 112: Schools list

A District staff assignment [p. 226]
B School record
C School assignment

School records

You can view school records on the Schools list page [*Figure 112*].

To view or change a school record [SA, DA[1]]:

1 Locate and view a staff record [p. 216]. The Edit Staff
   Demographics page appears.
2 In the control bar, click **Schools**. The Schools List page appears
   [*Figure 112*].
   - One or more school assignments are listed under each school.
   - This page displays only active schools, that is, school records for
     which the end date is a current or future date; other school records
     are considered inactive. To view inactive school records, in the **Edit**
     menu click **Show Inactive Schools**.
3 Click the name of a school. The Edit School page appears.
4 Enter or change Information, which includes:
   - **School**: The school at which the assignment is located. Once the
     school record is saved, this school cannot be changed (the "!" symbol
     indicates this).
   - **Start date**: The start date for the assignment in MM/DD/YYYY format.
   - **End date**: The end date of the assignment in MM/DD/YYYY format. An
     end date is optional.
   - **Staff status**: The staff member's work time status at the school, such
     as full-time or part-time. A District Administrator can customize the
     choices using a Staff Setup List [p. 262].
   - **Disciplinary action administrator**: Indicate that a staff member is a
     disciplinary action administrator at the school. This means that the
     staff member appears in the **Responsible person** list on the Behavior
     Incident > Add/Edit Action page.
   - **Staff departments**: Selected Departments lists the departments to
     which this staff member can be assigned. To add a department to the
     list, double-click the department in the Available Departments list. To
     remove a department from the Selected Departments list, double-click
     it.
5 Click **OK**. PowerSchool SMS saves the school record and displays
   it on the Schools list page.

We recommend that you maintain only one school record for all of a staff
member's assignments at that school, even if the staff member was assigned
to that school in several different years. Note: If a staff member has more
than one school record for the same school, on the Schools List page each
staff assignment for that school will appear under each instance of the
school record. If your district requires school records to start and end each
year, on the Schools List page, you can hide school records that have an end
date in the past. Note: If your district uses Active Directory to create
consolidated user accounts, a school record is automatically created based
on the user role and scope. For more information, see the *Directory
Integrator Guide*.

---

[1]You can do this if your role is School Administrator or District Administrator.

To add a school record:

1 Locate and view a staff record [p. 216]. The Edit Staff Demographics page appears.
2 In the control bar, click **Schools**. The Schools List page appears.
3 From the **Actions** menu, click **Add School**. The Add School page appears.
4 Set options.
5 Click **OK**. PowerSchool SMS saves the school record and displays it on the Schools list page.

A District Administrator can delete a staff member's school record. When this is done, the staff member is no longer available to users at that school. However, the staff member's staff record is still available to district users. PowerSchool SMS also retains but does not display the staff member's school assignments at the school. If you set up a new school record for the school, PowerSchool SMS displays all the staff member's school assignments at that school. PowerSchool SMS does not retain the staff member's scheduling preferences, staff department, and program management staff assignments at the school. Also, PowerSchool SMS removes the staff member from any student behavior incidents at the school with which they were associated.

To delete a school record: [DA[1]]

- Note: Before you can delete a staff member's school record, you must re-assign that staff member's classes, homerooms, and resource assignments at that school.
1 Locate and view a staff record [p. 216]. The Edit Staff Demographics page appears.
2 In the control bar, click **Schools**. The Schools List page appears.
3 From the **Actions** menu, click **Delete School**. PowerSchool SMS deletes the school record.
    - After you delete a school record and before running extracts, run data mapping [p. 167] to update the database for extracts.

School assignments

You can view school assignments on the Schools list page [*Figure 112*]. Each school record may have one or more school assignments.

To view or change a school assignment [SA, DA[2]]:

1 Locate and view a staff record [p. 216]. The Edit Staff Demographics page appears.
2 In the control bar, click **Schools**. The Schools List page appears.
3 Click an assignment [*Figure 112*]. The Edit Assignment page appears.

---

[1]You can do this if your role is District Administrator.
[2]You can do this if your role is School Administrator or District Administrator.

4   Enter or change Information, which includes:
- **School**: Matches the school record. This is set at the time the assignment was created and cannot be changed.
- **Start date: The date on which the assignment is to start.**
- **End date**: The date on which the assignment is to end.
- **Job classification: The primary type of work involved in this assignment. A District Administrator can customize the choices using a Staff Setup List [p. 262].**
- **Staff assignment**: One position. A District Administrator can customize the choices using a Staff Setup List [p. 262]. To assign a staff member to more than one position, add a separate school assignment for each position.
- **FTE**: The percentage of full-time equivalency.
- **Language of instruction: The primary language the staff member will use to communicated with the students.**
- **Teacher funds**: Indicates the staff member's eligibility for teacher funds. A District Administrator can customize the choices using a Staff Setup List [p. 262].
- **Instr. type to Eng. learners**: The type of instruction this staff member offers English language learners. A District Administrator can customize the choices using a Staff Setup List [p. 262].

5   Click **OK**. PowerSchool SMS saves the assignment and displays it on the Schools List page.

A staff member may be assigned to a school at several different periods during their employment in the district. Each such period should be entered as a separate school assignment under the relevant school record. Also, where you need to assign a staff member to more than one position, add an assignment for each position.

To add a school assignment: [SA, DA[1]]

1   Locate and view a staff record [p. 216]. The Edit Staff Demographics page appears.

2   In the control bar, click **Schools**. The Schools List page appears.

3   Click **Add Assignment** [*Figure 112*]. The Add Assignment page appears.

4   Set options.

5   Click **OK**. PowerSchool SMS saves the assignment and displays it on the Schools List page.

To delete a school assignment: [DA[2]]

1   Locate and view a staff record [p. 216]. The Edit Staff Demographics page appears.

2   In the control bar, click **Schools**. The Schools List page appears.

3   Select the school assignment.

---

[1]You can do this if your role is School Administrator or District Administrator.
[2]You can do this if your role is District Administrator.

4 In the **Actions** menu click **Delete School Assignment**.
PowerSchool SMS deletes the assignment and adjusts the Schools
List page accordingly.

District staff assignments

You can view district staff assignments on the Schools list page [*Figure 112*].

To view or change a district staff assignment: [SA, DA1]

1 Locate and view a staff record [p. 216]. The Edit Staff
Demographics page appears.
2 In the control bar, click **Schools**. The Schools List page
appears.
3 Under **District Staff Assignment**, click an assignment [*Figure
112*]. The Edit Assignment page appears.
4 Enter or change Information, which includes:
- **Start date: The date on which the assignment is to start.**
- **End date**: The date on which the assignment is to end.
- **Job classification: The primary type of work involved in this
assignment. A District Administrator can customize the choices
using a Staff Setup List [p. 262].**
- **Staff assignment**: One position. A District Administrator can
customize the choices using a Staff Setup List [p. 262].To assign a
staff member to more than one position, add a separate school
assignment for each position.
- **FTE**: The percentage of full-time equivalency.
- **Language of instruction**
- **Teacher funds**: Indicates the staff member's eligibility for teacher
funds. A District Administrator can customize the choices using a Staff
Setup List [p. 262].
- **Instr. type to Eng. learners**: The type of instruction this staff
member provides to English language learners. A District Administrator
can customize the choices using a Staff Setup List [p. 262].
5 Click **OK**. PowerSchool SMS saves any changes to the
assignment and displays it on the Schools List page.

A staff member may be assigned to duties at the district level at several
different periods during their employment in the district. Each such period
should be entered as a separate district staff assignment.

To add a district staff assignment [SA, DA2]:

1 Locate and view a staff record [p. 216]. The Edit Staff
Demographics page appears.
2 In the control bar, click **Schools**. The Schools List page
appears.
3 From the **Actions** menu, click **Add District Staff Assignment**.
The Add School page appears.
- Or under **District Staff Assignment**, click **Add Assignment**.

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[1]You can do this if your role is School Administrator or District Administrator.
[2]You can do this if your role is School Administrator or District Administrator.

4 Set options.

5 Click **OK**. PowerSchool SMS saves the assignment and displays it on the Schools List page.

To delete a district staff assignment: [DA¹]

1 View a staff record [p. 216].

2 In the control bar, click **Schools**. The Schools List page appears.

3 Select the district staff assignment.

4 In the **Actions** menu click **Delete District Assignment**. PowerSchool SMS deletes the assignment and adjusts the Schools List page accordingly.

Staff Scheduling Properties record

This view of a staff record is for use by schools that employ secondary scheduling [p. 280]. The record contains preferences about the staff member's full-time teaching loads and maximum numbers of students [*Figure 113*]. Since these preferences apply district-wide, a District Administrator sets this information. Thereafter, a School Administrator can adjust the values as required to facilitate automatic scheduling.

Figure 113: Staff Scheduling Properties

The record also contains preferences regarding courses, rooms, and time restrictions. Since these preferences apply to a school, a School Administrator sets this information. **Note**: Scheduling preferences apply only to teachers, not to administrators, secretaries, and teachers on leave-of-absence. **Note**: The PowerSchool SMS Master Schedule Builder schedules a teacher based on her course preferences. A teacher with no course preferences is not scheduled automatically (but a School Administrator can do so manually).

To set scheduling defaults [SA²]:

1 Locate and view a staff record [p. 216]. The Edit Staff Demographics page appears.

2 In the control bar, click **Staff Scheduling**. The Staff Scheduling Properties page appears.

3 Enter or change Information, which includes:

- **Scheduling Load**: A load expressed in terms of hours per day. Select **District default (5.0000)** or **Override**, for which you can type a number of hours. **Note**: PowerSchool SMS does not accept zero. **Note**:

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¹You can do this if your role is District Administrator.
²You can do this if your role is School Administrator.

A course scheduling load is a value that reflects the number of hours of instruction for that course. For example, the District Administrator could set a course's scheduling load at 1.0 where that course that meet six hours a week over one term, and to 0.5 for a course that meets three hours a week for one term. Thus, a teacher with a scheduling load of 4.0 could teach two 1.0 courses and four 0.5 courses.

4   Set **Course Preferences**:

    a   Under **Course Search**, find one or more courses using **Basic** or **Detailed** search [p. 40].

- Or, for Course number, enter the number of one or more courses. Separate each number with a comma.

    b   Under **Search results**, select one or more courses.

    c   Click **Add** to add the selected courses to the **Preferred Courses** list.

    d   For each course, under **Preference**, select a preference level.

- The default level is 5 on a scale of 1 to 9 (where 1 is the most preference). Since the Master Schedule Builder does not automatically schedule a course with a preference of 9, the administrator can set this level for a course that she intends to schedule manually.

5   Set **Room Preferences**:

    a   Move one or more rooms from the **Available Rooms** list to the **Selected Rooms** list.

    b   In the **Selected Rooms** list, use the up and down arrows to adjust the order of the rooms in the list. A room higher in the list takes priority over a room lower in the list.

6   Set **Time Restrictions**:

- **Teacher is available at all times**: Indicate that the teacher is available for scheduling during all regular school hours
- **Teacher is not available at the following times**: Indicate that the teacher is not available for scheduling on specific days of the week or at specific times of day. **Caution**: At a school that employs relative days [p. 180], do not set teacher time restrictions.
  - For **Full day Restrictions**, select one or more days of the week.
  - To set **Time-of-day restrictions**: In the Actions menu, click **Add Time Restriction** and set the **Day**, **Start Time**, and **End Time**.

7   Click **Save**.

Or [DA[1]]

1   In the **Admin** menu, click **District Setup**. The District Setup page appears.

2   Under **District**, click <u>**District Calendar**</u>. The District Calendar page appears with a list of calendars.

- The calendar are classified by **Type**: "Historical" (typically, several instances), "Active" (one only), or "Planning" (one only).

---

[1]You can do this if your role is District Administrator.

3 In the **Work with** column, select the "Planning" calendar's check box and click **OK**. The Planning Calendar's District Setup page appears [*Figure 97*].

4 Under **District**, click <u>Next Year Preparation</u>. The Next Year Preparation page appears.

5 Under **Step 1**, click **Staff Scheduling Defaults**.

6 Set options.

7 Click **OK**.

Staff placeholder

To take into account a staff member that the school expects to bring in for the next school year, the School Administrator can create a *placeholder* in the Planning Calendar. Using one or more placeholders, the School Administrator can schedule courses before hiring is not complete.

To create a staff placeholder [SA[1]]:

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

2 Click **Staff Setup**. The Scheduling Staff List appears.

3 From the **Actions** menu, select **Create Placeholder...**. The Staff Scheduling Properties page appears.

4 Enter a **Name**.
- Enter a one-word name. PowerSchool SMS uses this as a last name for search purposes.

5 For **Department**, move one or more departments to the **Selected departments** list.

6 Set **Teaching Load**, **Course Preferences**, **Room Preferences**, and **Time Restrictions** as for any other staff member [p. 227].

7 Click **OK**.

When necessary, such as when a staff member is hired, the School Administrator can convert a placeholder, that is transfer all of that placeholder's scheduling properties to a staff record. When the conversion is complete, PowerSchool SMS deletes the placeholder record.

To convert a staff placeholder [SA[2]]:

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

2 Click **Staff Setup**. The Scheduling Staff List appears.

3 Click <u>All Placeholders</u> and locate the placeholder under Staff Search Results.
- Or click <u>All Staff</u> and locate the placeholder under Staff Search Results.

4 Select the placeholder.

5 From the **Actions** menu, select **Convert Placeholder...**. The Convert <placeholder name> to Staff Member page appears.

---

[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.

6 Search for a staff member.
  - Or, click **All Staff**.
7 Under Staff Search Results, select the staff member.
8 Click **OK**.

Adding staff

For a District or School Administrator to set up a staff record for a person, that person must have a user account [p. 236] on the PowerSchool SMS system.

To create a staff record [SA, DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click **Staff**. The Staff Search page appears.
3 From the **Actions** menu, click **Add Staff**. The Add Staff Demographics page appears.
4 Enter demographic information see *Staff Demographics record* [p. 220].
  - **Note**: If you are a School Administrator, assign the staff member to your school before you close the staff record.
  - **Note:**Some of the fields contain information that is set when staff record is created and cannot be changed thereafter. These fields are marked with a "**!**".
5 Click **Apply**. PowerSchool SMS creates the staff record.
  - PowerSchool SMS places information in some fields (such as **Last name**) based on your choices in others (such as **User**).
  - If you have assigned the staff member to a school, a link to the staff member's **Schools** record [p. 222] appears in the control bar.
6 Click **OK**.

Removing staff

When you delete a staff record, PowerSchool SMS deletes all aspects of the record from the system, including scheduling preferences, staff department, and staff assignments. The staff record is also removed from any associated student behavior incidents, although the incident record is not deleted. Thus, before deleting a staff record, we recommend that you re-assign the staff member's homeroom, class, and resource teacher assignments.

To delete a staff record:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Click **Staff**.
3 Search for and select the staff record.
4 From the **Actions** menu, click **Delete Staff**.
5 Click **OK**.

---

[1]You can do this if your role is School Administrator or District Administrator.

Online course request setup

Using Pearson's parent/student portal, *ParentCONNECTxp™*, a student can request particular courses for her schedule, and a parent can approve that *online course requests* [p. 109], if such approval is required. These requests are transferred to PowerSchool SMS, in which a counselor can review a student's course requests and, on a system where approval is required, approve or reject each request [p. 108].

Note: For online course requesting, ParentCONNECTxp 4.0 [p. 167] or later and PowerSchool SMS 7.7 or later are required.

The District Administrator and the School Administrator are both involved in setting up online course requests for a school.

District Administrator tasks:

- Give a school's School Administrator permission to enable and configure online course requests for her school [*Table 41*, p.232].
- Allow prerequisites to be scheduled in the same year: In the Course Catalog, on the Course Scheduling page [p. 280], ensure that **Allow prerequisites in the same year** is selected. This is particularly useful in a school on a semester system; for example, where a student can take Math 10 in the second semester and its prerequisite, Math 9, in the first.

School Administrator tasks:

- Ensure that academic plans [p. 100] are in use in the school

  Note: If academic plans are not in use, ensure that for the teacher and counselor roles, the *Student Academic Plan permission* [p. 621] is set to Edit or Delete.

  We highly recommend the use of academic plans to support online course requests. PowerSchool SMS uses the academic plan assigned to a student to filter the list of courses available to request and to provide the *Student Academic Plan Progress Report* [p.547] to ParentCONNECTxp.

- For the school, enable online course requests [p. 232].
- For the school, configure each grade level for online course requests [p. 232]
- [Optional] Require counselor approval to publish online course requests [p. 231].
- Provide the school's parents and students with access to the school's ParentCONNECTxp web site. Refer to the *ParentCONNECTxp Administrator's Guide* 📄.

  Notes: If necessary, the administrator can configure ParentCONNECTxp in such a way as to restrict students and parents to working only with course requests. Since on a ParentCONNECTxp web site, the online course request section is at the URL "https://[SchoolName] ParentCONNECTxp/OCR", the administrator can create direct links to it from other school sites.

To	You need this permission	Set to	Details
To enable and configure online course requests for a school.	School Setup > Online Course Request Setup	**Delete**	[p. 723]

Enabling online course requests

The School Administrator has the option to enable students to submit course requests via ParentCONNECTxp. Once the administrator enables students to submit requests, she has the option of requiring counselor and/or parent approval for those requests. Caution: The administrator cannot change these options if an online course request submission period is active (that is, the current date is a date falling between the Availability date and the Submission end date for any grade level [*Figure 114*]).

To enable online course requests: [SA][1]

1 In the Planning Calendar [p. 172], in the **Admin** menu, click **School Setup**. The School Setup page appears.
2 Click **Online Course Request Setup**. The Online Course Setup page appears [*Figure 114*].
3 Select **Allow students to use the Online Course Request System**.
4 Set options according to the school's policy:
   - **Counselor approval required**: A counselor must approve [p. 109] a student's course requests before PowerSchool SMS publishes them to that student's planning schedule [p. 303].
   - **Guardian/parent approval required**: A parent or guardian must approve a student's course request before ParentCONNECTxp transfers it to PowerSchool SMS.
5 Click **Apply** or **OK**.

Configuring a grade level for online course requests

Once the school administrator has enabled online course requests for a school [p. 232], he can decide which grade levels to include and configure each separately. Note: PowerSchool SMS excludes all grade levels when a District Administrator creates a District Planning Calendar.

To configure a grade level for online course requests: [SA][2]

1 In the Planning Calendar [p. 172], in the **Admin** menu, click **School Setup**. The School Setup page appears.
2 Click **Online Course Request Setup**. The Online Course Setup page appears [*Figure 114*].
3 Under Grade Level Settings, for the grade level, set options, which include:

---

[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.

- **Grade level**: The projected grade level [p. 436] for students currently enrolled (in the Active Calendar), that is, the grade level into which the student is expected to advance in the next year.
- **Include**: Determines if courses in this grade level are subject to student requests.
- **Availability date** and **Submission end date** define the period, or *submission window*, during which a student in the grade level can enter his course requests.
  - The dates must fall within the active calendar.
  - Teachers and counselors must make all their course recommendations [p. 110] before this date.
- **Allow override of teacher recommendations**: Determines if a student can override a teacher or counselor's recommendation [p. 110] for a required or elective course.
- **Allow override of counselor recommendations**: Determines if a student can override a counselor's recommendation [p. 110] for a required or elective course.
- **Scheduling Load**: The minimum and maximum scheduling load for a student expressed in terms of hours per day (between 0.01 and 99.99).
- **Allow alternate for required course**: Determines if a student can select an alternate to a required course.
- **Maximum alternates for electives**: Defines the number of alternates to elective courses that a student can request (between 0 and 99).
- **Maximum study halls**: This field defines the number of *study halls* (typically a period of self-directed study) that a student can select for the year. Valid values are 0–99. A study hall selected as an alternate course does not count against this maximum.
- **Allow active & completed courses**: Determines if a student can request a course for which she has received prior credit or in which she is currently enrolled. This is particularly useful in a school on a semester system.
- **Grade level instructions**: Enables the administrator to write instructions for students projected to enter this grade level; for example, "In Grade 9, the student must take one Math course, one Social Studies, and English". ParentCONNECTxp displays these instructions on the Online Course Request web site and in the Course Plan area. Click the icon to enter instructions up to 4000 characters in length. Where instructions are recorded, the icon appears darker than otherwise. Note: ParentCONNECTxp displays the instructions as plain text; HTML formatting tags have no effect.
- **Online course catalog link**: Enables the administrator to enter a link to the school's online course catalog. This link is displayed on the Online Course Request web site. Click the icon to enter a URL; use **Test** to open the URL in a web browser.

4 Click **Apply** or **OK**.

Grade level	Include	*Availability date (mm/dd/yyyy)	*Submission end date (mm/dd/yyyy)	Allow override of teacher recommendations		Allow override of counselor recommendations		Scheduling load		Allow alternate for required course	Maximum alternates for electives	Maximum study halls	Allow active & completed courses	Grade level instructions	Online course catalog link
				Required	Elective	Required	Elective	*Min	*Max						
9	✔	11/01/2011	02/01/2012	☐	☐	☐	☐	1	11	☐	0	0	✔	🗐	🗐
10	✔	12/01/2011	03/01/2012	☐	☐	☐	☐	2	20	✔	2	0	✔	🗐	🗐
11	✔	01/01/2012	02/01/2012	☐	✔	☐	✔	5	20	✔	2	1	✔	🗐	🗐
12	✔	01/15/2012	03/01/2012	✔	☐	✔	☐	3	20	✔	3	2	✔	🗐	🗐

A **Availability date**: If this date is current or past, PowerSchool SMS locks the fields in that particular grade level row. This date is the start of the student *submission window*. **Note**: PowerSchool SMS displays in green any change the administrator makes to this grid until he saves the page.

Requiring counselor approval to publish online course requests

When the School Administrator has set the **Counselor approval required** option for a school [p. 232] and a student submits a course request, PowerSchool SMS flags the request as waiting for counselor and publishes it to the student's planning schedule. The administrator has the option of having PowerSchool SMS wait to publish the course requests until a counselor approves the request [p. 109]. The administrator can do this for each grade level. **Caution**: When the administrator sets this option for a grade level, PowerSchool SMS locks that grade level's row on the Online Course Request Setup page [*Figure 114*].

To force approval of course requests for a grade level: [SA][1]

1 In ParentCONNECTxp's Administration Application (*Admin App*), ensure that the pending course requests have been pushed to the school's PowerSchool SMS system (refer to *the School Maintenance* screen).
2 In PowerSchool SMS, in the Planning Calendar [p. 172], in the **Admin** menu, click **School Setup**. The School Setup page appears.
3 Click **Force Request Approval**. The Force Course Request Approval page appears [*Figure 115*].
4 Under **Grade Level**, select the grade level for which to force approvals.
5 In the **Actions** menu, select **Force Course Request Approval**.

---

[1]You can do this if your role is School Administrator.

Figure 115: Force Course Request Approval page

	Grade level	Grade level closed	OCR submission end date	Grade level status	Status	Students to approve
Selected: 0						Total: 4
☐	9	Yes	03/14/2011	Closed	Completed	0
☐	10	Yes	03/14/2011	Open	Not run	95
☐	11	No	03/21/2011	Open	Not run	105
☐	12	No	03/28/2011	Open	Not run	100

User setup

Setting up and managing system users involves managing user accounts [p. 236], adjusting roles and permissions [p. 240], and controlling access to specialized features such as reports [p. 250]. Some of these tasks fall to the school and others to the District Administrator.

User accounts

For a person to have access to a school's PowerSchool SMS system, that person must have a user account on the system. A user account consists of a user ID, matching password, and one or more associated roles [p. 240]. For a user account to operate, it must also have an associated staff record [p. 215].

Typically, each person has one user account. Since one user account can have more than one role, the user can switch between the roles within the account depending on the task at hand [p. 12]. At a school, we recommend that every staff member have a user account.

Note: If your district uses Active Directory, refer to the *Directory Integrator Guide* for more information about working with roles, accounts, and staff records.

By default, a School Administrator can view the configuration of user accounts; a District Administrator can set up and adjust a user account [p. 236].

To view a user account [SA, DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Users and Security**, click <u>Accounts</u>. The Accounts page appears [*Figure 116*].
3 Search for user accounts using **Last name** and/or **First name** and the **Search** button. PowerSchool SMS displays matching user accounts on the page.
   - This page displays all user accounts the scope of which include the school.

---

[1]You can do this if your role is School Administrator or District Administrator.
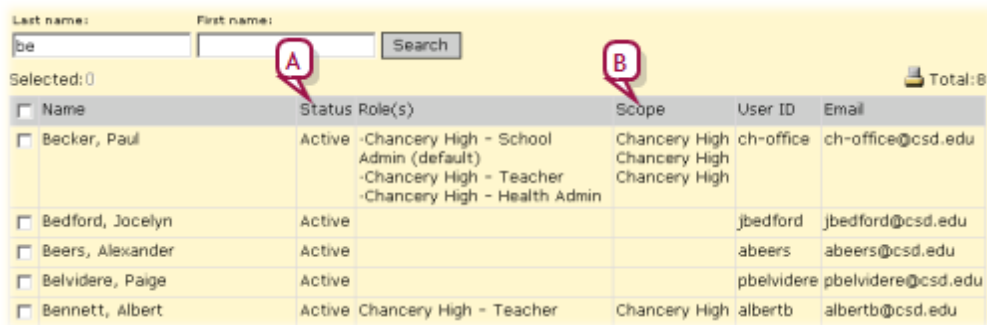
A **Role(s)**: [p. 240]
B **Scope**: [p. 240]

Table 42: **Permissions pertaining to user account viewing**

To	You need this permission	Set to	Details
View user account information such as User ID	**Users > User Accounts**	View	[p. 805]

Setting up user accounts

Typically, a District Administrator can change, delete, and add user accounts. The District Administrator also has the option of rendering a user account temporarily inactive [p. 236], which prevents the user from using the system but maintains the account.

Note: If your system employs a directory service, you can use it to add or delete users. Your district may also have configured the directory service so that it controls the following settings: First Name, Middle Name, Last Name, Email Address, Home Phone Number, and Work Phone Number.

Within an account, you can adjust the account name, contact information, password, and the roles assigned. **Note**: An inactive role does not receive alerts to which that role is subscribed [p. 34].

An administrator can deactivate a role across the system [p. 242]. You can add or remove roles from a user account.

To edit a user account [DA[1]]:
1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Users and Security**, click **Accounts**. The Accounts page appears [*Figure 117*].
  • To create a new user account, click **Add**.
3 For scope, choose a list of user accounts to display. Choices include all users on the system, district users only, users at all schools, or all users at specific schools.
  • Or search for user accounts based on last and/or first name.

---

[1]You can do this if your role is District Administrator.

4 In the **Name** column, click a user account name. The Edit User page appears [*Figure 118*].

- To delete a user account, select the user and in the **Actions** menu click **Delete User**. Note: You can only delete a user account for which there are no roles assigned.

5 Under **General**, enter or change information [*Figure 118*].

6 Under **Roles**, view the roles [p. 240] assigned to this account [*Figure 119*].

7 Click **OK**.

Figure 117: Accounts page

A **Status**: Indicates that the account is active.

Figure 118: Edit User page

A **Account is active**: Indicates that the account is active. To change this, click **Deactivate**.

B **User ID**: The ID the user enters to log in to this account.

C **Password**: The case-sensitive password the user enters to log in to this account. The user can change this password [see p.10]. The password must contain at least one special character.

D **Mobile Service Provider**: Identifies the service provider that facilitates mobile alerts [p. 263], such as T-Mobile or Verizon.

E **Deactivate/Activate**: If the account is active, this deactivates it. If the account is inactive, this activates it. When an account is inactive, the user does not receive alerts [p. 33].

Figure 119: Edit User page: Roles

A **Active:** Select the check boxes of the roles to which the user account should have access. Clear the check box(es) to remove access temporarily.

Table 43: Permissions pertaining to user account editing

To	You need this permission	Set to	Details
Change user settings such as User ID and password	**Users > User Accounts**	Edit	[p. 805]
Add, change, and delete users	**Users > User Accounts**	Delete	[p. 805]

Administrative user account

By default, a PowerSchool SMS system starts with one user account: *Admin*. The Admin account has complete access to all aspects of the system, that is, district-wide scope [p. 240] and all permissions [p. 246]. Typically only a District Administrator has access to an administrative user account.

In a system in which automatic email notification is active, the email address in the Administrator account automatically receives email about important events such as replication failures. The Administrator email address is also used as the originating address for all email notices that are automatically sent to school staff. To have messages sent to more than one address, set up an email distribution group, and enter the group's email address in the Administrator account's Email field.

A system user cannot delete the Admin account or change its permissions. However, the District Administrator can change the Admin account's password or reset it. The initial password for the Admin account is "admin". **Caution**: Given the power of the Admin account, we recommend keeping strict control over access to it.

To reset the Admin user account's Password to "changeme" [DA[1]]:

- **Caution**: Use caution when working directly with the database using SQL.

---

[1]You can do this if your role is District Administrator.

In a SQL management tool on the PowerSchool SMS Database Server, run the following SQL statement:

```
UPDATE CSL_SMS_USER SET
PASSWORD='A0E1A878339656B1D205F059A7DCB3E3'
where LOGIN_ID='Admin'
```

- SQL management tools include Query Analyzer and SQL Server Management Studio.

Roles

A user's *role* consists of the scope of information available to that user account [p. 236] and permissions [p. 246] that give the user access to information and to actions, such as changing information or configuring how it is stored [see also *Understanding your role* p.12]. A role is derived from one of a few standard types or *base roles* [p. 246].

Figure 120: Roles page

A   **Active Role** [p. 12]
B   **Base Role** [p. 246]
C   **Scope** [p. 240]
D   **Permissions** [p. 246]

Role scope

A role's [p. 240] scope determines the information to which the user has access. Scope is either district-wide or for a specific school in the district as follows:

- *District*: Enables the user to view information on all students in the district. Gives the user access to district-related pages, such as the District Course Catalog, and additional options on the District Setup page, such as Setup Lists.

- *School*: Enables the user to view information about students in one specified district school. Gives the user access to school-related pages, including Attendance, school Reports, Awards, School Setup, Scheduling, and Grading. When setting a role's scope to School, the District Administrator must select the specific school to which that role has access.

Roles example

In a typical district, user accounts might be based on the following [*Figure 121*]:

- Six base roles [p. 246]
- Several roles at each school (adding up to dozens of roles in the district)
- One user account for each staff member (adding up to hundreds of accounts for each district).
- Several roles per user account; for example, a Teacher who is also a School Administrator, a Teacher who teaches at two schools, a School Administrator who needs to work with district data, a District Administrator who needs to work with the school data in every school, a School Secretary who works at more than one school.

Base Roles | **Roles** | **Users**
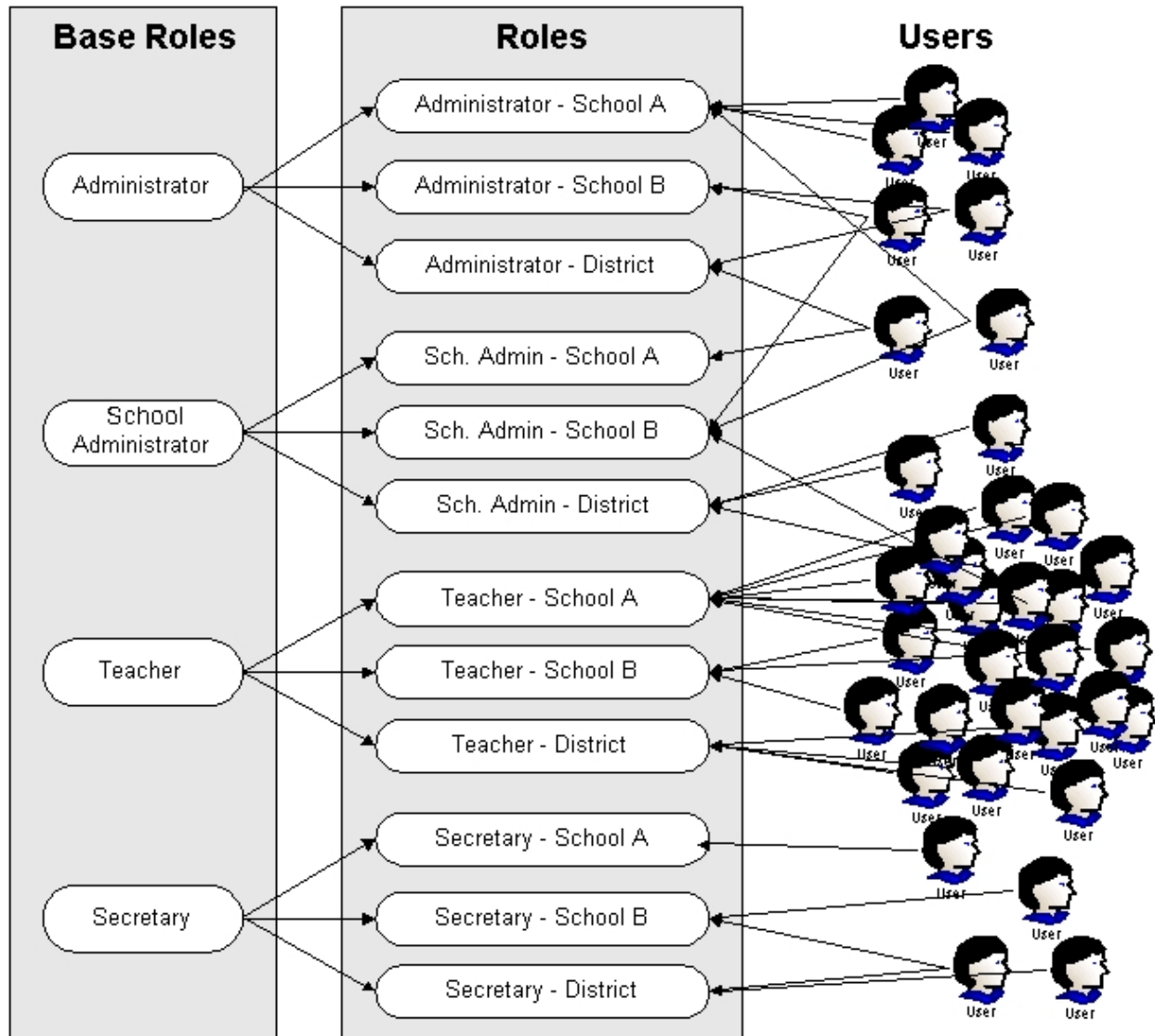
Managing roles

A District Administrator creates and manages all the roles needed for the district or school. A role consists of a scope (specific school or district-wide [p. 240]) and a set of permissions [p. 246], which enable a district administrator to control a user's access to information and system features.

Typically, a school has from three to ten roles. Other roles are needed for use across the district. Typical roles include: District Administrator, District Health Professional, School Health Professional, School Administrator, School Secretary, and Teacher. Using permissions, it is possible for a District Administrator to create roles for more specific purposes, such as Homeroom Teacher and Non-Homeroom Teacher.

Each role is linked to a base role [p. 246]. When a District Administrator creates a new role, that administrator chooses a base role for it. The role takes on that base role's permissions, which the District Administrator can then adjust to create a unique role. However, when a District Administrator makes changes to a base role's permissions [p. 246], that administrator has the option of applying those changes to all roles based on that base role. Since this is optional, it is possible for some of a role's permission to not match those of the base role.

Table 44: **Permissions pertaining to users**

To	You need this permission	Set to	Details
View role settings such as permissions	**User > User Roles**	View	[p. 806]
Change role settings such as permissions	**User > User Roles**	Edit	[p. 806]
Add, change, and delete roles	**User > User Roles**	Delete	[p. 806]

Creating or changing a role

Creating a role involves choosing a base role, naming it, setting its scope, and setting its permissions. Once you have created a role, you can change much about a role but not its scope. In other words, you create a role for a school or for the district. For the purposes of creating or making changes to it, you have the option of making a role inactive across the system, that is, user accounts may have this role assigned but the users are not able to use it.

To create or change a role [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Users and Security**, click <u>Roles</u>. The Roles page appears [*Figure 122*].
3 Click **Add**. The Add Role page appears.
   • To edit a role, click a role's name and click **Role**. The Edit Role page appears [*Figure 126*].
   • To delete a role, select it and click **Delete**.
4 Under **General**, enter or change Information.
5 Under **Permissions**, set permissions [p. 246] for this role.
   • Caution: When you change one or more permissions, log out of PowerSchool SMS then log back in—this ensures that PowerSchool SMS saves the change.
6 Click **OK**.

---

[1]You can do this if your role is District Administrator.

Figure 122: Roles page

Figure 123: Edit Role page

A **Active Role**: Sets the role to be active. If your system employs a directory service this option is Directory Common Name. When a role is inactive, any users with that role do not receive its associated standard alerts [p. 34].

B **Description**: We recommend making the name as explicit as possible.

C **Short Name**: A short name for the role. This is the name PowerSchool SMS uses in lists across the system.

D **Base role**: [p. 246] Determines the role's initial set of permissions. For an existing role, the base roles available in this list are only those in the same base role group [p. 249]. **Note**: When you make a choice here, PowerSchool SMS refreshes the page and sets up the base role's permissions while preserving your other entries.

E **Scope**: Sets the role's scope [p. 240] to **District** or a specific **School**. **Caution**: Once you save the new role, you cannot change its scope.

F **+**: Expands this group of permissions.

Assigning a role to a user account

A user account [p. 236] can have one or more roles assigned to it. As a District Administrator you can assign a role to one or more user accounts at a time. **Note**: When you assign a role to a user account, that user may receive standard alerts associated with that role [p. 34]. **Note**: If the system employs a directory service, you can use this service to assign roles.

To assign a role to a user account [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Users and Security**, click <u>Accounts</u>. The Accounts page appears [*Figure 117*].
3 For **Scope**, choose a list of user accounts to display. Choices include all users on the system, district users only, users at all schools, or users at specific schools. PowerSchool SMS displays a list of users.
   • Or search for user accounts based on last and/or first name.
4 Select one or more users in the list.
5 Click **Assign/Remove Roles**. The Add/Remove Roles page appears.
6 From the Available roles list, select one or more roles and click **Add** to move them to the Selected roles list.
   • To reduce the **Available Roles** list to particular type of role, choose a **Role Scope**.
7 Click **OK**. PowerSchool SMS assigns the Selected roles to the selected user accounts.
   • To remove the Selected roles from the selected user accounts, click **Remove**.

Default role

While a user account [p. 236] has one or more roles, one is designated as the *default role*. The default role is the role that PowerSchool SMS automatically applies when the user logs on to the system [see p.10].

If the user account has only one role, that role is the default role. If the user account has more than one role, the user designates which of the roles available in the account is to be the default role [p. 12]. When the user logs on to a user account for the very first time, PowerSchool SMS prompts the user to designate the default role. Thereafter, the user can change the default role for all future sign-ins [p. 12].

After logging on, the user can switch between roles in the user account at will [p. 12].

---

[1]You can do this if your role is District Administrator.

Role permissions

A role's permissions enable a District Administrator to control each that role's ability to view and change information (such as legal alerts, report cards, and photos) and the actions a user can take [*Figure 124*]. A role inherits the permission settings of its associated base role [p. 246]. Any changes to a role's permissions affect only that role.

Figure 124: Permission settings example

Demographic Data	Edit	▽
Enroll Student in School	Yes	▽
Mass Assign	Yes	▽

Permissions pertaining to actions can be set to:

- *Yes*: The user can complete the action.
- *No*: The user cannot complete the action.

Permissions pertaining to viewing information can be set to:

- *None*: The user cannot see the information.
- *View*: The user can view the information but he or she cannot change or delete it.
- *Edit*: The user can view and change the information but he or she cannot delete it.
- *Delete*: The user can view, change, or delete the information.

A setting for one permission can affect another permission. Refer to the *Permissions catalog* [p. 619] for a detailed description of each permission and its potential settings.

To view a role's permissions: [DA[1]]

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Users**, click **Roles**. The Roles page appears.
3 In the **Role** column, click the role's name. The Edit Role page appears.
4 View permissions.

Base roles

A role [p. 240] is derived from one of a few standard types or *base roles*. A base role, which consists of a set of permissions, acts as both a starting point for new roles and a means of resetting the permissions of existing roles.

By default, PowerSchool SMS provides the following base roles:

- *Administrator*: Can view and change information on all students and staff at all schools in the district. Synonymous with *District Administrator*. The short name is "Admin".

---

[1]You can do this if your role is District Administrator.

- *School Administrator*: Can view and change information for staff at the administrator's school. The short name is "SCHAdmin" [*Figure 125*].
- *Teacher*: Can view information on students who attend the Teacher's classes. Cannot change a student's demographic or contact information. The short name is "TCH".
- *School Secretary*: Can view and change information on students who attend the secretary's school and on staff who work at that school. The short name is "SECRETARY".
- *District Health Professional*: Can view and change information on all students at all schools in the district. The short name is "DISTHP".
- **School Health Professional**: Can view and change health information on students who attend the professional's school. The short name is "SCHHP".
- *School Counselor*: Can view information on students who attend the counselor's school and change information for students assigned to him or her by a District or School Administrator. Typically, a counselor is assigned to a student's Academic Plan [p. 100]. PowerSchool SMS has a Counselor-specific home page [p. 15] the unique characteristic of which is a link to a list of students to whom the Counselor is assigned (this link is labeled **My Students**). This role's short name is "CNSL".
- *Guest*: Is intended for School scope [p. 240]only and roles created from this base role must be assigned permissions. If the District Administrator does not assign a specific role to user account, PowerSchool SMS assigns this role.Caution: Creating a role named "Guest" may cause a software upgrade to fail. This is because during software upgrading PowerSchool SMS needs exclusive use of the Guest base role.

Changing a base role

A District Administrator can change a base role and create new base roles.

When a change is made to a base role, PowerSchool SMS automatically applies that change to all roles based on that base role. This enables the District Administrator to easily control the permissions for a large number of roles.

A District Administrator should consider creating a new base role in circumstances where there is a class of system users that is distinct from PowerSchool SMS's standard base roles; for example, teacher's aides. Creating a base role involves naming it, assigning it to a base role group, and setting its permissions. You can change much about a base role but not its base role group.

To edit a base role [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.

---

[1]You can do this if your role is District Administrator.

2 Under **Users and Security**, click <u>Base Roles</u>. The Base Roles page appears [*Figure 125*].

3 In the **Base Role** column, click a base role's name. The Edit Base Role page appears [*Figure 126*].
- To add a base role, click **Add.**
- To delete a base role, select it and click **Delete**.

4 Under **General**, enter or change Information.

5 Under **Permissions**, set permissions for this base role [*Figure 126*].
- Click "+" to view a permissions category.
- Select the check box of a permission to have that permission applied to all roles that are based on this base role.
- When you add a new base role, all permissions are initially set to "No" or "None".
- Caution: When you change one or more permissions, log out of PowerSchool SMS then log back in—this ensures that PowerSchool SMS saves the change.

6 Click **OK**.

Figure 125: Base Roles page

A **Base Role**: The name (Description) of the role.
B **Short Name**: An abbreviated name used by PowerSchool SMS in various places.
C **Group**: Specifies the base role group [p. 249].

A +: Expands this group of permissions [*Figure 127*]
B Propagates this permission's setting to all roles based on this base role. [*Figure 127*]

Figure 127: Base role permissions example

A Propagates this permission's setting to all roles based on this base role.
B The bold blue font indicates a permission that has been changed but not yet saved.

Table 45: Permissions pertaining to base roles

To	You need this permission	Details	Set to
View base role settings such as permissions	**Users > User Roles**	[p. 806]	View
Change base role settings such as permissions	**Users > User Roles**	[p. 806]	Edit
Add, change, and delete base roles	**Users > User Roles**	[p. 806]	Delete

Base role groups

Each base role [p. 246] belongs to a *base role group*. A base role group is a general classification for the convenience of the District Administrator when managing user roles. In general, once a role is set up, you can change its base role only to another base role in the same base role group.

By default, PowerSchool SMS provides the base role groups:

* *District Administrator*
* *School Administrator*
* *Teacher*

- *Secretary*

These groups are fixed; you cannot change, delete, or add a base role group.

Making reports available

All reports installed on a PowerSchool SMS system [p. 130] are automatically available to all user roles [*Understanding your role* p.12]. However, you can control the access of each user role to each report using permissions [p. 246], or you can make a report inactive [p. 250].

Access options include:

- *View*: The user can run the report and set options prior to doing so.
- *Edit*: In addition to viewing the report, the user can create a custom version of it.
- *Delete*: In addition to editing the report, the user can delete it.
- *None*: The link to the report is disabled. The user can see the report's name but cannot view it.

Making a report inactive

You have the option of hiding a report [p. 114] from other users. PowerSchool SMS displays *active* reports, that is, reports that are available for use by you and other users. You have the option of rendering a Report Package report [p. 130] *inactive* (but not built-in reports [p. 114]); in this state, the report is not visible to other users.

Where the **Pre-4.2 Reports** page is available, you cannot make one of these reports inactive.

To make a report inactive [SA, DA[1]]:

1 In the **Admin** menu, click **DistrictSetup. The District Setup page appears.**
2 Under Reports, click **Customize Reports**. The Customize Reports page appears displaying a list of available reports.
   - To restrict the list to a certain kind of report, select a **Category**.
3 In the **Report Name** column, click the report's name. The Edit Report page appears.
4 Under **General**, set the **Report Status** to **Inactive**.
5 Click **OK**.

---

[1]You can do this if your role is School Administrator or District Administrator.

District setup

A District Administrator sets up and maintains district-specific information, district-wide preferences such as for student numbers, and standard choices for use by School Administrators such as attendance codes and grade levels.

Setting up and maintaining a district in PowerSchool SMS involves, among other responsibilities, the following:

- *District-specific information* [p. 251]
- *District calendar setup* [p. 252]
- *District user setup* [p. 260]
- *Grade level specification* [p. 200]
- *Staff setup* [p. 261]
- *Alerts setup* [p. 263]
- *Family setup* [p. 264]
- *Student enrollment setup* [p. 267]
- *Academic plan setup* [p. 269]
- *Developing reports* [p. 279]

District setup and maintenance may also involve setting preferences and formats involving:

- *Student numbers* [p. 257]
- *State attendance code setup* [p. 264]
- *Student behavior setup* [p. 265]

To work with a district's setup, a user must be assigned a role as a District Administrator [p. 236]. For information on aspects of district setup not yet listed here, please refer to the *PowerSchool SMS District Administrator Addendum*.

District-specific information

A District Administrator can store district-specific information, such as the district's identity, office contact details, and the superintendant's identity and contact details. PowerSchool SMS uses this information throughout the system.

To set up or change the district-specific information: [DA[1]]

1 In the **Admin** menu, click **District Setup**.
2 On the District Setup page, under **District**, click **Profile...**.
   The District Profile page appears.
3 On the District Profile page, enter or change information, which includes:
   - **District Name**: The District's formal name. PowerSchool SMS displays this name throughout its interface, including in built-in reports.
   - **District Number**

---

[1]You can do this if your role is District Administrator.

- **School Year**: The current school year.
- **District Office: Email**: The district's main email address for student information-related communications.
- **District Office: Phone Number**: The main phone number for student information-related communications.
- **District Office: Fax Number**: The main fax number for student information-related communications.
- **Physical address**: Enter the district's address, including City, State, Zip Code, and County.
- **Mailing address**: Include only if the Mailing Address differs from the Physical Address.
- **Superintendent: Title**: The district superintendent's title, such as Mr., Miss, Ms., or Mrs.
- **Superintendent: Last Name**: The district superintendent's last name.
- **Superintendent: First Name**
- **Superintendent: Middle Name**
- **Superintendent: Phone Number**: The district superintendent's main phone number.
- **Superintendent: Email**

4 Click **Save**. PowerSchool SMS saves the information and closes the page.

District calendar setup

A district calendar is the foundation upon which other aspects of the district's setup and operation are laid out. In a PowerSchool SMS system, a district has three types of calendars [*Figure 128*]:

- *Active Calendar* [p. 172]: The calendar for the current district year.
- *Planning Calendar* [p. 255]: The calendar used to schedule and plan for the coming district year. At the end of the year, this calendar is converted to the Active Calendar. A school's Planning Calendar [p. 172] is derived from the district's.
- *Historical calendar* [p. 257]: A former Active Calendar for a past district year. The system can hold several historical calendars. For information about viewing the data in a historical calendar, contact Technical Support.

Figure 128: District Calendars page

	*District calendar name	*Start (mm/dd/yyyy)	*End (mm/dd/yyyy)	Creation Date (mm/dd/yyyy)	Release	Type	Work with
☑	2010 - 2011	07/15/2010	07/14/2011	03/05/2010	6.7.1.0102	Planning	○
☐	2009 - 2010	07/15/2009	07/14/2010	03/09/2009	6.6.4.0304	Active	◉
☐	2008 - 2009	07/14/2008	07/14/2009	03/10/2008	6.5.4.0008	Historical	○
☐	2007 - 2008	07/15/2007	07/13/2008			Historical	○
☐	2006 - 2007	07/15/2006	07/14/2007			Historical	○
☐	2005 - 2006	08/14/2005	07/14/2006			Historical	

Selected: 1   Total: 30

Table 46: **Permissions pertaining to the district Planning Calendar**

To	You need this permission	Set to	Details
Create a district Planning Calendar	**District > Define District Calendar**	Yes	[p. 645]
Switch district calendars	**District > Define District Calendar**	Yes	[p. 645]

Managing a district's calendars

For the district's calendars, a District Administrator can adjust the calendar name and the date range covered by the calendar. A District Administrator can also create a new Planning Calendar and, if necessary, delete the Planning Calendar.

Caution: Once you create a district Planning Calendar, you cannot delete it.

Caution: On a newly installed PowerSchool SMS system, we recommend that the District Administrator set up all aspects of your system in the Active Calendar (such as schools, users, staff, and so on) before creating a Planning Calendar.

Note: When a District Administrator logs on to a newly set up PowerSchool SMS system, she must set up the default active calendar in order to use that system.

To manage a district's calendars [DA[1]]:

1   In the **Admin** menu, click **District Setup**. The District Setup page appears.
2   Under **District**, click **District Calendar**. The District Calendar page appears.
3   To change a calendar's name, select the calendar in the **District calendar name** column, enter a new name.
    • The name must be unique among calendars in the system.
4   To change a calendar's date range, select the calendar in the **Start** and **End** columns, change the dates.
    • **Start**: The date for the first day of the calendar, such as "08/10/2004". This date must be:
        • For a Planning Calendar, on or after the End date of the district's Active Calendar.
        • After the End date of any historical calendars, if any exist.
    • **End**: The date for the last day of the Planning Calendar, such as "08/09/2005".
        • Typically, the End date is 364 days after the Start date. But it can be from 1 to 550 days after the start date to allow for summer schools and major adjustments in calendars.
    • Ensure that the date range:
        • Is from 1 to 550 days.
        • Does not overlap any other district calendar.

---

[1]You can do this if your role is District Administrator.

- Maintains a continuous range of dates without interruption between district calendars.
- Caution: Ensure that the time between the Start and End dates is long enough to encompass the calendar of every school in the district, including summer schools.

5 To create a new calendar, in the **Actions** menu click **Add Calendar**.
- If a district has the calendars it needs, Add Calendar is not available.

6 Click **OK**.

Default district calendars

On a newly installed PowerSchool SMS system, or a system on which Year-End Processing has just been run [p. 450], PowerSchool SMS automatically creates district calendars. The District Administrator reviews and perhaps adjusts the names and date ranges of these default calendars.

If at least one school had an Active Calendar before YEP was run, PowerSchool SMSautomatically creates a district Active Calendar for the current year as follows:

- **District Calendar Name**: The year of the Start date, followed by a hyphen, followed by the year after the Start date. For example, if the start date is "08/10/2009", the name is "2009-2010".
- **Start**: The earliest start date of the active calendars of all the district schools using the system.
- **End**: The latest end date of the active calendars of all of the district schools using the system.

If at least one school had a school Planning Calendar before YEP was run, PowerSchool SMSautomatically creates a district Planning Calendar for the next year as follows:

- **District Calendar Name**: The year of the start date, followed by a hyphen, followed by the year after the Start date. For example, if the Start date is "08/10/2009", the name is "2009-2010".
- **Start**: The day after the end date of the active calendar.
- **End**: 364 days after the start date.

If the district had historical data before running YEP, PowerSchool SMS creates the appropriate historical calendars for past years as follows:

- **District Calendar Name**: The year of the start date, followed by a hyphen, followed by the year after the Start date. For example, if the Start date is "08/10/2009", the name is "2009-2010".
- **Start**: The earliest start date of the historical calendars of all the district schools using the system.
- **End**: The latest end date of the historical calendars of all the district schools using the system.

Switching between district calendars

Typically, a District Administrator works with the district's Active Calendar. However, for such purposes as planning or reporting [see p.119], the

administrator can switch the calendar in use to the Planning Calendar [p. 171]. When a District Administrator logs in, PowerSchool SMS displays the last calendar the administrator used. PowerSchool SMS displays a constant reminder as to the calendar with which the user is working [*Figure 129*].

To switch district calendars:

1   On the Home page [p. 15], from the **Actions** menu, click **Switch Calendar**. The District Calendar page appears [*Figure 129*].
2   In the **Work with** column, select the appropriate calendar's check box.
3   Click **OK**.

District Planning Calendar

The Planning Calendar enables a District Administrator to prepare for the next school year (also known as *next-year preparation*) [p. 435]. At the appropriate time, the administrator has PowerSchool SMS convert the Planning Calendar to the Active Calendar (and the Active Calendar becomes a historical calendar) see *Preparing for Year-End Processing [school]* [p. 450]. A system has only one Planning Calendar. An administrator can view the Planning Calendar by switching to it [p. 254].

When a District Administrator works with the district Planning Calendar, the information to which the administrator has access differs from that of the district Active Calendar. In general, the administrator has access to less information in the Planning Calendar than in the Active Calendar and the information available supports the Next-Year Preparation process [p. 435]—links to the information that is not available are grayed out [*Figure 129*]). The information includes:

- **STUDENT**: Enables you to work with students who will be attending the school next year.
- **Admin: District Setup**: Displays links appropriate for the next year, including the following:
  District Calendar: Enables you to you define and switch calendars.
  Course Catalog: Enables you to set up subjects and courses for the next year. You can also edit course setup lists.
  Next Year Preparation: Provides access to Staff Scheduling Defaults, Course Catalog, Publish District Calendar Settings, and geocode map.
  Address Validation Setup: Appears only on a system that employs address validation. Enables you to set entry grades, define the geocode map, and set up address validation.
  Address Exceptions: Appears only on a system that employs address validation. Enables you to record address exceptions for specific students.
- **PROGRAMS**: Enables you to search for programs for the next school year.
  Manage Programs: Enables you to manage program participants, queues, and applicants for the next school year.

Figure 129: Planning Calendar District Setup page example
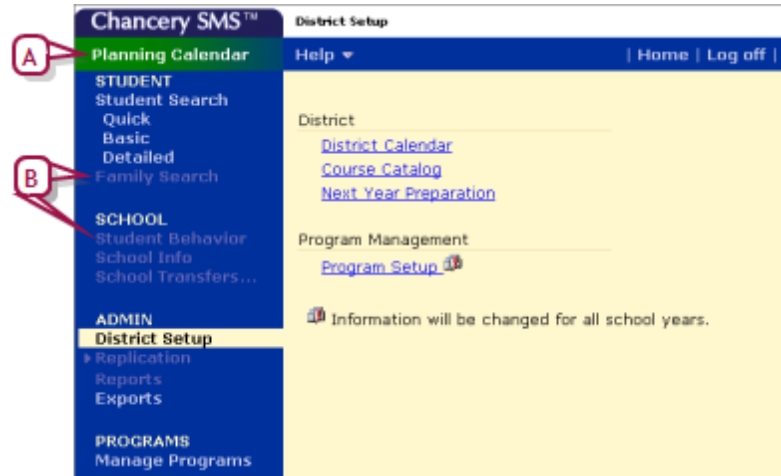
A   Planning Calendar indicator
B   Grayed out link: Indicates that you do not have access to this
    link in this calendar.

District Planning Calendar setup

Many elements of the district Planning Calendar are shared with the Active Calendar. Thus any changes to these elements in one calendar affect both calendars. Such elements include:

- Address validation setup: School entry grade levels, address exception reasons, and geocodes are shared between the active and Planning Calendars. For detailed information, refer to the *PowerSchool SMS Address Validation Guide*.
- Buildings and rooms
- Grade levels
- Course setup lists
- Program setup: Shared, except program sessions.
- Saved lists
- Staff: Except staff course preferences (staff course preferences are calendar-specific, but are only copied if a new planning schedule is copied from the Active Calendar [p. 303])

Some elements of the district Planning Calendar are copied from the Active Calendar when the District Administrator creates the planning calendar. Thereafter, these elements in the two calendars are separate—any changes to the elements in the Active Calendar do not affect their counterparts in the Planning Calendar. Indeed, some of these elements must be modified to suit the year being planned. Such elements include:

- Address exceptions: PowerSchool SMS calculates these values based on the address validation settings and the students' requested schools in the Planning Calendar. For detailed information, refer to the *PowerSchool SMSAddress Validation Guide*.
- Address validation setup: PowerSchool SMS copies address ranges from the Active Calendar to the Planning Calendar. (During

Next-Year Preparation [p. 435] and Year-End Processing [p. 450],
PowerSchool SMS uses the address ranges from the Planning Calendar
when projecting and assigning students to their next year school.)
For detailed information, refer to the *PowerSchool SMS Address
Validation Guide*.

- Course catalog: We recommend that you set up as much of the
  course catalog as possible before creating the Planning Calendar.
- District-defined scheduling constraints [p. 310]
- Geocode map [p. 152]
- Program sessions: PowerSchool SMS creates program sessions in the
  Planning Calendar according to the Planning Calendar Option setting
  for the session the first time the nightly process is run only.
  PowerSchool SMS does not update program sessions in the Planning
  Calendar during subsequent nightly processes.
- School-defined scheduling constraints [p. 310]: Although school-
  defined constraints are not available in the district Planning
  Calendar, they will be available at the school when a School
  Administrator creates a school's Planning Calendar. Any school-
  defined constraints the District Administrator sets after creating the
  district Planning Calendar are not copied to the school Planning
  Calendar.
- Staff scheduling defaults [p. 280]
- Subject framework: We recommend that you set up as much of the
  subject framework as possible before creating the Planning
  Calendar.

Some elements of the district Planning Calendar are neither copied from the
Active Calendar nor linked to it. The district administrator must set up these
elements in the Planning Calendar.

District historical calendar

Once a calendar is converted to a historical calendar, a District
Administrator can no longer make changes to it. A typical system holds more
than one district historical calendar.

Student numbers

PowerSchool SMS identifies each student in a district by a number. Every
student number in the district is unique. PowerSchool SMS prevents duplicate
numbers, that is, no two students can have the same student number.

During student registration, system users can type in each new student
number, or a District Administrator can set PowerSchool SMS to generate new
student numbers automatically [p. 257]. Caution: Once the number is
entered or generated, it cannot be changed.

Automatically generated student numbers

PowerSchool SMS can generate student numbers according to preset criteria,
including length in digits. These criteria are applied to the creation of

student numbers across the district.

An auto-generated student number has up to four components. For examples, see *Table 47* [p. 258]:

- Prefix padding: Increases the number of digits in the prefix by a fixed number to ensure the number matches the specified prefix length.
- Prefix: This can be fixed set of characters or an automatic set generated from such information as graduation year, current year, or school ID number.
- Main part padding: Increases the number of digits so that the number matches the specified student number length.
- Main part: Increments for each new number according to your specified amount. If the main part is a mixture of letters and numbers, the number increments starting from the last character; for example: AA98, AA99, AB00, AB01.

Table 47: **Sample auto-generated student numbers**

Complete number	Prefix Padding	Prefix	Main part padding	Main part
0001999AAA29412	000	1999	AAA	29412
2009QQQQQ000600		2009	QQQQQ	000600

Note: Pearson Support can advise you on how to generate the type of student number you need.

To control how student numbers are generated [DA[1]]:

1 In the **Admin** menu, click **District Setup**.
2 On the District Setup page, under **Preferences**, click **General....** The General Preferences page appears.
3 On the General Preferences page, enter or change information [*Table 47*, p.258] as appropriate.
4 Click **Save**. The page closes and PowerSchool SMS saves your changes.

Address validation

Google Maps™, a visual mapping service, is available to the District Administrator for various tasks, depending on the year-end transfer method employed by the district:

- For a district that employs the Projected School Map Year-End Transfer Method, the District Administrator can ensure student addresses are valid (one or more at a time) and create district and school boundaries. The administrator can also validate student addresses against the defined boundaries.

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[1]You can do this if your role is District Administrator.

- For a district that employs the Geocode Map Year-End Transfer Method, the District Administrator has the option of using automatic address validation, Google Maps address validation, or both.

For further information, see the *PowerSchool SMS Address and Boundary Validation Guide* (formerly the 📄 *Address Validation Guide) available from* https://support.powerschool.com.

To configure address validation: [DA][1]

1 In the **Admin** menu, click **District Setup**.
2 On the District Setup page, under **Preferences**, click **General...**. The General Preferences page appears.
3 On the General Preferences page, enter or change information [*Table 48*, p.259] as appropriate.
4 Click **Save**. The page closes and PowerSchool SMS saves your changes.

Table 48: General Preferences page, Address Validation fields

Field	Description
Use Address Validation	If you selected the Geocode Map year end transfer method, and you want to use address validation, choose Use Address Validation and edit then Address Validation section.
Method of generating address range numbers	To have PowerSchool SMS automatically generate address ranges, select Automatic. To manually enter address range numbers when you define address ranges, select Manual.
Check student addresses against school zones	Select this option to activate address validation. Note: Do not select this option until you have finished setting up the Geocode maps and address ranges.
Enter address by selection only	Select this option if users are required to select a predefined address range rather than manually entering the students address.
Require district approval for address exceptions	Select this option if the district must approve out-of-zone enrollments.
Control access to the "Enroll Student in a School" link for school users	Select this option to disable the "Enroll Student in a School" link on the Registration Steps page for school users when: The student is already enrolled in another school in the district. An address exception does not exist for the student for the school user's school.
Use Google Maps for student address display and validation	
Use Google Maps for district and school boundary definition and display	

---

[1]You can do this if your role is District Administrator.

District user setup

User setup listsdetermine the choices available in various choice lists on the user record used across the district.

To work with a setup list [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click **Setup Lists...**. The Setup Lists page appears.
3 Click the setup list's name. The setup list's options page appears.
4 Set options (which depend on the setup list).
   - To add an item to the list, click **Add...**.
   - To delete an item from the list, click **Delete...**. **Caution**: You may not be able to delete items that are in use in a record in the system.
5 Click **OK**.
6 Click **Return**. The list of Setup Lists appears.
   - Or, click the x to close the window.

Mobile Service Provider setup list

This setup list [p. 260] defines mobile service providers through which PowerSchool SMS can send SMS text-based alerts to alert subscribers' mobile phones [p. 32]. Each setup list item consists of the provider's name and its text messaging gateway [*Figure 130*].

Figure 130: Mobile Service Provider setup list example

Mobile Service Provider - Setup List

Code	Service Provider	Gateway
Alltel	Alltel	@message.alltel.com
Ameritech	Ameritech	@paging.acswireless.com
ATT	ATT Wireless	@txt.att.net
Bellsouth	Bellsouth	@bellsouth.cl
Boost	Boost	@myboostmobile.com
CellularOne	CellularOne	@mobile.celloneusa.com
Cingular	Cingular	@mobile.mycingular.com
Edge	Edge Wireless	@sms.edgewireless.com
MetroPCS	Metro PCS	@mymetropcs.com
N/A	N/A	N/A
Nextel	Nextel	@messaging.nextel.com
O2	O2	@mobile.celloneusa.com
Orange	Orange	@mobile.celloneusa.com
Qwest	Qwest	@qwestmp.com
Rogers	Rogers Wireless	@pcs.rogers.com
SprintPCS	Sprint PCS	@messaging.sprintpcs.com
T-Mobile	T-Mobile	@tmomail.net
Teleflip	Teleflip	@teleflip.com
Telus	Telus Mobility	@msg.telus.com
USCellular	US Cellular	@email.uscc.net
Verizon	Verizon	@vtext.com
Virgin	Virgin Mobile	@vmobl.com

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[1]You can do this if your role is District Administrator.

A **Service Provider**: The name of a mobile telephone service provider. This is the label that PowerSchool SMS displays in the choice list.
B **Short Code**: A shorter code-version of the provider's name.
C **Gateway**: The provider's text messaging gateway.

Staff setup

In general, a District or School Administrator sets up records for each staff member [*Adding staff* p.230] while School Administrators maintain those *staff records* and use them for scheduling classes [p. 280] and other school-level assignments [*School staff* p.215]. Before setting up staff records for the district, you may wish to customize the standard staff record by configuring the relevant staff setup lists [p. 262].

By default only a District or School Administrator can delete staff records, school assignments, and staff assignments. Access to staff records can be adjusted using permissions [*Table 49*, p.261].

Table 49: Permissions pertaining to staff records

To	You need this permission	Set to	Details
Delete staff records	**Staff > Staff Demographics**	Delete	[p. 754]
Create staff records	**Staff > Staff Demographics**	Edit	[p. 754]
Change staff records' Overview information	**Staff > Staff Overview** **Staff > Staff Demographics**	Edit Edit	[p. 754] [p. 754]
Change staff records's Address/Phone information	**Staff > Staff Address/Phone** **Staff > Staff Demographics**	Edit Edit	[p. 753] [p. 754]
Change staff records's Professional Info information	**Staff > Staff Professional Info** **Staff > Staff Demographics**	Edit Edit	[p. 755] [p. 754]
Change staff records's Additional Info information	**Staff > Staff Additional Info** **Staff > Staff Demographics**	Edit Edit	[p. 752] [p. 754]
Change school information for staff on the Staff School page	**Staff > Staff Schools**	Edit	[p. 756]
Delete school records	**Staff > Staff Schools** **Staff > Staff Demographics**	Delete Delete	[p. 756] [p. 754]
Change school staff assignments	**Staff > School Staff Assignments** **Staff > Staff Demographics**	Edit Edit	[p. 752] [p. 754]
Delete school staff assignments	**Staff > School Staff Assignments** **Staff > Staff Demographics**	Delete Delete	[p. 752] [p. 754]
Change district staff assignments on the Schools List page	**Staff > District Staff Assignments** **Staff > Staff Demographics**	Edit Edit	[p. 751] [p. 754]
Delete district staff assignments	**Staff > District Staff Assignments** **Staff > Staff Demographics**	Delete Delete	[p. 751] [p. 754]

Staff setup lists

Staff setup lists [*Table 50*, p.262], maintained by a District Administrator [p. 260], determine the choices available in various choice lists on the staff record used across the district.

Table 50: Staff setup lists

Setup list name	Staff record field	Staff record page > tab
Instruction Type to EL	**Instr. Type to Eng. Learners**	Add Assignment Edit Assignment
Mobile Service Provider	**Mobile Service Provider**	Add Assignment Edit Assignment
Licensure Check	**Licensure Check**	Add Staff Demographics > Professional Info Edit Staff Demographics > Professional Info
Scheduling Aide Type	(Types of scheduling aides.)	
Staff Assignment	**Staff Assignment** (Positions to which a staff member may be assigned.)	Add Assignment Edit Assignment
Staff Credential or Teaching Area	**Credential Area**	Add Staff Demographics > Professional Info Edit Staff Demographics > Professional Info
Staff Credential Type	**Credential Type**	Add Staff Demographics > Professional Info Edit Staff Demographics > Professional Info
Staff Department	**Staff Departments**	Add Schools Edit Schools
Staff Education Level	**Education level**	Add Staff Demographics > Professional Info Edit Staff Demographics > Professional Info
Staff Job Classification	**Job Classification**	Add Assignment Edit Assignment
Staff Status	**Status**	Add Staff Demographics > Professional Info Edit Staff Demographics > Professional Info
Staff Service to English Learner	**Instr. Services to English Learners**	Add Staff Demographics > Professional Info Edit Staff Demographics > Professional Info
Staff Status	**Staff Status**	Add Schools Edit Schools
Teacher Fund	**Teacher Funds**	Add Schools Edit Schools
Teacher Position	**Position**	Add Staff Demographics > Professional Info Edit Staff Demographics > Professional Info

To work with a setup list:[DA][1]

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[1]You can do this if your role is District Administrator.

1   In the **Admin** menu, click **District Setup**. The District Setup
     page appears.
2   Under **District**, click <u>Setup Lists...</u>. The Setup Lists page
     appears.
3   Click the setup list's name. The setup list's options page
     appears.
4   Set options (which depend on the setup list).
     - To add an item to the list, click **Add...**.
     - To delete an item from the list, click **Delete...**. Caution: You may
        not be able to delete items that are in use in a record in the system.
5   Click **OK**.
6   Click **Return**. The list of Setup Lists appears.
     - Or, click the x to close the window.

Alerts setup

PowerSchool SMS can automatically monitor information and conditions in the system for changes that are relevant to users. For alerts to operate, users must subscribe [*Alerts* p.32]. If the alert definition includes a mobile alert option, then an administrator must support it with system-wide settings [p. 263].

Supporting mobile alerting

For a user at a school to be able to subscribe to a mobile alert [p. 32], a District Administrator and system administrator must set up the PowerSchool SMS system to support the sending of "SMS" (simple messaging service) text messages. This involves:

- Specifying the SMTP server from which the messages are sent.
- Setting the Web Server.
- Adding mobile phone information to applicable user account.

You may also need to update the Mobile Server Provider setup list see *Mobile Service Provider setup list* [p. 260]. Note: The designated mobile service provider may charge users for text messages received from PowerSchool SMS. Contact the service provider for further information.

When PowerSchool SMS sends a mobile alert, it uses a sender address that is exclusive to mobile alerts: "[District name]@Chancery.SMS.com", where [District name] is equal to the contents of the database field "CLS_DIS_ DISTRICT_INFO.NAME".

To support mobile alerts on a system:

1   Set up the PowerSchool SMS system's Web Server [p. 401] as a
     trusted relay. This will allow the relay of SMTP data through
     the SMTP server.
2   [SA[1]] Ensure that the system's SMTP server is identified:
     a   View the General Preferences page [p. 236].

---

[1]Do this if your role is System Administrator.

    b Under **E-Mail and Mobile Alert Notification**, ensure that **SMTP Server Address** is set to either a fully-qualified domain name (FQDN) or an IP address. The **SMTP Server Port** defaults to "25", unless you have modified this field.

3 [DA[1]] Ensure that each applicable user account is able to receive mobile alerts:

    a Find and view the user account [p. 236].

    b Enter a **Mobile phone** number. Enter only numbers, for example, "6045559876". Do NOT enter any dashes, spaces, dots, or brackets. When PowerSchool SMS sends a mobile alert via SMS text message to user's mobile phone, it addresses it to "[user's phone number]@[mobile phone provider]".

    c Under **General**, choose a **Mobile Service Provider**. You can set the choices available using a user setup list [p. 260].

Family setup

PowerSchool SMS automatically generates a *family number* for each family. By default, system users cannot change this number. However, you have the option of enabling system users to change the Family Number.

To control the editing of family numbers [DA[2]]:

1 In the **Admin** menu, click **District Setup**.

2 On the District Setup page, under **Preferences**, click **General...**. The General Preferences page appears.

3 Under **Family Management**, set the **Override**.

    • Choices are: "Cannot change family number" and "Allow changing family number"

4 Click **Save**. The page closes and PowerSchool SMS saves your changes.

State attendance code setup

A District Administrator sets up *state-equivalent attendance codes* for use by a School Administrator setting up attendance codes for a school. A School Administrator must map every school attendance code to a state equivalent [*Setting up school attendance codes* p.185]. This facilitates accurate attendance reports to the district and from there to the state [*Attendance Reports* p.534]. A state-equivalent attendance code appears as a choice for the **State equivalent** field [p. 185].

To set up a state attendance code [DA[3]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.

---

[1]Do this if your role is District Administrator.
[2]You can do this if your role is District Administrator.
[3]You can do this if your role is District Administrator.

2 Under **District**, click <u>Setup Lists...</u>. The Setup Lists popup page appears.

3 Under **N/A**, click **State Attendance Code**. A list of the codes available for use in the district appears.
- The code's **Description** appears in lists.
- The code's **Short Code** is for use by PowerSchool SMS.

4 Make changes.
- To add a new code, click **Add**.
- To delete a code, select it and click **Delete**.
- To combine two codes, select them and click **Merge....** **Note**: The Merge button appears only when there is one or more state attendance codes entered.

5 Click **OK**.

6 Click **Return**. The list of Setup Lists appears.
- Or, click the x to close the window.

Student behavior setup

A District Administrator can set preferences for the handling of student behavior incident records across the district. Such preferences include the calculation of suspension days, the category of incidents displayed to users, and access to the behavior incident records of students who transfer from one district school to another.

To work with district student behavior preferences [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.

2 Under **District**, click <u>Setup Lists</u>. The Setup Lists page popup appears.

Table 51: **Permissions pertaining to student behavior setup**

To	You need this permission	Set to	Details
Set district student behavior preferences	**Student Behavior > Student Behavior Preferences**	Yes	[p. 763]

Behavior attendance actions setup

A District Administrator sets up student behavior attendance actions and associates them with a behavior action step. This enables a School Administrator to associate a school attendance code with each attendance action [*Setting up attendance related to student behavior* p.198]. Each behavior attendance action has a priority setting that enables PowerSchool SMS to determine which attendance code to assign where several behavior actions are recorded for a student on the same day and those actions are associated with different attendance codes.

To set up a behavior attendance action [DA[2]]:

---

[1]You can do this if your role is District Administrator.
[2]You can do this if your role is District Administrator.

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click <u>Setup Lists</u>. The Setup Lists page popup appears.
3 Under **Student Behavior**, click **Behavior Attendance Action**. The Behavior Attendance Action - Setup List appears.
4 Click **Add....** The Add List Item page appears.
  - To edit a student behavior action, click the action's name. The Edit List Item page appears.
  - To delete a student behavior action, click **Delete....**
5 Enter or change Information, which includes:
  - **Description**
  - **Short Code**
  - **Priority**: Specifies the priority of this attendance action. A number between 0 and 9; the lower the number, the higher the priority.
6 Click **OK**.
7 Click **Return**.

To associate a behavior attendance action with a behavior action step [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click <u>Setup Lists</u>. The Setup Lists page popup appears.
3 Under **Student Behavior**, click **Behavior Action Step**. The Behavior Action Step - Setup List appears.
4 Click **Add....** The Add List Item page appears.
  - To edit a step, click the step's name. The Edit List Item page appears.
  - To delete a step, click **Delete....**
5 Enter or change Information, which includes:
  - **Attendance Action**: The student behavior attendance action that applies.
6 Click **OK**.
7 Click **Return**.

As a District Administrator you can also set up actions associated with particular Events/Concerns see *Adding incident events or concerns* [p. 96].

Table 52: Permissions pertaining to student behavior attendance setup

To	You need this permission	Set to	Details
Set up student behavior attendance actions	**School Setup > Attendance General Settings**	Yes	[p. 707]
To change an attendance code set by student behavior action steps	**Attendance > Override Student Behavior Attendance**	Yes	[p. 632]

[1]You can do this if your role is District Administrator.

Student enrollment setup

A District Administrator can configure how students are enrolled [p. 72] in the district and how PowerSchool SMS manages enrollment information. PowerSchool SMS applies these settings across the system. These settings are of particular significance for year end [p. 434].

Under **Student Enrollment**, settings include:

- **# of concurrent enrollments allowed**: The maximum number of schools in which a student can have an enrollment record. The default is "99".
- **Allow enrollment in**: Controls the Registration Grade Level to which you can assign a student you add to the district. Choices include: "Any School" and "School with Student's Registration Grade". The latter restricts the enrollment of a student to schools that have their grade level available.
- **Minimum enrollment age**: The minimum age in years that a student must be on the date of the student's first entry-type status code. PowerSchool SMS does not permit a student younger than this age to be enrolled. **Note:** When referring to this age, PowerSchool SMS calculates the student's age using that student's full birth date, not just the year.
- **Graduation Month**: The month of the year in which the district graduates students from their current grade level.
- **District Graduation Grade Level**: The grade level at which the PowerSchool SMS graduates students from the district. This setting is relevant to Year-End Processing [p. 450].Choices include the grades 1 through 20 and: "NA", "Pre-enrolled", "Pre-Kindergarten", "Kindergarten", "Kindergarten-AM", "Kindergarten-PM".

Under **Fields Required or Recommended for Registration and Enrollment** settings include:

- **Required fields**: Enables selected fields to be part of the enrollment process and specifies the information required during enrollment.
- **Recommended fields**: Enables selected fields to be part of the enrollment process and specifies the information that we recommend be included during enrollment.
- **Address requirements**: Determines if an administrator must provide a physical address for the purposes of school mailings to the student or parent/guardian, and if such mailings are required.
- **At least one contact required**: Determines if the administrator must provide at least one contact (typically a parent/guardian) for each student [p. 64].

Under **Year-End Processing Options for Graduating Students** settings include:

- **Set district graduated student grade level to**: These options, which are relevant to Year-End Processing [p. 450], are:

Next projected grade level: With this option selected, PowerSchool SMS uses the projected grade level specified in the district settings [*Projected grade levels* p.436].

District graduating grade level: PowerSchool SMS sets the student's grade level to this value or the next and future years but records that student as having graduated. During Year-End Processing [p. 450], PowerSchool SMS graduates the student and withdraws the student from his or her current school.

Selected grade level: PowerSchool SMS uses the grade level selected. Choices include the grades 1 through 20 and "NA", "Pre-enrolled", "Pre-Kindergarten", "Kindergarten", "Kindergarten-AM", "Kindergarten-PM".

Under **Year-End Processing Options for Status Code Dates** settings include:

- **Set enrollment date:** Options are District Planning Calendar start date or that of the School Planning Calendar.
- **Set withdrawal date**: Options are District Planning Calendar end date +1 day or that of the School Planning Calendar.

Under **Year-End Processing Options for Status Code** settings include:

- **Students transferring receive this withdrawal code**
- **Students transferring receive this re-entry code**
- **Students graduating receive this code**
- **Students returning to the same school**

To configure district student enrollment: [DA][1]

1 In the **Admin** menu, click **District Setup**.
2 On the District Setup page, under **Preferences**, click **Registration and Enrollment...**. The Registration/Enrollment Preferences page appears.
3 Enter or change information under the relevant sections, which include:
   - **Student Enrollment**
   - **Fields Required or Recommended for Registration and Enrollment**: To move an item from one list to the other, click on the item and drag it. You can select and drag more than one item at a time by pressing Shift or Ctrl and clicking.
   - **Year-End Processing Options for Graduating Students**
4 Click **Save**. PowerSchool SMS saves the information and closes the page.
   - Click **Apply** to have PowerSchool SMS validate the settings before saving them.

---

[1]You can do this if your role is District Administrator.

To	You need this permission	Set to	Details
Set district-wide preferences for registration and enrollment	**Students > Registration and Enrollment Preferences**	Delete	[p. 655]

Academic plan setup

A District Administrator can create one or more *academic plans* [p. 100] for use in the district. To create a plan, a District Administrator creates an academic plan and then creates *versions* of that plan. Typically, each plan version corresponds to a specific year or range of years. It is the plan version that a School Administrator assigns to a student [p. 105]. To facilitate assignment to students, a District Administrator can designate one plan as the default for the district. **Note**: Academic plans replace graduation plans.Pearson intends to phase out graduation plan features in future versions of PowerSchool SMS. If necessary, Pearson Support can help you convert existing graduation plans to academic plans and assign them to students.

Setting up an academic plan involves:

- *Setting up an academic plan and its versions* [p. 269].
- *Selecting courses for an academic plan version* [p. 272].
- *Setting course credit assignment priority* [p. 275].
- [Optional] *Setting aptitude and achievement requirement rules* [p. 277].
- [Optional] *Designating an academic plan as the district default* [p. 278].

Table 54: **Permissions pertaining to academic plan setup**

To	You need this permission	Set to	Details
Add, edit, delete, and copy academic plans and versions.	**District > Academic Plan Setup**	Delete	[p. 634]
Add or edit academic plans and versions.	**District > Academic Plan Setup**	Edit	[p. 634]
Hide the **Plan Setup** link on the District Setup page.	**District > Academic Plan Setup**	None	[p. 634]

Setting up an academic plan and its versions

An academic plan consists of the plan name and at least one version. A plan version applies to one year or a span of years. Each plan version can also differ in its structure (for example, course groups and required credits) and rules (for example, aptitude test requirements).

When a District Administrator sets up a new academic plan, PowerSchool SMS automatically creates the first version of that plan. When a District Administrator creates an additional version of that academic plan, PowerSchool SMS duplicates the structure and rules of the most recent (in

terms of year range) plan version and automatically sets the start year to the next year that follows the end year of the duplicated plan version.

To create a new academic plan:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.

2 Under **Academic Planner**, click **Plan Setup**. The Academic Plans page appears [p. 271]

3 Click **Add Plan**. The Academic Plan Setup page appears [*Figure 69*]. This enables you to set up the first version of a new academic plan.
   - To duplicate an academic plan and its most recent version, click **Copy Plan**.

4 Enter or change the plan version's information, which includes [*Figure 69*]:
   - **Plan name:** The name must be unique. When adding a new academic plan, the Plan name applies to all its versions. **Note**: We recommend not including date-related information in the Plan name.
   - **Short name:** A short name for the academic plan. This is the name PowerSchool SMS uses in lists across the system. This name is unique for each version of the plan.
   - **Plan version start year:** The year the plan version takes effect. The start year cannot overlap with any other version of this plan.
   - **Plan version end year:** [Optional] Set the year after which you anticipate that this plan version will no longer be relevant. Typically, obsolescence occurs because of a district policy change. If you leave the end year blank, PowerSchool SMS displays the end year as "and beyond" [*Figure 131*].
   - **Total plan credits:** Set the total number of course credits the student requires for this plan version.

5 Click **OK** to save your changes and close the page. PowerSchool SMS adds the new plan and its first version to the Academic Plans page.
   - Or, click **Apply** to save the changes and add structure [p. 272] and rules [p. 277].
   - To delete an academic plan, delete its only remaining version [*Figure 131*].

Figure 131: Academic plan editing
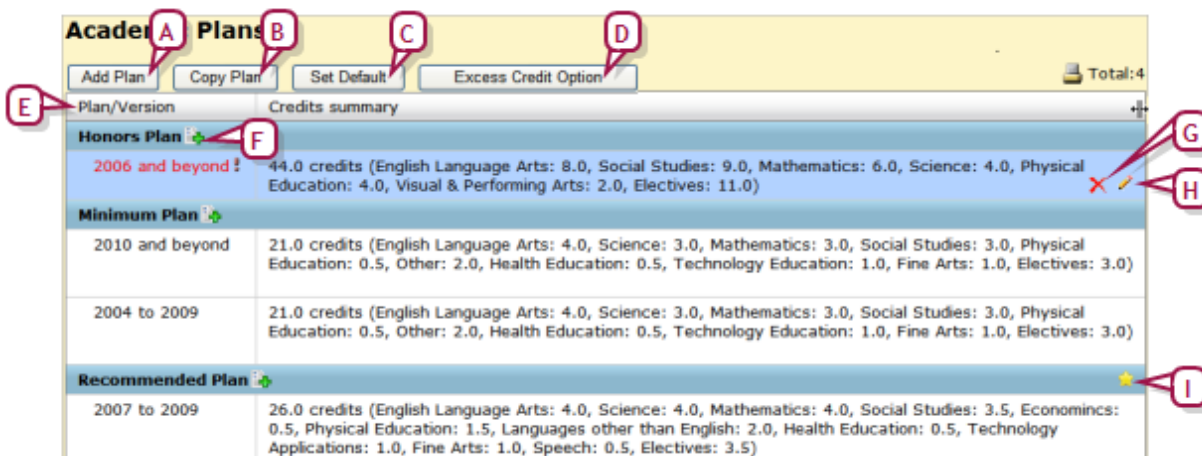
A **Add Plan**: Adds a new academic plan and its first version.

B **Copy Plan**: Duplicates an academic plan and its most recent version.

C **Set Default**: Enables you to select one of the plan versions as the default for the district [p. 278].

D **Excess Credit Option**: Optional feature that enables you toapply excess earned credits to a particular group instead of displaying them in the **Non-contributing course credits** grid on the student's Academic Plan page.

E **Plan/Version**: For each plan, lists the most recent plan version first (in terms of year range). Red text and an exclamation mark indicate an incomplete plan setup [p. 269].

F Add a plan version: Adds a new version to this plan. This new version is identical to the most recent plan version in all except start and end year.

G Delete the plan version: Move the cursor over the plan version and click the delete icon. You cannot delete a plan if that plan is assigned to one or more students.

H Edit the plan version: Move your cursor over the row and click the edit icon. The Academic Plan Setup page appears [*Figure 69*].

I Default plan indicator: Indicates that this academic plan is the default for the district [p. 278].

To create an additional version of an academic plan:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.

2 Under **Academic Planner**, click **Plan Setup**. The Academic Plans page appears [p. 271]

3 Click the Add plan version icon that follows the academic plan's name [*Figure 131*]. The Academic Plan Setup page appears [*Figure 69*] on which PowerSchool SMS displays a duplicate of the structure and rules of the most recent plan version.

4 Adjust the plan version's information, which includes [*Figure 69*]:
   - **Plan name:** The name must be unique to this plan version.

- **Plan version start year:** The year the plan version takes effect. Since a version's start year cannot overlap with another version of this plan, PowerSchool SMS automatically sets the year to the year that follows the end year of the most recent plan version.
- **Plan version end year:** [Optional] Set the year after which you anticipate that this plan version will no longer be relevant. Typically, obsolescence occurs because of a district policy change. If you leave the end year blank, PowerSchool SMS displays the end year as "and beyond" [*Figure 131*].
- **Total plan credits:** Set the total number of course credits the student requires for this plan version.

5 Click **OK** to save your changes and close the page. PowerSchool SMS adds the new plan version to the Academic Plans page.
- Or, click **Apply** to save the changes and add structure [p. 272] and rules [p. 277].

Selecting courses for an academic plan version

An academic plan's *structure* consists of a list of courses from which earned credits would fulfill the plan's requirements. These selected courses, a subset of the courses available in the district's course catalog for the active year, are organized into one or more *course groups* to each of which a minimum number of credits is assigned. Typically, a course group contains a list of courses in a single field of study, such as Science, Humanities, or Physical Education, or a single type, such as Electives. The total of all credits of a plan version's course groups must equal the credits assigned to that plan version.

A course group can consist of one or more *course subgroups*, which can be useful for organizing a course group's courses by such criteria as grade level, difficulty, or specialization; for example, the plan could require a student to take 6 credits of Science (the course group), of which 3 credit must be from a Biology course (the subgroup). A course group can hold up to 6 levels of subgroups. The total of all credits of a group's subgroups must equal the credits assigned to the parent group. **Note**: If a course group contains subgroups, we recommend organizing all courses in the course group into subgroups; in other words, organize all courses into the same level of grouping.

The District Administrator selects courses for inclusion in a group or subgroup by searching the course catalog and selecting from the search results.

To select courses for a group or subgroup:

1 On a plan version's Academic Plan Setup page [p. 269], on the **Plan Structure** tab, move the cursor over the group's row and click the edit icon [*Figure 132*]. The Group Setup page appears [*Figure 133*].
2 In the **Course Search** section, use a **Basic** or **Detail** search to generate a relevant list of courses from the district's course catalog. PowerSchool SMS runs the search and displays matching courses (if any) under **Search Results**.

- Perform the search using the same methods as a Basic [p. 40] or Detail [p. 42] search for students. You can save the results of a search, or save the search criteria for re-use as a *favorite search*.
- Course name is case insensitive (that is, entering english for the course name will produce courses named English and english).
- **Note:** The maximum number of course records you can select in the course record search results at one time depends on the browser [p. 398] you are using, as follows:
  - Microsoft IE 8: 350 or 500 course records, depending on settings (search the <u>Knowledge Base</u> for further information IE 8 settings)
  - Other browsers (such as Firefox or Safari): 1000 course records

3 In the **Search Results** section, select one or more courses.
  - To see historical courses in your search results, click **Include historical courses** [*Figure 133*]. When you select this option, PowerSchool SMS saves the setting and the option remains selected every time you open this page, until you deselect it.
  - To see in your search results courses from the district catalog that are flagged as inactive, click **Include inactive courses**. When you select this option, PowerSchool SMS saves the setting and the option remains selected every time you open this page, until you deselect it.

4 Click **Add to selected courses**. The course(s) appears in the **Selected Courses** panel [*Figure 133*].
  - Or, click **Apply**.
  - To remove a course from the **Selected Courses** list, move the cursor over the course's row and click the delete icon [*Figure 133*].

Figure 132: Course groups

A Move group icon
B Add group icon
C Delete group icon
D Edit group icon

Figure 133: Group setup page
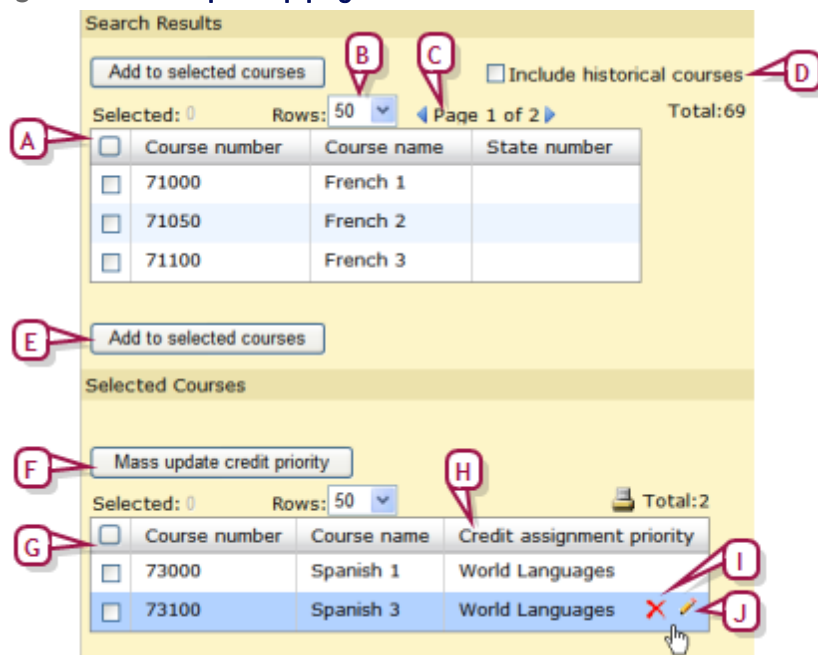
A   **Search Results**: A list of courses generated from a search of
    the course catalog.
B   **Rows:** Indicates the number of course records displayed in
    the search results grid.
C   **Page control:** Use the arrows to move between pages in the
    course search results grid.
D   **Include historical courses:** Select to include historical
    courses in the course search results.
E   **Add to selected courses:** Adds the course(s) selected to the
    Selected Courses list.
F   **Mass update credit priority:** Enables you to set the credit
    assignment priority for selected courses [see p.275].
G   **Selected Courses:** The courses selected for this group or
    subgroup.
H   **Credit assignment priority**: Indicates the course's credit
    assignment priority in this group [see p.275].
I   Delete icon: Removes the course from the group's list.
J   Edit icon: Enables you to set the course's credit assignment
    priority [p. 275].

To add a course group or subgroup:

1   On a plan version's Academic Plan Setup page [p. 269], on the
    Plan Structure tab, in the Group name column, move the
    cursor over a plan version's name and click the Add group icon
    [*Figure 132*]. The Group Setup page appears [*Figure 133*].
    - To edit a group, move the cursor over the group's row and click the
      edit icon [*Figure 132*].
    - Note: To change the position of a group in the hierarchy of groups and
      subgroups, you can drag the group to another position (click on the
      group's move icon [*Figure 132*] and hold the button down as you move
      the cursor).

2 Enter or change the information, which includes:
- **Group name:** The name of the group or subgroup must be unique to this plan version.
- **Required credits:** The minimum number of credits the student must earn from this group or subgroup to meet the plan version's requirements.
- **Maximum credits**: [Optional] The total number of credits the student can earn from this group or subgroup to meet the plan version's requirements. PowerSchool SMS considers any credits earned beyond this total to be surplus see *Earning credits on an academic plan* [p. 104]. If this value is left blank, PowerSchool SMS considers the Required credits to equal the Maximum credits.
- **Collect credits from:**
  - **All associated sub-groups**: [Default] Enables students to earn credits from any of the group's subgroups.
  - **Only one associated sub-group**: Considers credits from only one of the group's subgroup as earned, even where the student has earned credits from several subgroups. For example, in a World Languages group with two subgroups, French and Spanish, and Required credits of 2.0, a student needs to earn 2.0 credits in either French or Spanish.

3 Click **OK**.
- Or, click **Apply** to add or change the group's selected courses.

Setting course credit assignment priority

In an Academic Plan version, more than one group or subgroup can hold the same selected course. When a student earns credits for such a course, PowerSchool SMS determines the group or subgroup to which it applies the course's credits by referring to course's *course credit assignment priority*.

PowerSchool SMS applies the course's credits to the highest priority group or subgroup first; when that group's Required credits total is met, PowerSchool SMS applies any surplus credits to the next priority group, and so on. For example, in a plan version with two groups, "Social Studies" and "Electives", and the course "World History" selected for both, you might set the course's credit assignment priority to be "Social Studies->Electives". This would ensure that when a student earned 3.0 credits for the World History course, PowerSchool SMS would add 3.0 credits to the student's Social Studies group total, unless that total was already met. Where a student has earned credits for several courses in a group, and the total number of credits exceeds the group's Required credits, PowerSchool SMS applies the credits from the highest priority courses first until the total is met.

When you first select a course for a group, PowerSchool SMS automatically sets that course's credit assignment priority to that group [*Figure 133*]. You can change this priority as necessary, typically when you select the same course for another group. You can change the credit assignment priority for one course or for several at once. **Note**: When you make such a change, PowerSchool SMS applies the change to all the plan version's groups and subgroups in which the course is selected.

To change a course's credit assignment priority:

1   On a plan version's Academic Plan Setup page [p. 269], on the **Plan Structure** tab, in the Group name column, move the cursor over a plan version's name and click the edit icon [*Figure 132*]. The Group Setup page appears [*Figure 133*].

2   On the Group Setup page, in the **Selected Courses** panel, move your cursor over the course and click the edit icon [*Figure 134*]. A dialog appears [*Figure 134*].
    • Or, to set the credit assignment priority for more than one course, select the courses and click **Mass assign credit priority**. Note: You can mass update only courses that share the same credit assignment priority.

3   Set the course(s)'s credit assignment priority by adjusting the order of **Selected Groups**:
    • To increase a group's priority, select the group and click the up-arrow button. To decrease a group's priority, select the group and click the down-arrow button.
    • To add a group to the **Selected Groups** list, in the **Available Groups** list, select the group and click the right-arrow button (or double-click the group).
    • To remove a group from the **Selected Groups** list, select the group and click the left-arrow button (or double-click the group).

4   Click **OK**.

5   On the Group Setup page, click **OK.**
    • Or click **Apply** to continue working on the Group Setup page.

Figure 134: Course credit assignment priority
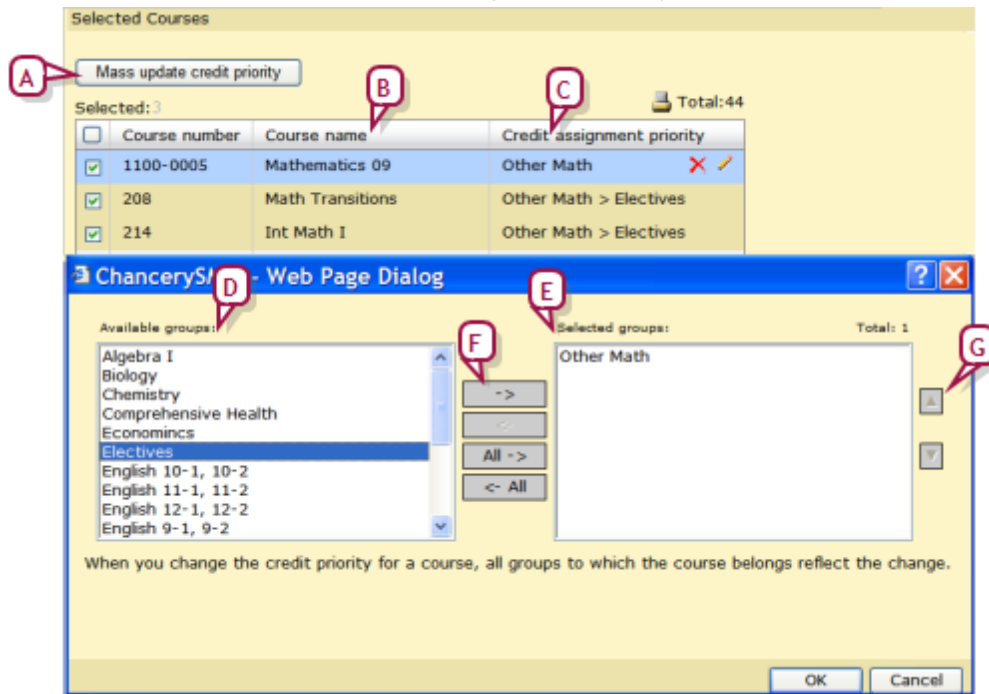
A   **Mass update credit priority**: Enables you to change the credit assignment priority for all the courses selected.

B **Course name**: The list order determines credit assignment priority for the courses in this group. To increase a course's priority, click on its name and drag it to a new position in the list.

C **Credit assignment priority**: Indicates a course's priority settings in terms of group or subgroup names, in order, left to right.

D **Available groups**: Lists the plan version's groups and subgroups for which this course is selected.

E **Selected groups**: Lists groups and subgroups in order of priority for credit assignment.

F Left and right arrows: Enables you to transfer groups between the lists.

G Up and down arrows: Enables you to increase or decrease the priority of a selected group.

Setting aptitude and achievement requirement rules

In addition to course groups, an academic plan can include *rules* that specify one or more aptitude or achievement tests and the minimum acceptable scores for each. Typically the tests are related to college entrance requirements, such as Standard Achievement Test (SAT) and American College Test (ACT). Rule examples include: "SAT Score >= 1122", "Grade Level = 10 AND Age >= 13". These rules also enable a Counselor to assess a student's abilities when recommending courses and academic goals. For detailed information about creating eligibility rules in general, refer to the *Understanding Eligibility Rules Technical Bulletin*.

To create a rule:

1 On a plan version's Academic Plan Setup page [p. 269], click the **Rule Setup** tab. The Academic Plans page appears.

2 Click the add icon [*Figure 135*]. The Rule Definition dialog appears.

3 Set options, which include:
- **Rule name:** The rule name must be unique to this plan version.
- **Description:** A text description of this rule.
- **Category:** Select "Test Management" (the only Category that you can use for an academic plan).
- **Search by:** Select a score type and operator, then enter a value. When you select a score type, PowerSchool SMS displays relevant conditions.
- **Where the following conditions apply**: The conditions displayed depend on the score type selected. Typical conditions include **Start of test date range**, **End of test date range**, and **Test name** (for which you can select from a set of standard tests such as SAT and ACT).

4 Click **Add Criteria**. The new criteria appears under **Eligibility Criteria**.
- To remove a criterion, select it and click **Remove**.
- [Optional] Click **Validate** to have PowerSchool SMS test the validity of the selected criterion and, if the criterion is valid, display a summary.

5 Click **OK**.

Figure 135: Rule Setup
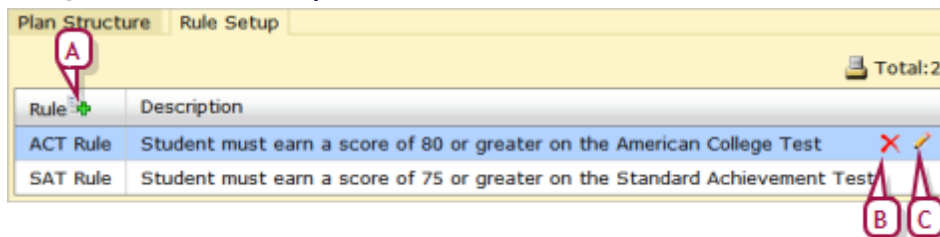
A   Add icon
B   Delete icon
C   Edit icon

Designating an academic plan as the district default

Where a system's setup does not permit a choice of academic plans, a School Administrator can only assign to a student [p. 105] an academic plan designated as the default by the District Administrator.

The District Administrator can designate only one academic plan as the district default. Typically, this plan has one or more versions that cover all potentially relevant years. When a School Administrator assigns the default plan to a student, PowerSchool SMS automatically assigns the appropriate plan version. PowerSchool SMS determines the plan version to assign based on the start and end year of the plan version and the year the student entered Grade 9. For example, if a student entered Grade 9 in 2007, PowerSchool SMS would assign a plan version that contained that year.

Note: To determine the plan version to assign to a student, PowerSchool SMS refers to the student's record, specifically, the **Year/Date entered 9th grade** field on the Student Demographics > Personal Info page [p. 60]. If this field is blank or is a non-numeric value, PowerSchool SMS uses the student's historical data to calculate the year the student entered 9th grade. If the student's historical information is inadequate, then PowerSchool SMS uses to the student's current year grade level to determine the student's year of entry into Grade 9. Note: PowerSchool SMS calculates grade levels based only on numeric values; it cannot determine a year of entry into Grade 9 using grade levels such as G9, G10, and so on. (To enter a value for **Year/Date entered 9th grade** for more than one student, select the students [p. 37] and in the **Edit** menu click **Assign > Values**.)

To designate a plan version as a district default:

1   In the **Admin** menu, click **District Setup**. The District Setup page appears.
2   Under **Academic Planner**, click **Plan Setup**. The Academic Plans page appears.
3   Click **Set Default**. A dialog appears.
4   For **Plan name**, select an academic plan.
    • To have no academic plan designated as the default, select "None".
5   Click **OK**. PowerSchool SMS indicates the default plan [*Figure 131*].

Developing reports

You can develop reports for use in a PowerSchool SMS system [p. 114] using a third-party development tool such as *Crystal Reports*®. For more information about developing new reports for specific purposes, refer to the *Report Writers Guide*.

Scheduling

Scheduling involves specifying how courses or subjects are offered at a school [p. 280], defining scheduling elements [p. 307] and structure [p. 356], assigning teachers and rooms to courses or subjects, and creating student schedules [p. 332]. Students at a school may be able to make course requests [p. 108].

Scheduling at an elementary school [p. 282]differs significantly from a secondary school. Refer to the following topics:

- *Scheduling an elementary school* [p. 282]
- *Scheduling a secondary school* [p. 285]

These scheduling procedures have some tasks in common, including setting up a scheduling structure [p. 356].

Scheduling method

An administrator can set up a school to use one of two types of scheduling: elementary or secondary. For a description of the main differences between the two methods, refer to *Table 55* [p. 280].

Table 55: **Elementary versus secondary scheduling method**

Elementary scheduling [p. 282]	Secondary scheduling [p. 285]
Structured around *homerooms* [p. 202]. • Every student is assigned to a homeroom. • Based on his or her homeroom, PowerSchool SMS assigns a student to core set of classes. • The students from a homeroom usually stay together for most of each day. • The homeroom teacher teaches most of the subjects to the same group of students. Scheduling: • The administrator can adjust individual student schedules by transferring them to other classes [p. 333], as well as by using subject exceptions and resource assignments to support special cases. • The administrator has the option of creating a schedule structure [p. 356] and assigning meeting patterns to classes.	Structured around classes. • For each class, students usually go to a different room with different students. • The homeroom, if used, is usually only for announcements.
Students in a grade level are usually assigned the same set of subjects, which they take for the whole school year.	Offers flexible terms that support any combination of semesters, quarters, or middle-school style class rotations. • Requires complex meeting patterns. • Requires different bell schedules, or different start and end dates, for each term to accommodate the needs of different groups of students. • *Teams* or *platoons* of students are rotated through a series of *exploratory classes* (middle school).

Elementary scheduling [p. 282]	Secondary scheduling [p. 285]
Structured around *subjects* and a *subject framework* [>>] • Subjects are offered as core or specialty.	Structured around *courses* and a *course catalog* or *course list*. • Students request individual courses. • Courses are offered as required or elective.
Simple grading structure	Complex grading structure • A school that employs secondary scheduling must also employ secondary grading and secondary report cards.
Employs the elementary school style of report card. • Includes grading table options.	Employs the secondary school style of report card. • Includes grading table options.
Employs the once-daily or twice-daily attendance method [p. 181].	Employs the once-daily, twice-daily, or by-class attendance method [p. 181].

To set a scheduling method for a school: [SA][1]

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.
2 Under **School**, click **General Settings**. The General Settings page appears.
3 Under **Scheduling General Settings**, select the check box of the scheduling method you want to use: **Elementary**, or **Secondary**.
   • Elementary is not available in the Planning Calendar if the school used Secondary scheduling in the Active Calendar.
   • Specify where PowerSchool SMS should consider two contiguous classes as one [p. 280].
4 Click **OK**.
   • Caution: To change the scheduling method in a calendar, a School Administrator must do so before making any changes to the default scheduling settings (for example, by creating schedules). Otherwise, the change in method is not possible.

Table 56: **Permissions pertaining to setting a scheduling method**

To	You need this permission	Set to	Details
Setting a scheduling method for a school	**School Setup > Attendance General Settings**	Yes	[>>]

Two classes treated as one

Where a school's attendance-taking method is By Class [p. 181], the administrator can specify the circumstances in which PowerSchool SMS should consider a pair of contiguous classes (that is, two classes scheduled into adjacent periods) to be the same class; for example, a chemistry lecture followed by a chemistry lab. This specification affects PowerSchool SMS's calculation of attendance [p. 159] and instructional minutes.

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[1]You can do this if your role is School Administrator.

PowerSchool SMS considers two classes to be one where all of the following are true:

- The classes are scheduled for consecutive periods.
- Both classes have the same name. For example, PowerSchool SMS will consider the classes "Chemistry" and "Chemistry Lab" as separate and the classes named "Science" as potentially a single class.
- The number of *passing period* minutes between the two consecutive classes does not exceed the number specified by the administrator. For example, if the School Administrator sets the passing period minutes to 8 and the school allows 5 minutes between classes, then PowerSchool SMS will consider two consecutive classes of the same name as one (5 is less than 8); if the school's bell schedule specifies 10 minutes between classes, then PowerSchool SMS will consider the two classes as separate (10 is more than 8).

To specify the maximum number of passing period minutes between contiguous classes for those classes to be considered one class: [SA][1]

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.
2 Under **School**, click **General Settings**. The General Settings page appears.
3 Under **Scheduling General Settings**, for **Class periods are contiguous if separated by no more than # passing period minutes**, specify the number of minutes.
4 Click **OK**.
   - Caution: The administrator cannot change this setting once attendance has been taken in this calendar year.

Scheduling an elementary school

Typically, a School Administrator creates an elementary school's initial schedule in the Planning Calendar [p. 172]. At year end [p. 434], the Planning Calendar becomes the Active Calendar [p. 172] and the administrator continues to make adjustments to the school schedule throughout the school year. Some scheduling tasks, such as setting up resource services and a resource roster, can only be completed in the Planning Calendar and others can only be completed in the Active Calendar thus the administrator may need to switch between them [p. 171].

For the purposes of elementary scheduling, the following terms are useful:

- *Homeroom*: A group of students, usually in the same grade, who spend most of their time together. In a homeroom, students have attendance taken and receive instruction in core subjects, such as Math, Language Arts, and Social Studies. For example, Homeroom 1-A is a Grade 1 homeroom where twenty-five Grade 1 students spend most of their time.

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[1]You can do this if your role is School Administrator.

- *Class*: A group of students who meet regularly to receive instruction in a subject from a specific teacher. For example, Band 4 meets Tuesdays and Thursdays at 2 p.m. with Mr. Bell providing instruction for thirty Grade 4 students.
- *Subject* see *Set up a subject framework for an elementary school* [p. 307]
- *Room*: Specifies the location of classes not taught in the homeroom. Typically, in elementary schools, classes are taught in the homeroom. If a class is not taught in the homeroom, you can specify a different room. For example, all computer classes are taught in the computer lab in room 102.

The general scheduling setup procedure is as follows:

1 *Set up scheduling elements* [p. 307] (required)
2 *Set up a subject framework for an elementary school* [p. 307]
3 *Set up multiple tracks* [p. 308]
4 *Set up homerooms* [p. 202]
5 *Configure student loading rules* [p. 310]
6 *Set subject scheduling rules for an elementary school* [p. 322]
7 *Set up classes for an elementary school* [p. 325]
8 *Student schedule creation for an elementary school* [p. 332]
9 *Assign resource services* [p. 354]

If it is a requirement that an elementary school track instructional minutes or create multiple tracks [p. 308], the School Administrator sets up a scheduling structure; this involves the following:

- *Defining scheduling groups* [p. 357]
- *Defining day patterns and Special Days* [p. 360]
- *Setting up bell schedules* [p. 364]
- *Setting up meeting patterns* [p. 367]
- *Applying a constraint* [p. 316]

Keep in mind:

- Every student in an elementary school must be assigned to a homeroom [p. 332]. A student's current grade level must match a grade level assigned to his or her homeroom.
- The administrator can choose to automatically assign subjects to a student, based on the student's grade level [p. 322]. As a result, all students in a particular grade receive instruction in the core subjects associated with that grade, such as Language Arts, Math, and Social Studies. A subject can be taught either in the homeroom or in a different room. For example, multiple homerooms in a grade can be scheduled to take Grade 5 PE together, which is taught in the Gymnasium.
- The administrator can automatically assign a student to classes based on that student's homeroom [p. 322]. For example, the administrator can designate Social Studies 4 as a subject whose classes correspond to specific homerooms. As a result, students in Homeroom 4-A are automatically assigned to the Social Studies 4 (4-A) class.

- The administrator can create enough classes to accommodate all the students in a grade who are taking a particular subject. For example, if there are ninety students in Grade 3 who are taking Computer Applications and the administrator wants to limit the class size to fifteen students, he or she can create six classes.
- Students automatically receive a schedule of most of their core and specialty subjects (also known as non-academic subjects), based on the homeroom and grade assignment. The administrator can adjust class rosters to accommodate exceptions, such as team teaching [p. 329].

Table 57: Permissions pertaining to elementary scheduling

To	You need this permission	Set to	Details
Switch between calendars.	**School Setup > Define School Calendar**	Yes	[p. 717]
Specify calendar day exceptions and Special Days for the Active Calendar.	**School Setup > Calendar Day Exceptions**	Delete	[p. 709]
Create and edit day types.	**School Setup > Day Type Setup List**	Yes	[p. 714]
View the subject framework.	**School Setup > Subject Framework / Course Catalog**	View	[p. 729]
Schedule core and specialty subjects.	**School Setup > Subject Scheduling**	Edit	[p. 730]
	School Setup > Subject Framework / Course Catalog	View or Edit	[p. 729]
Add, edit, and delete buildings.	**Facilities Management > Buildings**	Delete	[p. 668]
	School Setup > Secondary Scheduling Setup	Yes	[p. 726]
Add, edit, and delete rooms.	**Facilities Management > Rooms**	Delete	[p. 668]
	School Setup > Secondary Scheduling Setup	Yes	[p. 726]
Set up the scheduling structure.	**School Setup > Secondary Scheduling Structure Setup**	Yes	[p. 727]
Define schedules for classes.	**School Setup > Classes**	Yes	[p. 711]
	School Setup > Secondary Scheduling Setup	Yes	[p. 726]
Define class or homeroom constraints.	**School Setup > Define Constraints - School**	Delete	[p. 714]
Schedule a student into a class for which the student exceeds the constraints.	**School Setup > Override Constraints**	Yes	[p. 724]
Assign default classes based on student homerooms.	**School Setup > Subject Scheduling**	Edit, Delete, or None	[p. 730]

To	You need this permission	Set to	Details
	Students > Edit Student Schedules	Yes	[p. 776]
Re-assign default classes based on student homerooms.	**School Setup > Subject Scheduling**	Edit	[p. 730]
	Students > Edit Student Schedules	Yes	[p. 776]
Create resource services.	**School Setup > Resource Services**	Delete	[p. 726]
Update the scheduling statistics.	**School Setup > Change Planning Schedule**	Yes	[p. 710]
Assign resource services to students.	**Students > Resource Assignments**	Delete	[p. 784]
	Students > Edit Student Schedules	Edit	[p. 776]
Set up homerooms for scheduling.	**School Setup > Homerooms**	Delete	[p. 722]
Assign homerooms to students.	**Students > Assign Homerooms**	Yes	[p. 767]
Make changes to student schedules.	**Students > Edit Student Schedules**	Yes	[p. 776]

Scheduling a secondary school

At a secondary school, the School Administrator can assign each student to a homeroom. That student, however, would spend only a short period in her homeroom each day. For each class, a student goes to a different room with a different group of students for each course in her personal schedule.

For a student to have a personal schedule, the student requests courses from a list published by the school [p. 347] of required and elective course offerings (at a middle school, the school defines team loading rules for classes and teachers that keeps groups of students together for some or all courses). Based on student course requests, staffing, and facilities, the School Administrator creates a number of classes or sections for each course. This enables the administrator to build a master schedule to schedule classes into terms, meeting patterns, rooms, and teachers [p. 342]. Finally, based on student course requests and teacher preferences, the administrator has PowerSchool SMS generate teacher and student schedules, which can be printed and distributed to students and teachers.

Typically, a School Administrator creates a secondary school's initial schedule in the Planning Calendar [p. 172]. At year end [p. 434], the Planning Calendar becomes the Active Calendar [p. 172] and the administrator continues to make adjustments to the school schedule throughout the school year [p. 333]. Once a school year is under way, it is possible for the School Administrator to engage in some of these scheduling tasks in the Active Calendar. In the Active Calendar, the administrator can perform the tasks as necessary — no particular order is required. In the Active Calendar, the administrator can also define resource services [p. 354] and assign resource assignments [p. 354].

Based on student course requests, a school determines how many classes of each course need to be offered in a given school year. The School Administrator schedules these classes into terms with meeting patterns,

teachers, and rooms. These elements constitute the school's master schedule.

The general scheduling procedure for a secondary school is as follows (in the Planning Calendar):

1 *Ensure that rooms are ready* [p. 289]
2 *Ensure that the school course catalog is ready* [p. 289]
3 *Set up a planning schedule* [p. 303]
4 *Set up a schedule structure* [p. 356]
5 *Set up multiple tracks* [p. 308]
6 *Configure student loading rules* [p. 310]
7 *Assign default terms and meeting patterns to classes* [p. 340]
8 *Build the school's master schedule* [p. 342]
9 *Recording student course requests* [p. 347]
10 *Load student schedules* [p. 353]
11 *Select the planning schedule that will become active when YEP is run* [p. 356]

For the purposes of secondary scheduling, the following terms are useful:

- *Homeroom*: At a secondary school, the School Administrator can assign each student to a homeroom. The student, however, may spend only a short period in her homeroom each day. For each class, a student goes to a different room with a different group of students for each course in her personal schedule. A homeroom is a type of scheduling group.

- *Class*: A group of students who meet regularly to receive instruction from a specific teacher. For example, Band 10 meets Tuesdays and Thursdays at 2 pm with Mr. Bell providing instruction for thirty Grade 10 students. A class is a type of scheduling group.

- *Course*: A set of classes devoted to a particular area of study.

- *Period*: A time slot on a particular day in which a class may be held.

- *Room*: Specifies the location of classes not taught in the homeroom. Typically, in a secondary school, classes are taught in a room other than the homeroom.

- *Class schedule*: The set of one or more terms, meeting patterns, teachers, and rooms in which a class is scheduled to meet.

- *Term set*: One or more terms. A school year can consist of one or more terms. The administrator can define any number of term sets and name them as he sees fit.

Table 58: **Permissions pertaining to secondary scheduling**

To	You need this permission	Set to	Detail
Assign classes to students, teachers and rooms	**School Setup > Assign Classes**	Yes	[>>]
Assign courses to students	**School Setup > Assign Course Requests**	Yes	[>>]
Create resource services	**School Setup > Resource Services**	Delete	[>>]

To	You need this permission	Set to	Detail
Assign resource services to students.	**Students > Resource Assignments**	Delete	[>>]
Set up or change the school schedule	**School Setup > Secondary Scheduling Setup**	Yes	[>>]
View your school schedule	**School Setup > Subject Framework / Course Catalog**	View or Edit	[>>]
	School Setup > Subject Scheduling	View or Edit	[>>]
Add, edit, and delete buildings	**Facilities Management > Buildings**	Delete	[>>]
	School Setup > Secondary Scheduling Setup	Yes	[>>]
Add, edit, and delete rooms	**Facilities Management> Rooms**	Delete	[>>]
	School Setup > Secondary Scheduling Setup	Yes	[>>]
Create and schedule reservation labels	**School Setup > Secondary Scheduling Setup**	Yes	[>>]
Create and edit meeting patterns	**School Setup > Secondary Scheduling Structure Setup**	Yes	[>>]
Define class constraints	**School Setup > Define Constraints - School**	Delete	[>>]
Add, delete, or switch planning schedules	**School Setup > Change Planning Schedule**	Yes	[>>]
Update scheduling statistics	**School Setup > Change Planning Schedule**	Yes	[>>]
Create student schedules, including adding and removing course requests	**Students > Edit Student Schedules**	Yes	[>>]
Schedule walk-in students	**Students > Edit Student Schedules**	Yes	[>>]
Assign default classes based on student homerooms	**School Setup > Subject Scheduling**	Edit, Delete, or None	[>>]
	Students > Edit Student Schedules	Yes	[>>]
Reassign default classes based on student homeroom	**School Setup > Subject Scheduling**	Edit, Delete, or None	[>>]
	Students > Edit Student Schedules	Yes	[>>]
Assign students to classes when doing so results in the class size exceeding the specified capacity	**School Setup > Classes**	Yes	[>>]

To	You need this permission	Set to	Detail
Transfer grades from a dropped class to an added class	**Grading > Transfer Grades and Attendance**	Yes	[>>]
	Students > Edit Student Schedules	Yes	[>>]
Delete grades entered for a dropped class	**Grading > Transfer Grades and Attendance**	Yes	[>>]
	Grading > Enter Grades for All Classes	Yes	[>>]
	Grading > Edit Grades from Other Teachers	Yes	[>>]
	Grading > Modify Grades for Completed Periods	Yes	[>>]
	Students > Edit Student Schedules	Yes	[>>]
Reassign attendance for transferred classes	**Grading > Transfer Grades and Attendance**	Yes	[>>]
	Students > Edit Student Schedules	Yes	[>>]
Delete attendance for dropped classes	**Grading > Transfer Grades and Attendance**	Yes	[>>]
	School Setup > Clear Attendance	Yes	[>>]
	Students > Edit Student Schedules	Yes	[>>]
View grade transfers and attendance reassignments in the Audit Log	**School Setup > View Audit Log**	Yes	[>>]

Typical scheduling timetable

When scheduling a school year, we recommend that the administrator plan to complete the necessary tasks in the appropriate order and at the necessary times of the school year. *Table 59* [p. 288] provides an example of a typical timetable for scheduling at a school where the school year runs from September to June.

Table 59: Scheduling timetable example

Time Period	District activity	School activity
January	Ensure that the district's course catalog is up to date and available to school [p. 289].	Publish the school course catalog [p. 289].
February to March		Enter student course requests [p. 347]. Distribute course request confirmations to students.
April		Build the master schedule [p. 342]. Load student schedules [p. 353].
May to June		Distribute student schedules to students [xref].
May to August	Set the coming school year's start and end dates [p. 356]. Ensure that school boundaries [p. 258] and the Projected Schools Map is up to date [p. 151].	Manually adjust the master schedule in the Planning Calendar [p. 172]. Manually adjust student schedules in the Planning Calendar [p. 172].

Time Period	District activity	School activity
July to August	Perform year-end tasks [p. 434].	Perform year-end tasks [p. 434].
August to the following June		Manually adjust student schedules in the Active Calendar [p. 172]. Manually adjust the master schedule in the Active Calendar [p. 172].

Ensure that rooms are ready

[Applies to **elementary** [p. 282] and **secondary** [p. 285] school scheduling.]

Typically, the School Administrator sets up rooms [p. 201] in the system when he first sets up the school. Thereafter, the administrator keeps these up to date with occasional additions, deletions, and modifications. To ensure that rooms are ready for scheduling, we recommend that the School Administrator pay particular attention to scheduling properties. **Note**: Any changes to rooms take effect in both the Planning [p. 172] and Active Calendars [p. 172].

The School Administrator can work with rooms from the Scheduling page.

To set up a room: [SA][1]

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2 Under **Step 1**, click **Room Setup**. The Buildings page appears.
3 Under **# Rooms**, click the number of rooms in the building. The Rooms page appears.
4 Work with the rooms [see *Room setup* p.201].

Ensure that the school course catalog is ready

[Applies to **elementary** [p. 282] and **secondary** [p. 285] school scheduling.]

The district course catalog defines the courses available for scheduling in schools.

To update the course catalog for the next year [DA][2]:

1 In the Planning Calendar, In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Click **Course Catalog**. The Course Catalog Home page appears.
3 Use the following links to adjust course setup lists for both the active and Planning Calendars:
   • **PowerSchool SMS Subject Area**
   • **PowerSchool SMS Course Type**
   • **PowerSchool SMS Department**
   • **PowerSchool SMS Room Type**
4 Use the following links to adjust the catalog for the next year:

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[1]You can do this if your role is School Administrator.
[2]You can do this if your role is District Administrator.

- Subject Framework
- **Courses** see *Setting course properties* [p. 290]
- Constraints (Elementary)
- **Constraints (Secondary)**

Setting course properties

The District Administrator sets the properties of each course, such as its name, applicable grade levels, course load value, and the maximum number of students allowed per class. A School Administrator can adjust some of these properties for a course available to his school.

To adjust a course's properties: [DA][1]

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Click **Course Catalog**.
3 Click **Courses**. The Course List page appears displaying a list of the courses available to schools in the district.
   - To include inactive courses in the list, in the **Edit** menu, select **Show Inactive Courses**.
   - Alternatively, in the **Course Search** section, you can use a **Basic** or **Detail** search to generate a relevant list of courses from the district's course catalog. PowerSchool SMS runs the search and displays matching courses (if any) under **Search Results**.
     - Perform the search using the same methods as a Basic [p. 40] or Detail [p. 42] search for students. You can save the results of a search, or save the search criteria for re-use as a *favorite search*.
     - Course name is case insensitive (that is, entering english for the course name will produce courses named English and english).
4 In the **Search Results** section, under **Number**, click a course's number to view its properties. The Course Detail page appears.
5 In the control bar, click the course property you want to view or work with:
   - **Course Detail** [p. 290]
   - **Course Scheduling** [p. 291]
   - **Course Grading** [p. 289]
   - **School Assignment** [p. 289]
6 On each page, click *Save*.
   - Click **Reset** to restore the properties to the district's values.

Course detail information includes:

- **Course number**: The course number must be unique in the district. The course number can contain alphabetic characters, for example, "101A". **Caution**: Once assigned and saved, the District Administrator cannot change this number.
- **Course state number**: A state-assigned number, if required.
- **Course name**: A descriptive name for the course.
- **Course short name**: An abbreviated name, up to 10 characters long, for the course.
- **Course alternate name**: An optional alternate to the course name.

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[1]You can do this if your role is District Administrator.

- **Course description**: A short description of course.
- **Course subject area**: The applicable subject area, as selected from those set up for the district.
- **Course type**: The applicable type of course as selected from those set up for the district.
- **Recommended grade levels**: The grade levels appropriate for this course.
- **Course Is**: Indicates that the course is one of the following: **Required**, **Elective**, or **Study hall**. A course designated "Study hall" cannot have grades collected for it.
- **Collect Attendance**: Indicates that attendance is taken for the course.

Course scheduling information includes:

- **Scheduling load**: The value used to determine whether the student has a full course load for the year. This value is also used to determine a teacher's scheduling load. The total scheduling load for a student or teacher cannot exceed 99.99.
- **Maximum students / Minimum students / Optimal students**: The maximum, minimum, and optimal number of students that a class for this course should have. The District Administrator sets these values. A School Administrator can change these values for the purposes of his school's Planning Calendar.
- **Prerequisites**: Prerequisite courses as set for the district.
- **Corequisites**: Corequisite courses as set for the district.
- **Room required**: Select to indicate the **Preferred room type(s) or Preferred room**. When the Master Schedule Builder creates classes for this course, it assigns those classes to rooms according to these preferences. **Note**: The School Administrator makes this selection for her school.

   The vertical order of the rooms in the **Selected** list determines the priority, where the top room has the highest.

To change a course's Maximum students / Minimum students / Optimal students values [SA][1]:

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2 Click **Course Request Tally**. The Course Request Tally page appears.
3 In the **Course Search** section, click **Display All Records**.
   - Or, use a **Basic** [p. 40] or **Detail** [p. 42] search to generate a relevant list of courses from the district's course catalog. PowerSchool SMS runs the search and displays matching courses (if any) under **Search Results**.
4 Locate the course.
5 In the **Opt Size** column, enter a new value.

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[1]You can do this if your role is School Administrator.

- To view the **Min Size** and **Max Size** columns and change those values, in the **Edit** menu select **Choose Columns...** and move these columns to the **Selected Columns** lists.

6   Click *Save*.

Assign subjects and courses to schools

In the Planning Calendar [p. 172], the District Administrator can adjust the assignment of specific subjects to each elementary school and the assignment of courses to each secondary school, before making the district course catalog available to schools.

Make the district course catalog available to schools

When the District Administrator has fully prepared the Planning Calendar [p. 172], he or she *publishes* the course list for use by secondary schools and the subject framework for use by elementary schools. Publishing these items makes the course catalog available to School Administrators. The availability of this information enables the School Administrator to schedule classes for the district's courses.

Caution: After the District Administrator publishes the course catalog, changes to that catalog are limited to the following:

- Add a new course or subject: The course is available to a school as soon as it is assigned to it — the District Administrator does not need to publish the course list again.
- Copy information between course levels.
- Unassign a course or generic subject at a school: Only if the course is not scheduled.
- Change a course's prerequisite or corequisite: The change affects only course requests and schedules made after the change, not course requests and schedules made before the change.
- Change a course: The District Administrator can change a course if the change is logical and would not damage existing use of the course. For example, you cannot stop collecting grades for a course if it is being used in a GPA definition.
- Change a grade level assigned to a generic subject: Only if that course is unassigned from all schools.

To publish the district course catalog: [DA][1]

1   In the Planning Calendar, In the **Admin** menu, click **District Setup**. The District Setup page appears.
2   Click **Next Year Preparation**. The Next Year Preparation page appears.
3   Under **Step 3**, click **Publish Calendar Items**. The Publish Calendar Items page appears.
    - The **Date Published** column indicates if any items have been published.

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[1]You can do this if your role is District Administrator.

4 Under **District Calendar Item**, select the items to publish, which include:
- **Course List**
- **Subject Framework**

5 Click **Publish**.
- Note: PowerSchool SMS can take several hours, even overnight, to publish the selected items to all schools. The time required varies according to the number of courses, subjects, and schools.

Reserving periods for students, teachers, or rooms

A School Administrator can reserve specific periods in the schedule for a students, teachers, or rooms using a *reservation label*. A reservation label works like a course in the scheduling structure. PowerSchool SMS prints reservation labels on schedules.

The School Administrator can assign a reservation label, or she can let the Master Schedule Builder or Student Loader assign the label automatically based on teacher preferences and student course requests. A reservation label does not have a course number and grades and attendance are not collected for it.

PowerSchool SMS provides three types of reservation labels:

- **Teacher**: Reserves a period in a teacher's schedule for an activity such as a preparation period or lunch monitoring session. A teacher reservation label is not available to students to request and the administrator cannot assign one to a student. A Teacher reservation label differs from a teacher time restriction [xref] in that the latter indicates when a part-time teacher is available and PowerSchool SMS does not print a restriction on a schedule.

- **Student**: Reserves a period in a student's or teacher's schedule for an activity such as an early starting time for a school that employs extended days, an extracurricular activity, or a tutoring session.

- **Room**: Reserves a room for a period without assigning teachers or students to that room; for example, to set aside a room for an outside group.

To create a reservation label: [SA][1]

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

2 Click **Course Setup**. The Course List page appears.

3 In the **Actions** menu, select **Add Reservation Label**. The Add/Edit Reservation Label page appears.

4 Set options, which include:
- **Name**: A descriptive name of up to 99 characters.
- **Short Name**: An abbreviated name of up to 11 characters. PowerSchool SMS displays this short name on the screen and in reports. PowerSchool SMS also uses this name as the course number.
- **Type**: Types include:

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[1]You can do this if your role is School Administrator.

- **Teacher**: Indicates that this label can be assigned to a teacher.
- **Student**: Indicates that this label can be assigned to a student, teacher, or room. For this type, the administrator can also specify **Maximum students** / **Minimum students** / **Optimal students**, that is, the maximum, minimum, and optimal number of students that a class for this course should have.
- **Room**: the reservation label can be assigned to rooms only. Once the reservation label type is set, it cannot be changed.
- **Scheduling load**: The value used to determine whether the student has a full course load for the year. This value is also used to determine a teacher's scheduling load. This value can be left at its default: 0.
- **Print on Reports**: Specifies that this reservation label be included in printed reports, such as a teacher or student schedule. The report must be designed to accommodate this information.

5 Click **Save**. The Course List page appears. The new reservation label is listed under the category "Reservation Labels".

6 In the **Number Column**, click the name of the reservation label. The Add/Edit Reservation Label page appears.

7 In the control bar, click **Reservation Offerings**. The Course Offerings page appears.

8 Locate the **Scheduling Group** to apply to this reservation label and select it in the **Default Offering** column.
- (Optional) Select **Allowed Offerings** to enable users to schedule classes manually in different term sets.

9 Under **Meeting Patterns**, specify the meeting patterns available to this label by moving them to the **Selected Patterns** list.
- For a reservation label for a preparation period, consider assigning all the meeting patterns available. This facilitates the automatic assignment of preparation periods.

10 Click **Save**.

Example: Assigning a reservation label for a preparation period

A typical reservation label assigned by a School Administrator is one for a preparation period. The administrator can assign a preparation period to one teacher at a time or have the Master Scheduler automatically assign preparation periods to teachers based on teacher preferences.

To assign a preparation period to a teacher: [SA][1]

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

2 Click **Master Schedule**.

3 Under **By Course**, under **Course Search**, under **Basic**, set up a search for "Course Subject Area equals Reservation Labels". Click **Search**. A list of reservation labels appears under Course Search Results.

---

[1]You can do this if your role is School Administrator.

4 Under **Course Search Results**, for the desired reservation label, click **Add Class**.

5 Select the class to which to assign the reservation label.

6 Under **Class Schedule** (which appears when the class is selected), select the following:
- **Meeting Pattern**
- **Teacher**

7 Click **Save**.

To have PowerSchool SMS automatically assign preparation periods to teachers based on teacher preferences: [SA][1]

1 For each teacher, assign a preference for a preparation period:

    a In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

    b Click **Staff Setup**.

    c Use **Staff Search** to find the teachers to whom you want to assign a preparation period.

    d Under **Search Results**, under **Name**, click the teacher. The Staff Scheduling Properties page appears.

    e Under **Course Search**, under **Basic**, set up a search for "Course Subject Area equals Reservation Labels". Click **Search**. A list of reservation labels appears under Search Results.

    f Under **Search Results**, select the preparation period and click **Add**.

    g Click **OK**.

    h Under **Preferred Courses**, select the preparation period and set its **Preference** to "1".

    i Click **OK**.

2 Create a preparation period class for each teacher who has this reservation label as a preference:

    a In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

    b Click **Course Request Tally**. The Course Request Tally page appears.

    c Under **Course Search**, under **Basic**, set up a search for "Course Subject Area equals Reservation Labels". Click **Search**. A list of reservation labels appears under Search Results.
- For each reservation label, the number under **Prim Reqs** indicates the number of teachers who have the reservation label as a preference.

    d Select the preparation period reservation label.

    e In the **Actions** menu, select **Calculate Classes Needed**. The scheduler creates one reservation label class for each teacher who has the reservation label as a preference.

    f In the **Actions** menu, click **Create Classes**.

    g Click **Save**.

---

[1]You can do this if your role is School Administrator.

3 Allocate preparation period classes to teachers
  a In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
  b Click <u>Teacher Allocations</u>. The Teacher Allocations page appears.
  c Under **Course Search**, under **Basic**, set up a search for "Course Subject Area equals Reservation Labels". Click **Search**. A list of reservation labels and the teachers to whom they are assigned appears under Search Results.
  d Select one or more teachers.
  e In the **Actions** menu, click **Allocate Teachers**.
   • PowerSchool SMS allocates classes proportionately according to each teacher's course preference settings.
   • PowerSchool SMS replaces any existing allocations, except those that are locked.
   • PowerSchool SMS does not automatically allocate a class to a teacher with a preference of 9. 9 is a special setting for the purpose of holding a teacher as a spare.
  f Click **Save**.
4 Schedule a preparation period class:
  a In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
  b Click **Master Schedule**.
  c Under **Course Search**, under **Basic**, set up a search for "Course Subject Area equals Reservation Labels". Click **Search**. A list of reservation labels and the classes to which they apply appears under Search Results.
  d Select the class(es) you want to schedule.
  e In the **Actions** menu, click **Schedule Classes...**.
  f Click **Save**.

Example: Using reservation labels to assign a student to an early or late starting time

A School Administrator can use reservation labels to reserve the early or late periods for schools that use extended day patterns. In this example, the administrator assigns to one or more students either an early start or a late start. This involves setting up a meeting pattern to reserve the first three periods of each day and another meeting pattern to reserve the last three periods of each day. This setup enables the student loader to automatically assign either an early start or a late start to the selected students and prevents the Master Scheduler from scheduling classes during the reserved times.

For this example, assume that the school has an eight-period bell schedule and students are required to attend five periods. The school has approximately 1000 students.

To assign a student to an early or late starting time: [SA][1]

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[1]You can do this if your role is School Administrator.

1 Create early start and late start meeting patterns:
   a In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
   b Click **Meeting Patterns**. The Meeting Patterns page appears.
   c In the **Actions** menu, select **Add Meeting Pattern**. The Add Meeting Pattern page appears.
   d Create two meeting patterns using the following settings:
      * **Meeting pattern name** = "Reserve - am", **Short name** = "RAM", periods 1, 2, and 3 for each day in the day pattern
      * "Reserved - pm", "RPM", periods 6, 7, and 8 for each day in the day pattern.
2 Create two reservation labels: one for the early start and one for the late:
   a In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
   b Click **Course Setup**. The Course List page appears.
   c In the **Actions** menu, select **Add Reservation Label**. The Add/Edit Reservation Label page appears.
   d Set options, which include:
      * **Name**: Early Start
      * **Short Name**: ES
      * **Type**: Student
      * **Scheduling Load**: 0
      * **Maximum Students**: 525
      * **Minimum Students**: 475
      * **Optimal Students**: 500
      * **Print on Reports**: Not selected
   e Click **Save**. The Course List page appears. The new reservation label is listed under the category "Reservation Labels".
   f In the **Actions** menu, select **Add Reservation Label**. The Add/Edit Reservation Label page appears.
   g Set options, which include:
      * **Name**: Late Start
      * **Short Name**: LS
      * **Type**: Student
      * **Scheduling Load**: 0
      * **Maximum Students**: 525
      * **Minimum Students**: 475
      * **Optimal Students**: 500
      * **Print on Reports**: Not selected
   h Click **Save**. The Course List page appears. The new reservation label is listed under the category "Reservation Labels".
   i In the **Number Column**, click the reservation label "ES". The Add/Edit Reservation Label page appears.
   j In the control bar, click **Reservation Offerings**. The Course Offerings page appears.

k Locate the **Scheduling Group** to apply to this reservation label and select it in the **Default Offering** column.

l Under **Meeting Patterns**, make the "Reserve - pm" meeting pattern available to this label by moving it to the **Selected Patterns** list.

m Click **Save**.

n In the **Number Column**, click the reservation label "LS". The Add/Edit Reservation Label page appears.

o In the control bar, click **Reservation Offerings**. The Course Offerings page appears.

p Locate the **Scheduling Group** to apply to this reservation label and select it in the **Default Offering** column.

q Under **Meeting Patterns**, make the "Reserve - am" meeting pattern available to this label by moving it to the **Selected Patterns** list.

r Click **Save**.

3 Assign the Early Start reservation label to a student:

a View a list of all students [p. 40].

b On the Student Search page, under **Student Search Results**, select the student(s).

c In the **Actions** menu, select **Assign > Course Requests**. The Assign Requests page appears.

d Under **Course Search**, under **Basic**, set up a search for "Course Subject Area equals Reservation Labels". Click **Search**. A list of reservation labels appears under Course Search Results.

e Select the reservation label "Early Start" and click **Add Request**.

f Click **Apply**.

4 Assign meeting patterns:

a In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

b Click **Course Request Tally**. The Course Request Tally page appears.

c Under **Course Search**, under **Basic**, set up a search for "Course Subject Area equals Reservation Labels". Click **Search**. A list of reservation labels appears under Search Results.

- For each reservation label, the number under **Prim Reqs** indicates the number of teachers who have the reservation label as a preference.

d Select the reservation labels "Early Start" and "Late Start".

e In the **Actions** menu, select **Calculate Classes Needed**.

f In the **Actions** menu, click **Create Classes**.

g Click **Save**.

h In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

i Click **Master Schedule**. The Master Schedule page appears.

j Under **Course Search**, under **Basic**, set up a search for "Course Subject Area equals Reservation Labels". Click

Search. A list of reservation labels appears under Search Results.

  k Select the class "Early Start-1".
  l Under **Class Schedule** (which appears when the class is selected), for **Meeting pattern**, select "RAM".
  m Click **Save**.
  n Select the class "Late Start-1".
  o Under **Class Schedule** (which appears when the class is selected), for **Meeting pattern**, select "RPM".
  p Click **Save**.
5 Load student schedules [p. 353].

Example: Using reservation labels to have students automatically assigned to early or late starting times

A School Administrator can use reservation labels to reserve the early or late periods for schools that use extended day patterns. In this example, the administrator sets up PowerSchool SMS to have the student loader to automatically assign either an early start or a late start to the selected students and prevent the Master Scheduler from scheduling classes during the reserved times. This involves setting up a meeting pattern to reserve the first three periods of each day and another meeting pattern to reserve the last three periods of each day.

For this example, assume that the school has an eight-period bell schedule and students are required to attend five periods. The school has approximately 1000 students and wants half scheduled for early classes and half scheduled for late classes.

To have students automatically assigned to early or late starting times: [SA][1]

1 Create early start and late start meeting patterns:
  a In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
  b Click **Meeting Patterns**. The Meeting Patterns page appears.
  c In the **Actions** menu, select **Add Meeting Pattern**. The Add Meeting Pattern page appears.
  d Create two meeting patterns using the following settings:
   • **Meeting pattern name** = "Reserve - am", **Short name** = "RAM", periods 1, 2, and 3 for each day in the day pattern.
   • "Reserved - pm", "RPM", periods 6, 7, and 8 for each day in the day pattern.
2 Create a reservation label to be used to reserve either the first three or last three periods of the day for each student:
  a In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
  b Click **Course Setup**. The Course List page appears.

---

[1]You can do this if your role is School Administrator.

c In the **Actions** menu, select **Add Reservation Label**. The Add/Edit Reservation Label page appears.

d Set options, which include:
- **Name**: Do Not Schedule
- **Short Name**: DNS
- **Type**: Student
- **Scheduling Load**: 0
- **Maximum Students**: 525
- **Minimum Students**: 475
- **Optimal Students**: 500
- **Print on Reports**: Selected

e Click **Save**. The Course List page appears. The new reservation label is listed under the category "Reservation Labels".

f In the **Number Column**, click the reservation label "DNS". The Add/Edit Reservation Label page appears.

g In the control bar, click **Reservation Offerings**. The Course Offerings page appears.

h Locate the **Scheduling Group** to apply to this reservation label and select it in the **Default Offering** column.

i Under **Meeting Patterns**, make the "Reserve - am" and "Reserve - pm" meeting patterns available to this label by moving them to the **Selected Patterns** list.

j Click **Save**.

3 Assign the reservation label to students:

a View a list of all students [p. 40].

b On the Student Search page, under **Student Search Results**, select the student(s).

c In the **Actions** menu, select **Assign > Course Requests**. The Assign Requests page appears.

d Under **Course Search**, under **Basic**, set up a search for "Course Subject Area equals Reservation Labels". Click **Search**. A list of reservation labels appears under Course Search Results.

e Select the reservation label "Do Not Schedule" and click **Add Request**.

f Click **Apply**.

4 Create reservation label classes:

a In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

b Click **Course Request Tally**. The Course Request Tally page appears.

c Under **Course Search**, under **Basic**, set up a search for "Course Subject Area equals Reservation Labels". Click **Search**. A list of reservation labels appears under Search Results.

d Select the reservation label "Do Not Schedule".

e For this label, under **Classes Needed**, enter 2.

f In the **Actions** menu, click **Create Classes**.

g Click **Save**.

5 Assign meeting patterns:

    a In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

    b Click **Master Schedule**. The Master Schedule page appears.

    c Under **Course Search**, under **Basic**, set up a search for "Course Subject Area equals Reservation Labels". Click **Search**. A list of reservation labels appears under Search Results.

    d Select the class "Do Not Schedule-1".

    e Under **Class Schedule** (which appears when the class is selected), for **Meeting pattern**, select "RAM".

    f Click **Save**.

    g Select the class "Do Not Schedule-2".

    h Under **Class Schedule** (which appears when the class is selected), for **Meeting pattern**, select "RPM".

    i Click **Save**.

6 Load student schedules [p. 353].

    • PowerSchool SMS distributes the selected students equally into the two "Do Not Schedule" classes and does not schedule other classes during the reserved periods.

Example: Setting up a reservation label for a student-teacher meeting

A School Administrator can use a reservation label to reserve time for student-teacher meetings, such as tutoring or special assistance, for which attendance and grades are not recorded.

In this example, the administrator creates a Math Assistance session in which a teacher provides additional math instruction to a small group of students. The Math Assistance session employs a meeting pattern created for other courses. The administrator assigns the reservation label directly to both a teacher's and student's schedules.

To employ a reservation label for a Math Assistance tutoring session: [SA][1]

1 Create a reservation label to be used for the tutoring session:

    a In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

    b Click **Course Setup**. The Course List page appears.

    c In the **Actions** menu, select **Add Reservation Label**. The Add/Edit Reservation Label page appears.

    d Set options, which include:

        • **Name**: Math Assistance

        • **Short Name**: Math Asst.

        • **Type**: Student

        • **Scheduling Load**: 0.5

        • **Maximum Students**: 5

        • **Minimum Students**: 1

---

[1]You can do this if your role is School Administrator.

- **Optimal Students**: 3
- **Print on Reports**: Selected

e   Click **Save**. The Course List page appears. The new reservation label is listed under the category "Reservation Labels".

f   In the **Number Column**, click the reservation label "Math Asst.". The Add/Edit Reservation Label page appears.

g   In the control bar, click **Reservation Offerings**. The Course Offerings page appears.

h   Locate the **Scheduling Group** to apply to this reservation label and select it in the **Default Offering** column.

i   Under **Meeting Patterns**, make one or more meeting patterns available to this label by moving them to the **Selected Patterns** list.

j   Click **Save**.

2   Assign the Math Assistance reservation label to a teacher and room:

a   In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

b   Click **Master Schedule**.

c   Under **By Course**, under **Course Search**, under **Basic**, set up a search for "Course Subject Area equals Reservation Labels". Click **Search**. A list of reservation labels appears under Course Search Results.

d   Under **Course Search Results**, for the reservation label "Math Assistance", click **Add Class**.

e   Select the class to which to assign the reservation label.

f   Under **Class Schedule** (which appears when the class is selected), select the following:
- **Meeting Pattern**
- **Teacher**
- **Room**

g   Click **Save**.

3   Assign the Math Asst. reservation label to a student:

a   View a list of all students [p. 40].

b   On the Student Search page, under **Student Search Results**, select the student(s).

c   In the **Actions** menu, select **Assign > Course Requests**. The Assign Requests page appears.

d   Under **Course Search**, under **Basic**, set up a search for "Course Subject Area equals Reservation Labels". Click **Search**. A list of reservation labels appears under Course Search Results.

e   Select the reservation label "Math Assistance" and click **Add Request**.

f   Click **Apply**.

Ensure that staff records are up to date

[Applies to **elementary** [p. 282] and **secondary** [p. 285] school scheduling.]

Typically, the District Administrator sets up a new staff member [p. 261] in the system when she first sets up the school. Thereafter, a School Administrator keeps the staff member's record up to date.

To ensure that staff records are ready for scheduling, we recommend that the School Administrator pay particular attention to their scheduling properties, such as teacher scheduling load and time restrictions [p. 227]. To account for a yet-to-be-identified staff member who will be needed in the school year, the administrator can create one or more staff placeholders [p. 229] and teacher placeholders [p. 374]. **Note**: Any changes to staff take effect in both the Planning [p. 172] and Active Calendars [p. 172].

Set up a planning schedule

[Applies **secondary** [p. 285] school scheduling.]

A School Administrator schedules a school in the planning schedule in the school's Planning Calendar [p. 172].

An elementary school's Planning Calendar has one planning schedule. If the administrator creates a Planning Calendar for an elementary school [p. 282], PowerSchool SMS creates a planning schedule for it. The administrator has the option of copying all the Active Calendar [p. 172] schedule's settings to the planning schedule.

A secondary school's Planning Calendar can have one or more planning schedules, each with its own independent settings. This enables an administrator to try out different schedules for the coming year, each with different teachers, rooms, courses, and classes.

While a secondary school can have more than one planning schedule, only one can be active at any one time [*Figure 136*]. The School Administrator can work with the active schedule, setting such things as meeting patterns, courses, teacher preferences and so on. The administrator can also rename the schedule or delete it. As year end approaches, the administrator must consider which schedule to set as the planning schedule for year-end [*Figure 136*] so that PowerSchool SMS rolls it over [p. 450] as the active schedule for the next school year.

Note: Switching the active planning schedules affects student course requests. PowerSchool SMS copies all the unchanged course requests to the new active planning schedule. Changed course requests are not copied. (This enables the administrator to have different planning schedules with different course requests.)

To set a school's active planning schedule: [SA][1]
1 Ensure that you are in the school's Planning Calendar [p. 171].
2 In the **Admin** menu, click **Scheduling**. The Scheduling page appears [*Figure 136*].
   • **Planning Schedule** indicates the current active planning schedule.

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[1]You can do this if your role is School Administrator.

3   For **Planning Schedule**, select one of the planning schedules
listed.

- Access to this choice depends on the *Change Planning Schedule
permission* [p. 710].
- To change the selected schedule's name or description, in the **Actions**
menu, select **Edit Planning Schedule....**
- To delete the selected schedule, in the **Actions** menu, select **Delete
Planning Schedule....**

Figure 136: Active planning schedule
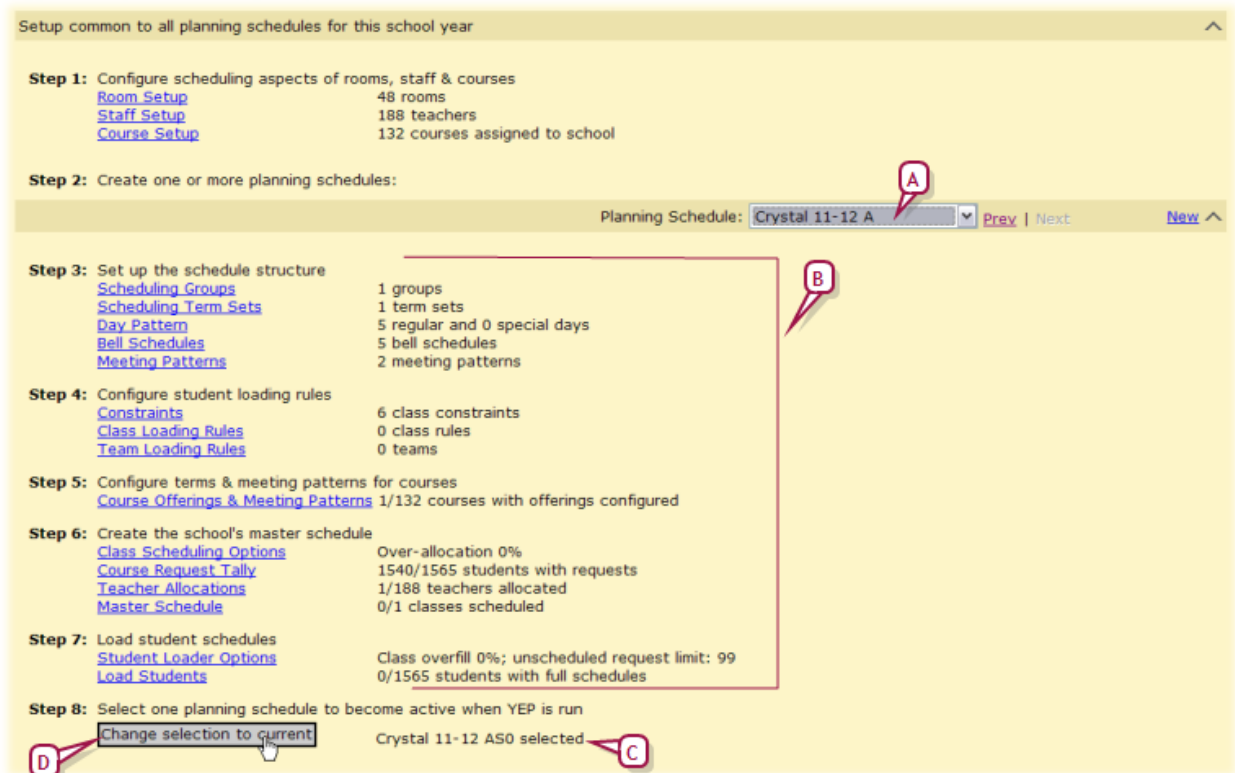
A   **Planning Schedule**: The schedule selected is the active
planning schedule.

B   Active schedule details: The information displayed is for the
active schedule.

C   Planning schedule for year-end: During Year-End Processing
[p. 450], PowerSchool SMS uses this schedule as a basis for
the next year's active schedule.

D   **Change selection to current**: Sets the current active
schedule as the planning schedule for year-end.

Creating a new planning schedule

The administrator can create a planning schedule by creating a blank new
one or copying from an existing schedule. PowerSchool SMS automatically
creates a planning schedule for a secondary school when the School
Administrator creates a Planning Calendar [p. 171].

The administrator can discard changes he or she has made to a planning schedule by creating an entirely new planning schedule. **Note**: At an elementary school, this overwrites the existing planning schedule.

To set up a school's planning schedule: [SA][1]

1 Ensure that you are in the school's Planning Calendar [p. 171].
2 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
   - **Planning Schedule** indicates the current planning schedule.
3 For **Planning Schedule**, click <u>New</u>. The New Planning Schedule page appears.
   - Access to this choice depends on the *Change Planning Schedule permission* [p. 710].
   - Or, in the **Actions** menu, select **Add Planning Schedule...**.
4 For **Copy from schedule**, select an existing schedule from which to copy.
   - You can copy from one of the following schedules:
     - the active schedule in the Active Calendar
     - a historical schedule
     - another planning schedule
   - To create a blank planning schedule, select "None".
5 Select **Elements to copy**. These scheduling elements include:
   - **Course requests**:
     - Where the administrator is copying from the active schedule, PowerSchool SMS copies the course requests.
     - Where the administrator is copying from a historical schedule, PowerSchool SMS does not copy course requests (because old course requests are not useful).
     - Where the administrator is copying from another planning schedule, PowerSchool SMS copies all the course requests in that schedule as well as any course requests that only exist in the active planning schedule.
     - Where the administrator is creating a new planning schedule, PowerSchool SMS copies course requests from the active planning schedule.
   - **Scheduling Groups**: Copied from the Active Calendar's schedule. Where subjects are assigned in only the Planning Calendar, PowerSchool SMS sets the scheduling group default for homerooms to Homeroom Default, for classes, Classes.
   - **Term Sets**: Requires Scheduling Groups
   - **Day Patterns**: Copied from the Active Calendar's schedule where subjects are assigned in only the Planning Calendar, PowerSchool SMS creates 5 Regular Days and 0 Special Days.
   - **Bell Schedules**: Requires Day Pattern and Scheduling Groups. Copied from the Active Calendar's schedule only where subjects are assigned in both the Active and Planning Calendars.

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[1]You can do this if your role is School Administrator.

- **Meeting Patterns**: Requires Bell Schedules. Copied from the Active Calendar's schedule only where subjects are assigned in both the Active and Planning Calendars.
- **Course Scheduling Information**: Requires Meeting Patterns and Terms Sets
- **Class Loading Rules**
- **Team Loading Rules**
- **Teacher Allocations**: Requires Course Scheduling Information.
- **Class Schedules**: Requires Course Scheduling Information.
- **Student Schedules**: Requires Class Schedules.

6 Click **OK**.
- Note: If no scheduling elements are selected, PowerSchool SMS creates a blank planning schedule.

When a School Administrator develops a planning schedule by copying it from the Active Calendar [p. 172], PowerSchool SMS sets the schedule's fields as follows:

- **Class Setup**: Copied from the Active Calendar's schedule only where subjects are assigned in both the Active and Planning Calendars.
- **Can schedule**: Copied from the Active Calendar's schedule. Where subjects are assigned in only the Planning Calendar, PowerSchool SMS clears this flag.
- **Automatically assign this subject to all students in grade #**: PowerSchool SMS assigns students are assigned in the same way as the Active Calendar, that is, based on settings on the Edit Subject page and the creation of homerooms. Where subjects are assigned in only the Planning Calendar, PowerSchool SMS sets this to "Yes".
- **Default Teacher**: Copied from the Active Calendar's schedule. Where subjects are assigned in only the Planning Calendar, PowerSchool SMS sets this to the homeroom teacher
- **Number of Rosters**: Copied from the Active Calendar's schedule. Where subjects are assigned in only the Planning Calendar, PowerSchool SMS creates one roster per homeroom.
- Teacher preferences: Copied from the Active Calendar's schedule.

When a School Administrator creates a new planning schedule, PowerSchool SMS sets the schedule's fields as follows:

- **Staff List**: Same as the Active Calendar (a change in either calendar affects both).
- **Rooms**: Same as the Active Calendar (a change in either calendar affects both)

In a new planning schedule not copied from the Active Calendar, PowerSchool SMS sets the schedule's fields as follows:

- **Scheduling Group**: PowerSchool SMS creates two default scheduling groups: Homerooms and Classes.
- **Day patterns**: PowerSchool SMS creates 5 Regular Days and 0 Special Days.

- **Scheduling defaults**: For homerooms, the scheduling group default is Homeroom Default, for classes, Classes.
- **Can schedule**: PowerSchool SMS clears this flag.
- **Automatically assign this subject to all students in grade #**: PowerSchool SMS sets this to "Yes".
- **Default Teacher**: Homeroom teacher
- **Number of Rosters**: PowerSchool SMS creates one roster per homeroom.

Copying parts of a planning schedule

The administrator has the option of copying selected settings from each of the schedules in the Active Calendar [p. 172] into the Planning Calendar [p. 172] or from one Planning Calendar to another Planning Calendar. For example, the administrator could copy only Scheduling Groups, Bell Schedules, and Meeting Patterns. Selective copying enables the administrator to test various scheduling scenarios for the year being planned.

When the administrator copies a schedule's settings to a planning schedule, the following applies:

- Only the fields that are available in the Planning Calendar are copied from the Active Calendar.
- All the fields that are available in the Planning Calendar are copied from the Active Calendar, that is, the administrator cannot choose which scheduling elements or fields to copy to the Planning Calendar.
- PowerSchool SMS does not copy subjects from the Active Calendar to the Planning Calendar. It is the District Administrator who assigns subjects to schools and publishes the Subject Framework to district schools each calendar year.

Set up scheduling elements

[Applies to **elementary** [p. 282] and **secondary** [p. 285] school scheduling.]

Elements essential to a schedule include staff members [p. 216], rooms [p. 201], and subjects [p. 307] (elementary schools only) or courses (secondary schools only). Ensure that these are in place and up to date before developing a planning schedule [p. 303] (secondary only).

Set up a subject framework for an elementary school

[Applies to **elementary** schools]

A *subject* is a set of instructional topics and objectives taught to students, often for the entire school year. A *subject element* is one component of a complete subject. For example, Science is a subject that is taught to all Grade 4 students for the whole year. Music is a subject taught to all Grade 5 students, but some take the Choir subject element and some take Band.

A School Administrator can view the subject framework available to his or her school [*Figure 137*]. The administrator can use the framework to make a

subject available for scheduling in one or more grade levels and to set up how it can be scheduled.

Figure 137: Elementary school subject framework

A   *Subject*: Click the name to view the subject's details, including its Designation, which can be Core or Specialty.
B   *Subject element*
C   Grade levels: "Y" indicates that a subject is available to a grade level.
D   "Y": Indicates that a subject is available for scheduling in a grade level. Click the link to view its scheduling setup.

To work with a school's subject framework: [SA][1]

1   In the **Admin** menu, click **School Setup**.
  - Or click **Scheduling**.
2   Under **School**, click **Subject Framework**. The Subject Framework page appears [*Figure 137*].
  - To make a subject available for scheduling in a grade level, select the subject and from the **Actions** menu, select **Schedule / Un-schedule Generic Subject....** If a student has been manually added to or removed from a class for the subject, you cannot remove the subject from the grade.
  - To modify a subject's scheduling setup for a grade level, click "Y" in the appropriate column.
  - To remove a subject's availability for scheduling in a grade level, select the subject and from the **Actions** menu, select **Schedule / Un-schedule Generic Subject....** If an administrator has added or removed a student from one of subject's classes manually (that is, PowerSchool SMS did not do it automatically) then it is not possible for the administrator to remove the subject.

Set up multiple tracks

[Applies to **elementary** [p. 282] and **secondary** [p. 285] school scheduling.]

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[1]You can do this if your role is School Administrator.

With a schedule structure in place at a school [p. 307], the School Administrator can set up a schedule that features more than one track, that is, a schedule whereby the days that a student is in class are based on the student's track assignment. At a multi-track school, the administrator assigns a student to a homeroom meeting pattern set up as a track. The student only attends classes when "on track", that is, when his or her track is in session. Also, attendance for the student is taken only when he or she is on track.

To create a multi-track schedule, the administrator sets the school's Tracks option (on the School Setup page) and sets up relevant Relative-Days Patterns and meeting patterns. Consider the following detailed example in which the administrator sets up a four-track schedule at a school. All four tracks (A, B, C, and D) are within the same calendar year. On any given school day, three tracks are in session and one track is out of session. The administrator creates a Relative-Days Pattern for each day that three tracks are in session, creates a meeting pattern for each track, and assigns the meeting patterns to each homeroom.

To set up a four-track schedule at a school: [SA][1]

1 Set up Relative-Days Patterns [p. 360]:
   a Set up four Relative-Days Patterns as follows:

Days	Pattern name
ABC	ABC
BCD	BCD
ACD	ACD
ABD	ABD

2 Set up a bell schedule [p. 364] for each day in the Relative-Days Patterns:
   a For the **Scheduling Group**, select "Homerooms".
3 Set up meeting patterns for the tracks [p. 367]:
   a For **Meeting Pattern for Scheduling Group**, select "Homeroom".
   b Create the following meeting patterns:

Name	Short Name	Description (Relative Days)
Track A	A	ABC, ACD, ABD
Track B	B	ABC, BCD, ABD
Track C	C	ABC, BCD, ACD
Track D	D	ACD, ABD, BCD

4 Assign meeting patterns (tracks) to homerooms:
   a In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

---

[1]You can do this if your role is School Administrator.

b Click <u>Homerooms</u>. The Homerooms page appears.

c In the **HR** column, click a homeroom's name. The Edit Homeroom page appears.

d For **Meeting Pattern**, select an appropriate meeting pattern.

e Click **Save**.

5 Apply the appropriate Relative-Days Patterns to each school day [p. 363].

6 Turn on the tracks option for the school:

a In the **Admin** menu, click **School Setup**. The School Setup page appears.

b Under **Attendance General Settings**, select "Track homeroom attendance by meeting pattern".

c Click **OK**.

Configure student loading rules

[Applies to **secondary** [p. 285] school scheduling.]

Student loading rules enable the administrator to control how PowerSchool SMS's automatic scheduler schedules specific courses. For example, the administrator may want to ensure that elective courses are not all scheduled in the same term, or to ensure that two courses are scheduled in sequence.

PowerSchool SMS employs three types of student loading rules:

- Constraints [p. 310]: Control the distribution of students in classes.
- Class Loading Rules [p. 310]: Control the sequence of classes on a student's schedule, match the attributes of selected classes for a student, and balance the class load between terms on a student's schedule.
- Team Loading Rules [p. 313]: Enables the scheduling of a team of teachers.

Caution: We recommend that the administrator limit student loading rules to only those that are necessary because the more rules there are, the harder and longer PowerSchool SMS's Student Loader and Walk-in Scheduler has to work to create the student schedule; indeed if there are too many restrictive rules, PowerSchool SMS might not be able to find a suitable schedule. Also, the administrator might inadvertently create conflicting loading rules.

Note: The administrator can set the Student Loader to disregard alternate course requests [p. 347].

Setting up class loading rules

Class loading rules enable the administrator to control how the PowerSchool SMS Student Loader and Walk-in Scheduler load a student's schedule. Specifically, the rules influence the sequence of classes on a student's schedule, match the attributes of selected classes for a student, and balance the class load between terms on a student's schedule.

When loading a student's schedule, the Student Loader uses all class loading rules. For example, to ensure that a student's Chemistry Lab immediately follows Chemistry, the administrator sets up a course sequencing rule to

"always schedule Chemistry 11 to end in a period immediately before Chemistry Lab 11 begins". An identical rule is to "always schedule Chemistry Lab 11 to begin in a period immediately after Chemistry 11 ends".

The administrator can also set up course balancing rules so that a student's academic courses are not all scheduled in one semester while all that student's electives are scheduled in another. By default, based on semester (not full year) courses, the Student Loader and Walk-in Scheduler tries to schedule an equal number of courses in each semester. This schedule is based on all course requests and not within each course.

The administrator can set up "hard rules" and "soft rules". The Student Loader follows hard rules and attempts to comply with soft rules. Examples of hard rule parameters include: "Always Schedule" and "Never Schedule"; examples of soft rule parameters include: "Try to Schedule" and "Try Not to Schedule".

To set up a class loading rule: [SA][1]

1 In the **Admin** menu, click <u>Scheduling</u>. The Scheduling page appears.
2 Click <u>Class Loading Rules</u>. The Class Loading Rules page appears.
3 In the **Actions** menu, select **Add Rule**. The Add/Edit Class Loading Rule page appears.
   - Or, to edit an existing rule, under **Type**, click its name.
   - To delete a rule, select it and in the **Actions** menu, select **Delete Rule**.
4 Set options, which include:
   - **Rule type**: Sets the type of rule. Once the rule is saved, the administrator cannot change its type.
     - **Course sequencing rule** [p. 311]: Controls class sequences, such as when one class must or must not follow another; for example, to ensure that a science lab immediately follows a science class, or to ensure that a Spanish class does not immediately follow a French.
     - **Same/different attributes rule** [p. 312]: Controls the scheduling of classes that have the same (or different) teachers, terms, periods, rooms, class numbers, or meeting patterns across terms; for example, to schedule several classes across two terms with the same teacher, or to ensure that different classes meet in the same room.
     - To help you understand the rule as you define it, the description is immediately displayed below the rule parameters.
     - **Course load balancing rule** [p. 312]: Enables the administrator to ensure that classes of a particular group are spread evening across terms on student schedules; for example, to ensure that a student who several difficult academic courses does not have to take all those difficult courses in the same term.
5 For a **Course sequencing rule**, complete the three phrases as follows:
   a For **1**, select a scheduling option, which include:

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[1]You can do this if your role is School Administrator.

- Always schedule
- Never schedule
- Try to schedule
- Try not to schedule

  b Click **Select Course** and search for and select the first course(s) in the sequence then click **OK**. PowerSchool SMS displays the course name beside **1**.

  c For **2**, select an option, which include:
- To begin in a term
- To end in a term
- To begin in a period
- To end in a period

  d For **2**, select a second option, which include:
- Anytime before
- Anytime after
- Immediately before
- Immediately after

  e Click **Select Course** and search for and select the second course(s) in the sequence then click **OK**. PowerSchool SMS displays the course name beside 2.

  f For **3**, select a second option, which include:
- Begins
- Ends

6 For a **Same/different attributes rule**, complete the two phrases as follows:

  g For **1**, select a scheduling option, which include:
- Always schedule
- Never schedule
- Try to schedule
- Try not to schedule

  h Click **Select Course** and search for and select two or more courses then click **OK**. PowerSchool SMS displays the course names beside **1**.

  i For **2**, select an option, which include:
- With exactly the same
- With some of the same
- With all different
- With some different

  j For **2**, select another option, which include:
- Term
- Period
- Teacher
- Class number
- Meeting pattern across terms

7 For **Course load balancing rule**, complete the two phrases as follows:

  a For **1**, select a scheduling option, which include:
- Always schedule
- Never schedule
- Try to schedule

- Try not to schedule
  b   Click <u>Select Course</u> and search for and select two or more courses then click **OK**. PowerSchool SMS displays the course names beside **1**.
  c   For **2**, enter the scheduling load.
   - For example, "0.5". If the requested difference in scheduling load between terms is 0.5, and the student has requested 5 courses over 2 terms, PowerSchool SMS would schedule no more than 3 courses in a term (the perfect balance value is 1.25 -- that is, (5 x 0.5) / 2 -- and a tolerance of 0.5 means that a given term would be limited to a load of 1.75 -- that is, the perfect balance plus the tolerance).
   - **Note**: To achieve the best balance of courses between terms, we recommend that the administrator set the requested difference to the minimum load desired per term divided by the number of terms.
8   Click **OK**.
   - Click **Save & Add** to save this rule and set up another.

Setting up team loading rules

Team loading rules enable the administrator to have the PowerSchool SMS Student Loader and Walk-in Scheduler use a team of teachers to ensure that a group of students take the same classes with the same teachers.

Setting up a team involves naming it and identifying which staff members are on the team, and then assigning the team to one or more classes. Once the adnistrator has created two or more teams, she can specify which teams can or cannot overlap with which other teams.

With teams in place, the PowerSchool SMS Student Loader and Walk-in Scheduler can automatically allocate students to teams. The administrator can ensure that a student is assigned to a particular team, by assigning the student to a class [xref] for that team and locking the student in that class [xref]. Then, the PowerSchool SMS Student Loader will only assign the student to classes assigned to that team. **Note**: The administrator can assign a student to any class, even if that class has a team assigned to it.

To set up a team loading rule: [SA][1]

1   In the **Admin** menu, click <u>Scheduling</u>. The Scheduling page appears.
2   Click <u>Team Loading Rules</u>. The Team Loading Rules page appears.
3   In the **Actions** menu, select **Add Team**. The Add/Edit Team page appears.
   - Or, to edit an existing team, select it and in the **Actions** menu, select **Edit Teams**.
   - To delete a team, select it and in the **Actions** menu, select **Delete Team**.
4   Set options, which include:
   - **Team Name**: A name for the team. Appears on the Master Schedule page when a class is selected.

---

[1]You can do this if your role is School Administrator.

- **Code**: A short name that appears on other pages.
- **Allow overlap with teams**: Ensure that this list contains the teams the classes of which this team can overlap. By default, a new team can overlap with all existing teams.
- **Do not allow overlap with teams**: Ensure that this list contains the teams the classes of which this team cannot overlap.
- **Team Members**: Specifies the staff members whom PowerSchool SMS can assign to teach a class assigned to the team. Use the Search to locate staff to add to the team. Add all staff members who can be assigned to teach classes assigned to the team. When the Student Loader or Walk-In Scheduler creates a student's schedule, it will attempt to schedule the student into classes taught by a member of the student's team; for example, if a student is assigned to the Green team for Math, the Student Loader will attempt to schedule the student into a Math class taught by a teacher who is a team member of the Green team.

5   Click **OK**.

To assign a team to a class: [SA][1]

1   In the **Admin** menu, click **Master Schedule**. The Master Schedule page appears.
2   Under **Course Search**, search for the class. PowerSchool SMS displays a list of courses and the classes for each.
- Or, click **Display All Records**.
3   Under **Course Search Results**, select the class (es).
4   Under **Course Information**, for **Team**, select a team.
5   Click **Save**.

Example of a schedule using overlapping teaching teams

This example illustrates how an administrator could set up team teaching [*Table 60*, p.314] to control how students are scheduled into classes.

Table 60: **Team setup**

Team name	Do not allow overlap with teams	Comment
Cougars	Lions, Tigers, Panthers	The four basic teams, which do not overlap with each other
Lions	Cougars, Tigers, Panthers	
Tigers	Cougars, Lions, Panthers	
Panthers	Cougars, Lions, Tigers	
Yellow Cats	Tigers, Panthers	Combined teams
Jungle Cats	Cougars, Lions	

---

[1]You can do this if your role is School Administrator.

Table 61: **Core and elective classes, each belonging to a team**

Class (Team)	Class (Team)
English 9-1 (Cougars)	Math 9-1 (Cougars)
English 9-2 (Lions)	Math 9-2 (Lions)
English 9-3 (Tigers)	Math 9-3 (Tigers)
English 9-4 (Panthers)	Math 9-4 (Panthers)
Photography 9-1 (Yellow Cats, which can only overlap with Cougars and Lions)	Band 9-1 (Yellow Cats, which can only overlap with Cougars and Lions)
Photography 9-2 (Jungle Cats, which can only overlap with Tigers and Panthers)	Band 9-2 (Jungle Cats, which can only overlap with Tigers and Panthers)

When Bill and Sue walk into school with their course requests for the above courses [*Table 61*, p.315], the administrator can manually schedule Bill into a class in the Cougars team (such as English 9-1) and Sue into a class in the Lions team (such as English 9-2.) The Student Loader follows the above rules and creates the schedules for Bill and Sue [*Table 62*, p.315].

Table 62: **Sample schedules**

Bill in Cougars team	Sue in Lions team
English 9-1 (Cougars)	English 9-2 (Lions)
Math 9-1 (Cougars)	Math 9-2 (Lions)
Photography 9-1 (Yellow Cats)	Photography 9-1 (Yellow Cats)
Band 9-1 (Yellow Cats)	Band 9-1 (Yellow Cats)

As a result, Bill and Sue take separate classes for English and Math because the Cougars team and the Lions team cannot overlap. They would take the same Photography 9-1 and Band 9-1 class because these classes can overlap with both the Cougars team and the Lions team.

Set constraints

[Applies to **elementary** [p. 282] school scheduling.]

Constraints enable a School Administrator to control the PowerSchool SMS automatic scheduler's distribution of students in classes (and, in an elementary school, homerooms) by setting eligibility criteria. For example, using constraints an administrator can limit the class size of a science lab, set up an all-girl physical education class, limit the number of special needs students to 10% of a class roster, or ensure a homeroom has only student for whom English is a second language.

In a secondary school, the administrator can apply two types of constraints:

- *Restrictions*: Controls the distribution of students in classes according to specific criteria. For example, the administrator can ensure that at least 10 percent of the students in a class are girls or

restrict a class to students for whom English is their second language.

- *Capacity Balancing*: Ensures that the automatic scheduler distributes students evenly among available classes based on certain criteria. For example, the administrator can specify that students whose ethnicity is "African American" be distributed evenly among all available classes. Characteristics the administrator can balance across classes include:
  - Age (current)
  - Federal ethnicity category
  - Gender
  - Geocode (active)
  - Geocode (planning)
  - Grade level (current)

  Note: This type of constraint applies only where automatic scheduling is employed; it does not apply where the administrator assigns students one by one to a class.

Note: When creating student schedules, the Student Loader only considers constraints if the **Use Capacity Balancing Constraints** or **Use Restriction Constraints** option is selected on the Student Loader Options page.

A District or School Administrator can define a constraint [>>]. A School Administrator applies a constraint to a specific class or homeroom [p. 315]. Where a homeroom or class has constraints applied, PowerSchool SMS evaluates each student against the constraints' eligibility criteria at the time an administrator assigns a student to that homerooms or class. If the student does not meet the eligibility criteria, PowerSchool SMS displays an error message.

Note: The administrator can define a constraint for a custom field [p. 509]. For this constraint to apply, the setting for the Override Constraints permission must be No [p. 724].

Caution: To ensure accurate results when PowerSchool SMS calculates student eligibility, ensure student information is complete. When PowerSchool SMS processes an eligibility criterium that references a field that is empty, the student meets the criterium only if that criterium employs the "is empty" operator (that is, with any other operator PowerSchool SMS considers the return on that field as false). For example, if a student's Date of Birth field is empty, PowerSchool SMS would evaluate the following criterium as true: "age is empty". However, PowerSchool SMS would evaluate the following criterium as false: "age does not equal 12".

Applying a constraint

Once it is defined [p. 315], the School Administrator can apply a constraint to a specific class or homeroom. The administrator has several means of applying a constraint:

- To all classes created for a subject and/or to all homerooms
  In this case, the administrator can set the constraint(s) strength to be default, optional, or mandatory for the specified subjects or homerooms [see also *Set constraints* p.315].

- To a specific class
- To a specific homeroom
- Note: The administrator can also apply a constraint to courses when defining it [p. 315].

To apply a constraint to a subject or all homerooms: [SA][1]

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2 Under **Step 3**, click <u>Constraints</u>. The Constraints page appears [*Figure 138*].
3 In the **# of Classes** column, click the number. The Apply Constraint page appears.
   - Or, click the number in the **# of HR's** column.
   - Or, select the constraint and from the **Actions** menu select **Apply Constraint**.
4 Under **Selected Subjects/Homerooms**:
   - To apply the constraint to a subject, ensure that **Constraint is for subjects** is selected and move available subjects to the **Selected subjects** column.
   - To apply the constraint to all homerooms, ensure that **Constraint is for homerooms** is selected.
   - For **Constraint is _____ for selected subjects**, select one of the following (also known as the constraint's "strength"):
     - *Available*: The constraint is available for a School Administrator to apply to the selected classes or homerooms.
     - *Default*: PowerSchool SMS automatically applies the constraint to all new classes or homerooms created for the selected subjects and homerooms.
     - *Mandatory*: PowerSchool SMS automatically applies the constraint to all new classes or homerooms created for the selected subjects and homerooms. A School Administrator cannot remove this constraint.
5 Click **OK**.

Figure 138: Constraints page

	Name	Defined at	Description	# of Classes	# of HR's
☐	Girl's Science	District	Classes created for the subject: Science 2 may be given the restriction that they must contain all students where: (Gender = Female)	0	
☐	SPED restriction	District	Homerooms will have the default restriction (that may be removed) that they must contain at most 10% students where: (Receives Specialized Services = Yes)		0

List: All   Selected: 0   Total: 2

[1]You can do this if your role is School Administrator.

Figure 139: Apply Constraint page

A Constraint description [p. 315]: An example of **Type** is "Restriction". **Strength** can be "Available", "Default", or "Mandatory".

B **Selected classes**: This option is available if the constraint is available to subjects or a default [p. 315]. This option is not available if the constraint is mandatory for the subject.

C **Selected homerooms**: This option is available only if the constraint is available to homerooms [p. 315]. This option is not available if the constraint is mandatory for homerooms.

To apply a constraint to a specific class: [SA][1]

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2 Click **Class Setup**. The Class Setup page appears.
3 Find and view classes by searching by subject, teacher, or room. The Class Setup page appears.
   - Click **Display All Records** to view all classes available.
4 Under **Subject Search Results**, select one or more classes. A **Class Constraints** panel appears.
5 Under **Class Constraints**, move selected **Available constraints** to **Selected constraints**.
6 Click **Save**.

---

[1]You can do this if your role is School Administrator.

Defining a constraint

A School or District Administrator defines a constraint. A constraint defined by a District Administrator is available to all schools in the district. If a School Administrator modifies a district-level constraint for use at a school, PowerSchool SMS creates a school-level definition of the constraint (without modifying the district-level version).

To define a constraint: [SA][1]

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

2 Under **Step 3**, click <u>Constraints</u>. The Constraints page appears [*Figure 138*].

3 From the **Actions** menu, select **Add Constraint**. The Add Constraint page appears.
   - To adjust an existing constraint, in the **Name** column click its name, or select the constraint and from the **Actions** menu select **Edit Constraint**. When a School Administrator edits a district-defined constraint, PowerSchool SMS create a school-level copy of that constraint; the district-level constraint stays untouched and is available at the district and school levels).
   - To delete a constraint, select the constraint and from the Actions menu select **Delete Constraint**. A School Administrator cannot delete a district-level constraint.

4 The Add/Edit Constraint page has the following options:
   - **Name**: The constraint's name must be unique among those available to a school.
   - **Defined At**: Indicates the level at which the constraint was created: School or District.
   - **Program Constraint**: Indicates that the constraint applies to the specialized activities or courses outside of regular academic studies, that is, through Program Management. When selected, program-related criteria appear under Select Student Criteria [p. 320].
   - **Track Program Attendance for Classes with this Constraint**: Ensures that PowerSchool SMS includes these classes in instructional minute calculations.
   - **Constraint type**: Restriction or Capacity Balancing [see p.320].

5 Under **Complete the following phrase to define the constraint**, construct the constraint statement:
   - Select the constraint strength:
     - Select "Must contain" to have PowerSchool SMS automatically not schedule a student who does not satisfy the criteria.
     - Select "Should contain" to have PowerSchool SMS automatically attempt schedule a student who satisfies the criteria. However, if another class or homeroom is not available, PowerSchool SMS schedules any student who does not satisfy the criteria.
   - Set the constraint range and value:

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[1]You can do this if your role is School Administrator.

- "At most": The maximum number of students that can have the specified criteria.
  - "All": All students must satisfy the criteria for PowerSchool SMS to schedule them. This option is equivalent to "must contain 100%".
  - "No": No students need satisfy the criteria for PowerSchool SMS to schedule them. This option is equivalent to "must contain 0%".
  - Set the matching criteria to "Matching" or "Not matching".
6 Under **Select Student Criteria**, set the criteria that a student must satisfy to be eligible to be scheduled into the class or homeroom. Add one or more criteria to **Eligibility Criteria** as follows [*Figure 140*]:
   a For **Category**, select the type of data to be added; for example, Attendance, Demographics, Enrollment, Grading, Health.
   b For **Search By**, select a field or function [*Figure 141*]. Selections available depend on the Category selected.
   c Select an appropriate operator, for example, equals, is greater than, is less than.
   d Set appropriate values.
     - Text is case sensitive.
   e Click **Add Criteria**. PowerSchool SMS adds the criterium to the bottom of the list of criteria, below any selected criterium.
7 Work with the **Eligibility Criteria** until the set is valid and useful:
   a To delete a criterium, select it and click **Remove**.
   b To add a logical operator to define the relationships between criteria, select "Criteria" or an operator and click **AND** or **OR**.
   c To move a criterium, click and drag it.
   d To validate the Eligibility Criteria, click **Validate**.
     - If, under **Define Constraint**, **Program Constraint is** selected, specify the programs in which a student must be enrolled:
       - Select a **Program Category**.
       - Select a **Program**.
       - Move selected **Available sessions** to the **Selected sessions** list.
8 [Optional] If the **Constraint type** is **Capacity Balancing**, under **Select Student Criteria**, for **Balance By** select the characteristic you want to balance across classes.
9 Assign the constraint to one or more courses:
   a Search for particular courses or click **Display All Records**.
   b Move the course(s) to the **Selected Courses** list.
   c For **Constraint Is**, select an option:
     - *Available*: The constraint is available to classes for this course. It is not automatically assigned to classes. This is the default choice.
     - *Default*: The constraint is applied by default to newly created classes for this course, but the administrator can remove it for specific classes.
     - *Mandatory*: The constraint is required for all classes for this course and cannot be turned off for any class.

- The administrator can also assign a constraint to a class using the Master Schedule page [p. 342].

10 Click **OK**.

Figure 140: Constraint Eligibility Criteria building example

A   Criterium builder: Click **Add Criteria** to add the criterium to the Eligibility Criteria.
B   **Eligibility Criteria** tree presentation: Multiple criteria must conform to the "Rule of Two", that is, each operator must have a pair of items nested underneath. Item pairs can be either two criteria or one criteria and an operator (AND/OR).
C   Logical operator: Operators are necessary where there is more than one criterium. For example, if a student must meet all the criteria, the first node under Criteria must be AND; if a student must only meet one of the criteria, the first node should be OR.
D   Node: You can re-arrange nodes by clicking a node and dragging it to another location in the statement.
E   Eligibility criteria statement: A plain-language version of the saved/validated criteria.

Figure 141: Criterium function example

A **Search By**: When a function is selected, you can specify conditions under Where the following conditions apply. Select an operator and a value to complete the criterium.

B Function: A predefined tool used to construct statements about complex data that require you to specify limiting or "where" clauses. For example, if you specify that a student must have a cumulative GPA of 3.5, PowerSchool SMS will look at all cumulative GPA definitions. However, if you use a cumulative GPA function, PowerSchool SMS generates additional Search By sets to enable you to select a specific GPA definition.

C **Where the following conditions apply**: Appears when a function is selected. Any limiting terms necessary to extract the appropriate data are preset.

D Function parameter: The options available for some parameters depend on the level: district or school. At the district level, you can select from a list of values from any school in the district; at the school level, the selection is limited to that of the school. A criterium created at the district using a value that is defined at all schools but one, will exclude any students from that one school.

Caution: To ensure accurate results when PowerSchool SMS calculates student eligibility, ensure student information is complete. When PowerSchool SMS processes an eligibility criterium that references a field that is empty, the student meets the criterium only if that criterium employs the "is empty" operator (that is, with any other operator PowerSchool SMS considers the return on that field as false). For example, if a student's Date of Birth field is empty, PowerSchool SMS would evaluate the following criterium as true: "age is empty". However, PowerSchool SMS would evaluate the following criterium as false: "age does not equal 12".

Set subject scheduling rules for an elementary school

[Applies to **elementary** schools]

With the subject framework [>>] for a school set up, a School Administrator can schedule any subject available to the school in one or more grade levels. Scheduling a subject involves setting its general scheduling rules (including the ability to schedule classes).

To set a subject's scheduling rules: [SA][1]

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[1]You can do this if your role is School Administrator.

1 In the **Admin** menu, click **Scheduling**. The Scheduling page
   appears.
2 Click <u>Subject Scheduling</u>. The Subject Scheduling page
   appears [*Figure 142*].
3 In the **Subject Name** column, click the name of the subject.
   The Edit Subject page appears.
   - To view the subject's classes, in the **# Classes** column click the
     number. The Class Setup page appears.
4 Under **Schedule**, indicate how this subject is to be scheduled.
   Options include:
   - **Can schedule**: When selected, indicates that the School Administrator
     can create classes for this subject. Caution: If classes exist for this
     subject and an administrator deselects this option, PowerSchool SMS
     deletes those classes from the schedule.
   - **Student**: With **Automatically assign this subject to all students in
     grade #** selected, PowerSchool SMS automatically assigns all students
     in the relevant grade to one of this subject's classes when the
     administrator creates student schedules [p. 332]. The selected grade
     depends on The grade level is determined by the subject framework
     [>>]. With **School will assign this subject to individual students**
     selected, the administrator assigns students to this subject's classes.
   - **Default teacher**: With **Homeroom teacher** selected, PowerSchool
     SMS automatically assigns the homeroom teacher to all classes.
     Selecting **School plans to use team teaching** enables the
     administrator to assign more than one teacher to a class in this subject
     see *Setting up team loading rules* [p. 313]. With **Specify** selected, the
     administrator can select any teacher in the school other than the
     homeroom teacher.
   - **Number of rosters**: With **One roster per homeroom** selected,
     PowerSchool SMS creates one roster for each homeroom. With **Specify**
     selected, the administrator can specify the number of rosters. For
     example, for a computer lab subject in a school with limited number
     of computers, the administrator would likely need to create more
     rosters than there are homerooms. Where there are two or more
     rosters, PowerSchool SMS places all students in the first roster.
     Thereafter, the administrator can transfer students to other rosters as
     necessary. Also, the administrator can specify a teacher for the
     second roster.
5 Click **OK**.

Figure 142: Subject Scheduling page

	Subject Name	Grade	Designation	Auto-Assign	# Classes
☐	Creative Arts K	K	Specialty	Y	0
☐	Creative Arts 1	1	Specialty	Y	0
☐	Creative Arts 2	2	Specialty	Y	0
☐	Creative Arts 3	3	Specialty	Y	0
☐	Creative Arts 4	4	Specialty	Y	0
☐	Creative Arts 5	5	Specialty	Y	0
☐	Creative Arts 6	6	Specialty	Y	0
☐	Creative Arts 7	7	Specialty	Y	1
☐	Creative Arts 8	8	Specialty	Y	4
☐	English/Second Lang 1	1	Specialty	Y	0
☐	English/Second Lang 2	2	Specialty	Y	0

A **Subject Name**: Lists all subjects available to this school (determined by the subject framework [p. 356]). Click a subject name to schedule it.

B **Grade**: The grade for which this subject is offered.

C **Designation**: Indicates that the subject is "Core" or "Specialty". Core subjects are usually taught to all students in a grade.

D **Auto-Assign**: "Y" indicates that PowerSchool SMS automatically assigns the subject to all students in that grade level.

E **# Classes**: The number of classes for this subject. Click a number to set up classes.

For guidance on how to apply scheduling rules, refer to the following examples:

- *Language Arts example*: In a school where Language Arts is a core subject with a number of subject elements that are taught to all students in Grades 1 through 6, the School Administrator would set scheduling properties as follows:

  Can Schedule selected.

  Automatically assign this subject to all students in grade 5 selected.

  Default teacher > **Homeroom Teacher** selected.

  Number of rosters > **One roster per homeroom** selected. Since there are three Grade 5 homerooms, PowerSchool SMS creates three Language Arts 5 rosters.

- *Art example*: In a school where Art is a specialty subject taught to all students in Grades 5 and 6 by a specialty teacher in the Art Room, the School Administrator would set scheduling properties as follows:

  Can Schedule selected.

  School will assign this subject to individual students selected.

  Default teacher > **Specify** and a teacher other than the homeroom teacher selected.

Number of rosters > **Specify** and set 4 rosters. Since not all Grade 5 students are required to take Creative Art, the school needs fewer rosters than the number of homerooms. PowerSchool SMS assigns all students to the first roster, the administrator must transfer students from that roster to the others to fill them out: on the Subject Scheduling page in the # Classes column click the number.

- *Computer example*: Computers 5 is a specialty subject taught to all Grade 5 students. However, because there are only fifteen computers in the Computer Lab, you must create ten Computers 5 classes to accommodate 150 Grade 5 students.

  Can Schedule selected.

  School will assign this subject to individual students selected.

  Default teacher > **Specify** and a teacher other than the homeroom teacher selected.

  Number of rosters > **Specify** and set 10 rosters. Since the Computer Lab might have a limited number of workstations, the school needs more rosters than the number of homerooms. PowerSchool SMS assigns all students to the first roster, the administrator must transfer students from that roster to the others to fill them out: on the Subject Scheduling page in the # Classes column click the number.

Set up classes for an elementary school

[Applies to **elementary** schools]

The School Administrator at an elementary school can find and view classes by subject, by teacher, or by room. The administrator can adjust the setup of each class (for example, by changing the teacher(s) assigned to classes, the room, the name, or the meeting pattern) or assign the class to a particular teacher [p. 329] or room [p. 329].

To work with elementary school classes: [SA][1]

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2 Click **Class Setup**. The Class Setup page appears.
3 Click **Display All Records**.
   - Or, under **Subject Search**, search for classes using the available criteria (similar in technique to a Basic search for students [p. 38]).
   - Or search for selected classes by subject.
   - Or search for selected classes organized **By Teacher** [p. 329].
   - Or search for selected classes organized **By Room** [p. 329].
4 Under **Subject Search Results**, PowerSchool SMS displays a list of classes organized by subject. The information available includes the following (some of this information is only available if you adjust the columns displayed [p. 22]):
   - **Status**: Indicates any scheduling conflicts. To refresh, click **Save**.
     - Indicates a teacher conflict, that is, the teacher scheduled is also scheduled for another class in the same period.

---

[1]You can do this if your role is School Administrator.

- Indicates a room conflict, that is, the room scheduled for this class is also scheduled for another class at the same time.
- **Class Name**: The name of the class. The default class name that PowerSchool SMS creates includes the generic subject name, the grade level and the homeroom number (in round brackets) or the class number [in square brackets] [*Figure 143*]. The administrator can change this name, however keeping the name to less than 25 characters will ensure that it is fully visible on screen and in reports.
- **Term**: The term in which the class is offered (available where the schedule structure is set up and the class is assigned a meeting pattern). At a school that employs elementary scheduling, only full year term (FYT) is available.
- **Meeting Pattern**: The assigned meeting pattern (available where the schedule structure is set up). At a school that employs elementary scheduling, a meeting pattern is optional.
- **Teacher**: The teacher assigned to the class.
- **Room**: The room to which the class is assigned. If this room is the homeroom, PowerSchool SMS displays the homeroom number.
- **Flag**: "T" indicates that a teacher who is not the homeroom teacher is assigned to this class.
- **# Students**: The number of students assigned for the class. This number includes students who are scheduled to start the class in the future and excludes students who have withdrawn from the class.
- **Capacity**: The maximum number of students that the administrator can assigned to this class. Not relevant at a school that employs elementary scheduling.
- **Class #**: Not relevant at a school that employs elementary scheduling.
- **Class Code**: A highly abbreviated name for the class.
- **Course #**: The number of the subject associated with the class.
- **Course Alternate Name**: A secondary name for the course. Does not apply to schools using elementary scheduling.
- **Course Name**: The name of the subject associated with the class.
- **Course Short Name**: An abbreviated name for the course. Does not apply at a school that employs elementary scheduling.
- **Course State #**: Does not apply at a school that employs elementary scheduling.
- **Teacher 2**: Where more than one teacher is assigned to the class, the name of the additional teacher [see also *Team teaching option* p.330].
- **Teacher 3**: Where more than two teachers are assigned to the class, the name of the additional teacher [see also *Team teaching option* p.330].
- **Team**: "S" indicates that one or more of the students assigned to the class are from outside the homeroom [see also *Team teaching option* p.330]. Does not apply at a school that employs elementary scheduling.

5 Select a class. Under **Class Information**, PowerSchool SMS displays information for the selected class. The information includes:

- **Scheduling Group**: The scheduling group to which this class is assigned. Typically, the choices are "Classes" and "Homerooms". **Note**: Even if the school does not employ a scheduling structure [p. 356], a class must be assigned to a scheduling group.
- **Class comment**: Notes on the class for and by the administrator to a maximum of 270 characters.
- **Code**: An optional short code name for the class.
- **Use homeroom classroom**: Indicates that the class is taught in the homeroom's room. If selected, the administrator is unable to assign this class to a different room.
- **Collect Attendance**: [Refer to *Setting up supplementary class attendance* [>>]]
- **Default Attendance Code**: [Refer to *Setting the default attendance code* [>>]]
- **Class Constraints**: [Refer to *Configure student loading rules* [>>]]
- **Class Schedule**: [*Figure 144*] Enables the administrator to set the meeting pattern, teacher(s) and room. PowerSchool SMS displays conflicts generated by the selections. To schedule the class for an additional term or semester, click **Add More Detail**. **Caution**: Do not use Add More Detail to create blocked periods for classes [see p.367] because this would create several instances of the class, which can be confusing when searching for classes.

Figure 143: Class Setup page
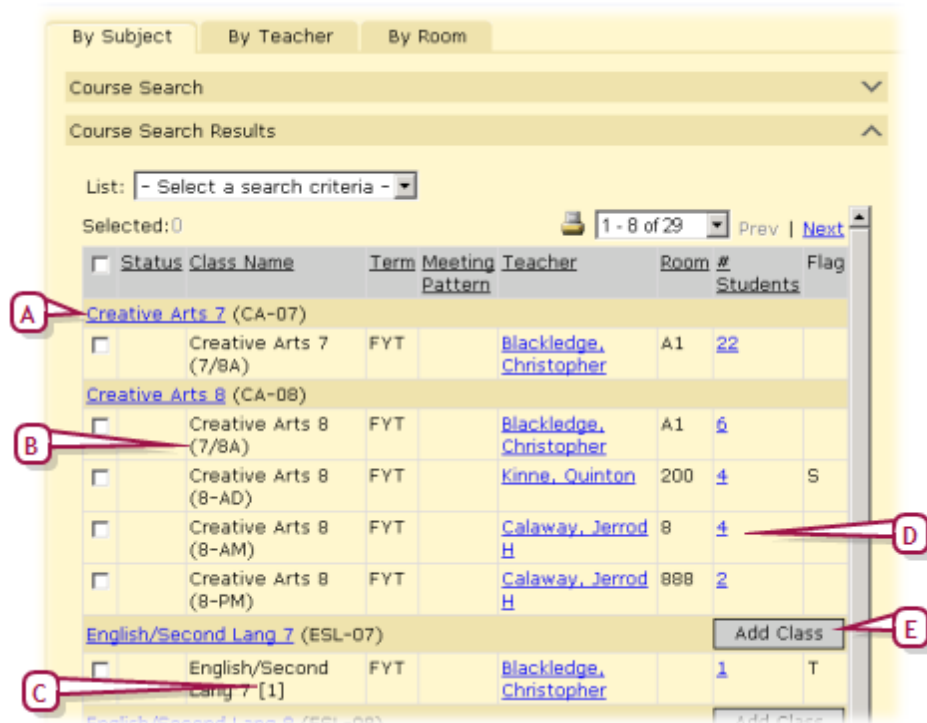
A Subject: Click to edit the subject's scheduling rules [p. 322].
B Class with homeroom number (in round brackets). The homeroom number appears if the subject's scheduling rule **Number of Rosters** is set to **One roster per homeroom** [p. 322]. In which case, PowerSchool SMS sets up one class for

each homeroom; the administrator cannot add or delete classes.

    C   Class with class number [in square brackets]. The class number appears if the subject's scheduling rule **Number of Rosters** is set to **Specify** [p. 322].

    D   **# Students**: Click the number to view the class roster.

    E   **Add Class**: Enables the administrator to add a class for this subject. Appears only if the subject's scheduling rule **Number of Rosters** is set to **Specify** [p. 322].

Figure 144: Class Setup page, Class Schedule

    A   Selected teacher: Enables you to adjust the teacher's settings, or delete the teacher's assignment to this class [p. 329].

    B   **Teacher Order**: Enables you to rearrange the order in which the teachers are listed. The teachers appear in this order in reports [p. 114] and for Year-End Processing [p. 450].

    C   **Teacher Class Role**: Specifies the teacher's role, such as "Teacher of Record", Support Teacher", and "Teacher Assistant". Only one teacher can be a Teacher of Record for any given date across the class schedule.

    D   **Start Date**: The date the teacher was added to the class. Must be within the scheduled term. Format is mm/dd/yyyy.

    E   **End Date**: The date on which the teacher stopped performing his class role in the class. Must be within the scheduled term.

Creating classes for a subject

PowerSchool SMS automatically sets up a new class for each subject for which the scheduling rule **Can Schedule** is selected [p. 322] and for which **Number of Rosters** is set to **Specify** [p. 322]. This new class PowerSchool SMS uses for automatic scheduling; the administrator cannot delete it. When a class is created, PowerSchool SMS automatically assigns it to the default scheduling group [p. 357].

For a subject for which the scheduling rule **Can Schedule** is selected [p. 322], the administrator can rename or delete classes, and add classes up to

the specified maximum [p. 322]. When a class is created, PowerSchool SMS automatically assigns it to the default scheduling group [p. 357].

To create a class for a subject:

1   On the Class Setup page, under **Subject Search Results**, locate the subject in the grid.
2   For that subject, click **Add Class** [*Figure 143*].

For a subject for which the scheduling rule **Can Schedule** is selected [p. 322], the administrator can delete classes. For a subject for which the scheduling rule **Can Schedule** is not selected [p. 322], PowerSchool SMS does not display the subject's classes on the Class Setup page. The administrator cannot delete individual classes for a room. Deleting a homeroom removes all classes assigned to that homeroom.

To delete a class from a subject:

1   On the Class Setup page, under **Subject Search Results**, locate the subject in the grid.
2   Select the class to delete.
3   From the **Actions** menu, select **Delete Classes**.

Assigning a class to a teacher

The School Administrator can find and view classes organized by teacher. This facilitates the review of teacher assignments and the assigning of a class to one or more teachers.

To assign a class to a teacher [SA] [1]:

1   In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2   Click **Class Setup**. The Class Setup page appears.
3   Click **By Teacher**.
4   Under **Teacher Search**, click **Display All Records**.
   •   Or search for teachers using the available criteria (similar in technique to a Basic search for students [p. 37]).
   •   Or search for selected classes by subject.
5   Under **Teacher Search Results**, PowerSchool SMS displays a list of classes organized by teacher [*Figure 145*].
   •   You can change the columns displayed on this page [p. 48].
6   Under **Class Search**, locate the class(es). PowerSchool SMS displays these under **Class Search Results**.
7   Under **Class Search Results**, select one or more classes to assign.
8   Under **Teacher Search Results**, beside the teacher's name, click **Add**. PowerSchool SMS assigns the class to the teacher.
   •   You can assign a selected class to up to three teachers.
9   Click **Save**.

---

[1]You can do this if your role is School Administrator.

Figure 145: Class Setup: By Teacher

A   Teacher name
B   **Status**: Indicated the teacher's scheduling conflicts
C   Teacher number
D   Selected class
E   **Add**: Assigns the selected class(es) to the teacher.

To remove a teacher's class assignment [SA][1]:

1   On the Class Setup page, under **By Teacher**, under **Teacher Search Results**, select one or more classes [*Figure 145*].
2   From the **Actions** menu, select **Remove from Schedule**.

Or

1   On the Class Setup page, under **Class Schedule** [*Figure 144*] select the teacher.
2   From the **Actions** menu, select **Delete Teacher Assignments**.

Team teaching option

By setting a subject's scheduling rules, the School Administrator can assign more than one teacher to a class (typically co-teachers or a teacher and teaching assistant) or change the Homeroom teacher automatically assigned by PowerSchool SMS to another teacher. Specifically, the subject's **Default Teacher** must be set to **Homeroom Teacher** and **School Plans to Use Team Teaching** selected [p. 322].

For example, in a school where Grade 3 students are required to take the core subject Language Arts, Mr. Smith (rather than the homeroom teacher) teaches all the Language Arts 3 classes. The School Administrator schedule this by doing the following:

1   For Language Arts 3, set the following scheduling rules on the Edit Subject page [p. 322]:
    •   **Student**: Select **Automatically assign this subject to all students in grade 3**.

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[1]You can do this if your role is School Administrator.

- **Default teacher**: Select **Homeroom teacher** and **School plans to use team teaching**.
- **Number of rosters**: Select **One roster per homeroom**.

2 Locate all Language Arts 3 classes by searching with the criteria "Uses Team Teaching" equals "Yes" [p. 328].

3 For each Language Arts 3 class, set the **Teacher** to "Mr. Smith" [p. 328].
- You can also add a teacher by setting **Other teacher**.
- PowerSchool SMS sets **Teacher** automatically to the homeroom teacher.
- On the Classes page, under **Flag**, a "T" indicates that the class is being taught by a teacher other than the homeroom teacher.

Other examples of how the **School plans to use team teaching** option might be used include the following:

- The Homeroom 6-A teacher excels at teaching Math while the Homeroom 6-B teacher excels at teaching Social Studies. To make the most of these skills, the School Administrator would for Math 6 and Social Studies 6 select **School plans to use team teaching** then assign the Homeroom 6-A teacher to both Math classes and the Homeroom 6-B teacher to both Social Studies classes.

- Co-teaching a homeroom: Homeroom 4-A is a homeroom for which Mr. Jones, a math specialist, and Mrs. Garcia, a Social Studies specialist, share responsibility. To accommodate this, the School Administrator would for Math 4 and Social Studies 4 select **School plans to use team teaching** then assign Mr. Jones to Homeroom 4-A's Math class and Mrs. Garcia to its Social Studies 4 class.

- Assigning certain students to certain teachers: At a school where Grade 5 has three levels of Math, weaker, regular, and stronger, and three Grade 5 homerooms, 5-A, 5-B, and 5-C, the 5-A teacher teaches the weaker group, the 5-B teacher teaches the regular group, and the 5-C teacher teaches the stronger group. The administrator can transfer each Grade 5 student from the default class roster to the class roster that best suits their mathematics ability. For Math 5, set the following scheduling rules on the Edit Subject page [p. 322]: **Student**: Select **Automatically assign this subject to all students in grade 5**; **Default teacher**: Select **Homeroom teacher** and **School plans to use team teaching**; **Number of rosters**: Select **One roster per homeroom**. Locate and select Math 5 classes: 5-A, 5-B, and 5-C [p. 328]. Transfer students between the selected classes as necessary [p. 332]. (On the Classes list, under **Flag**, an "S" indicates that the class has students from outside the homeroom.)

Assigning a class to a room

The School Administrator can find and view classes organized by room. The facilitates assessing the distribution of classes and of assigning a class to a room. The administrator can assign each class to only one room.

To assign a class to a room: [SA][1]

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2 Click **Class Setup**. The Class Setup page appears.
3 Click **By Room**.
4 Under **Room Search**, click **Display All Records**.
   - Or search for rooms using the available criteria (similar in technique to a Basic search for students [p. 40]).
5 Under **Room Search Results**, PowerSchool SMS displays a list of classes organized by room.
   - PowerSchool SMS displays the room number followed by the ### in brackets.
   - PowerSchool SMS displays a class taught in a homeroom under that homeroom's room number.
   - You can change the columns displayed on this page [p. 48].
6 Under **Class Search**, locate the class(es). PowerSchool SMS displays these under **Class Search Results**.
7 Under **Class Search Results**, select one or more classes to assign.
8 Under **Room Search Results**, beside the room number name, click **Add**. PowerSchool SMS assigns the class to the room.
9 Click **Save**.

To remove a class's room assignment: [SA][2]

1 On the Class Setup page, under **By Room**, under **Room Search Results**, select one or more classes.
2 From the **Actions** menu, select **Remove from Schedule**.

Student schedule creation for an elementary school

[Applies to **elementary** school scheduling.]

Once appropriate preparations are complete, the School Administrator can initiate a process whereby PowerSchool SMS creates a student schedule for each student in all subjects that are set to be auto-scheduled [p. 322]. Typically, the administrator initiates this process in the Planning Calendar [p. 172] or in the Active Calendar [p. 172] early in the school year before grades or attendance have been recorded. Caution: If grades or attendance has been recorded for a student, PowerSchool SMS cannot create that student's schedule.

PowerSchool SMS bases its schedule for a student on his or her planned grade level and homeroom. All students at an elementary school must be assigned to a homeroom [p. 202]. PowerSchool SMS uses a student's homeroom assignment to assign that student to core subject classes for which it sets up class rosters. The School Administrator can adjust these rosters by transferring students between classes [p. 333].

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[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.

Note: Appropriate preparations for the student schedule creation process [p. 282] include the administrator having assigned all students to homerooms. To quickly determine which students have yet to be assigned to a homeroom, search for students [p. 37], and sort the search results by homeroom (**HR**). Students with no homeroom assigned ("N/A") appear together.

To create student schedules: [SA][1]

1   In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2   Click <u>Create Student Schedules</u>. The Create Student Schedules web page dialog appears.
3   For **Create schedules and class assignments for** select one of the following:
    - **All students**: Assigns students to classes in all subjects that are set up to automatically assign the subject to all students in a grade [p. 325]. If a student has auto-created class assignments for some of these subjects already, PowerSchool SMS clears those classes from the student's schedule and re-assigns them as of the first day of school. PowerSchool SMS does not alter any class to which the student was assigned manually.
    - **Students with no auto-scheduled classes**: Assigns students to classes in subjects that are set up to automatically assign the subject to all students in a grade where an auto-created class for that subject does not already exist. If a student has auto-created class assignments for some of these subjects already, PowerSchool SMS does not clear those classes from the student's schedule. PowerSchool SMS does not alter any class to which the student was assigned manually.
4   Click **OK**.

Changing a student's class assignments

[Applies to **elementary** [p. 282] and **secondary** [p. 285] school scheduling.]

Once student schedules are created in PowerSchool SMS, the School Administrator can change a student's class assignments and assign the student to other classes, such as for specialty subjects that PowerSchool SMS might not have automatically assigned.

Typically, the School Administrator makes these changes in the Planning Calendar, [p. 172] that is, before the school term starts. However, once school has started, school staff can make the changes in the Active Calendar.

To change a student's class assignments: [SA][2]

1   Open the student(s) schedule:
    a   Click <u>Student Search</u> and use the Basic search [p. 40] to find the student(s).

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[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.

    b Under **Search Results**, select the student(s).

    c From the **Actions** menu, select **Open Student** > **Schedule**.
The Student Schedule page appears [*Figure 146*].

- Or on a student's Student Demographics page [p. 56], in the control bar, click **Schedule**.

2 If working in the Active Calendar, set **Changes Effective** to indicate the time at which this change is to take effect.
Options are:

- **Today:** The default selection.
- **Tomorrow**
- **First day of school**
- **Specify**: A specific calendar date.

3 Transfer a student between classes, as necessary [see also *Adjusting class assignments during the year* p.336] [see also *Transferring an elementary student from one homeroom to another* p.337]:

    a In the schedule, select the class from which you want to transfer the student.

    b Under **Class Search**, find the class to which you want to transfer the student.

    c Click **Transfer Class**.

- Working in the Active Calendar, **Change Reason** appears if the District Administrator has set up reasons. Selecting a reason may or may not be required.

4 Drop a class, if necessary:

    a In the schedule, select the class to drop.

    b Click **Drop Class**.

5 Add a class, if necessary:

    a Under **Class Search**, find the class to add.

    b Click **Add Class**.

6 Click **Save**.

Figure 146: Student Schedule page

A   **Prev** | **Next**: When the administrator opens more than one student's schedule, this enables him or her to switch to another student's schedule.

B   **Re-assign/Assign Default Classes**: Where a student enrolls in a school after schedules are created, click this to assign default classes to that student. Where you want to return the student's schedule to the default, click this. The button name changes according to the state of the schedule and the *Subject Scheduling permission* [p. 730]. **Note**: Where a student has transferred homerooms during the school year, when this is clicked, PowerSchool SMS generates a schedule based on the student's homeroom or grade the first day of school to the transfer date, then another schedule for the new homeroom or grade from the transfer day to the last day of school. PowerSchool SMS does not consider the Effective Date. PowerSchool SMS does not change any class that was added by the administrator.

C   Columns: You can adjust the columns displayed [p. 48].

D   **Term**: The term in which the class occurs, for example, "S1" for semester 1 or "FYT" for Full-Year Term. An asterisk (*) indicates that the student left the class before the end of the term. [see Student Manage section for duplicate information]

E   **Class Name**: Click the name to view a class roster.

F   Subject exception for this class see *Subject exceptions* [p. 370]

G   **Change Reason**: Working in the Active Calendar, this appears if the District Administrator has set up reasons. Selecting a reason may or may not be required (indicated by an *).

H   **Changes Effective**: Relevant when working in the Active Calendar [p. 172].

I   **Details**: Click to view detailed information about the class.

Note: In the Active Calendar [p. 172], if the administrator transfers a student to another class with **Changes Effective** set to **First Day of School**, the class change is deleted and PowerSchool SMS reassigns the student to the auto-generated class (except if both classes belong to the same subject; in which case the administrator must explicitly reassign the student). The administrator can ensure that PowerSchool SMS does not delete such a class change by setting **Changes Effective** to the date of the second day of school. This might, however, affect grading and attendance calculations for the school. In the Planning Calendar, if the administrator sets **Changes Effective** to **First Day of School**, PowerSchool SMS recreates manually dropped classes in the student's schedules.

Adjusting class assignments during the year

During the school year (that is, in the Active Calendar [p. 172]), the School Administrator and other staff at a school can assign one or more students to a class, transfer students from one class to another, or just drop students from a class. Examples of a need to adjust class assignments include:

- A walk-in student needs to be assigned to a class.
- A group of students taking Music for the first half of the year switch to Art for the second half.
- A student no longer needs a resources service part way through the year.

Staff can use the student's schedule [p. 335] or a class roster to affect a class assignment change.

To assign one or more students to a class roster:[SS, SA][1]

1 On the Class Roster page [p. 17], in the **Actions** menu, select **Add Students...**. The Select Students dialog appears.
2 Use **Last name** and **First name** to search for one or more students.
3 Click **Search**. PowerSchool SMS displays students under **Search results**.
4 Select the student(s) and click **Add**. The Class Change Options dialog appears.
5 Set options, which include:
    - "Today": The default selection
    - "Student's first day in school this year"
    - "Specify": A specific calendar date
    - **Change Reason**: Appears if the district provides pre-set reasons. A selection may be required.
6 Click **OK**.

To transfer one or more students from a class: [SS, SA][2]

1 On a Class Roster page [p. 17], select one or more students.
2 In the **Actions** menu, select **Transfer Students...**. The Transfer to Class page appears.

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[1]You can do this if your role School Secretary or School Administrator.
[2]You can do this if your role is School Secretary or School Administrator.

3 For **Class**, select another class.

4 Click **OK**. The Class Change Options dialog appears.

5 Set class change options, which include:
- **Today**: The default selection.
- **Student's first day in school this year**
- **Specify**: A specific calendar date.
- **Change Reason**: Appears if the district provides pre-set reasons. A selection may be required.

6 Click **OK**.

To drop one or more students from a class:[SS, SA][1]

1 On a Class Roster page [p. 17], select one or more students.

2 In the **Actions** menu, select **Drop Students...**. The Transfer to Class page appears.

3 For **Class**, select "None".

4 Click **OK**.

To assign one or more students to more than one class: [SS, SA][2]

1 On a Class Roster page [p. 17] or a homeroom's Roster page, select one or more students.

2 In the **Actions** menu, select **Assign > Classes**. The Assign Classes page appears.

3 Under **Class Search**, locate classes.

4 Under **Class Search Results**, select the classes to which to assign the students.

5 Select the **Change Reason**.
- Working in the Active Calendar, **Change Reason** appears if the District Administrator has set up reasons. Selecting a reason may or may not be required.

6 Set the **Changes Effective**.
- Relevant when working in the Active Calendar.

7 Click **Add Class**. PowerSchool SMS displays the classes under **Add Classes**.
- To drop the selected students from the selected classes, click **Drop Class**. PowerSchool SMS displays the classes under **Drop Classes**.
- To transfer the selected students between one class under **Add Classes** and one under **Drop Classes**, select **Transfer**.

8 Click **Apply**.

Transferring an elementary student from one homeroom to another

During the year (that is, in the Active Calendar [p. 172]), the School Administrator and other staff at a school can transfer a student from one homeroom to another. (In elementary scheduling [p. 282], every student must be assigned to a homeroom [p. 59].) While a staff member can change

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[1]You can do this if your role is School Secretary or School Administrator.
[2]You can do this if your role is School Secretary or School Administrator.

a student's homeroom on that student's record [see p.55], transferring the student from a homeroom roster provides detailed information, including gender and ethnic category.

Note: The administrator can transfer a student to a homeroom in another school. The grade levels offered or not offered at that school have no effect on the transfer.

To transfer one or more students to another homeroom: [T, SS, SA][1]

1 On a homeroom's Roster page [p. 17], select one or more students.
- Or on a student's Student Schedule page [*Changing a student's class assignments* p.333]

2 In the **Actions** menu, select **Transfer Homeroom...**. The Transfer Homeroom page appears [*Figure 147*].

3 Select a homeroom.

4 Click **OK**. The Class Change Options dialog appears.

5 Set class change options, which include:
- **Today**: The default selection.
- **Student's first day in school this year**
- **Specify**: A specific calendar date.
- **Change Reason**: Appears if the District Administrator has set up reasons. A selection may be required.

6 Click **OK**. PowerSchool SMS changes the student's homeroom and changes all classes taught in that homeroom class to the classes taught in the new homeroom (except for classes scheduled manually, that is directly by the administrator).

Figure 147: Transfer Homeroom page

A **Total**: Indicates the total number of students assigned to the homeroom. An exclamation mark (!) indicates that the homeroom is at capacity.
B **Ethnic Categories**: Subtotals that indicates the number of students in each category.

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[1]You can do this if your role is Teacher, School Secretary, or School Administrator.

To assign one or more students to a homeroom:

1 On a Student Search results page [p. 48], select one or more students.
2 In the **Actions** menu, select **Assign > Values**. The Assign Values dialog appears.
3 For **Assign Field**, select "Homeroom".
4 For **Value**, select the homeroom.
5 Click **Add to List.**
6 Click **OK**.

Viewing student schedule changes

A student's schedule displays the student's schedule as of the end of the school year. The School Administrator can view each change made to a student's schedule during the year and its effective date. To be displayed, the change must take place over time; for example, a class added and dropped on the same day is not recorded as a change.

Note: A students Schedule Change History is only available in the Active Calendar [p. 172]. **Note**: For any change to the student's Grade or Homeroom Change History, PowerSchool SMS records under Last Updated By the name of the user who recorded the change (if PowerSchool SMS made the change, the field is left blank).

To view a history of a student's schedule changes: [SA][1]

1 In the Active Calendar, open the student(s) schedule:
   a Click **Student Search** and use the Basic search [p. 40] to find the student(s).
   b Under **Search Results**, select the student(s).
   c From the **Actions** menu, select **Open Student** > **Schedule**. The Student Schedule page appears [*Figure 146*].
   • Or on a student's Student Demographics page [p. 56], in the control bar, click **Schedule**.
2 From the **Actions** menu, select **View Change History**. The Schedule Change History page appears [*Figure 148*].

---

[1]You can do this if your role is School Administrator.

Figure 148: Schedule Change History page

A **Class Change History**: On this page, PowerSchool SMS displays change histories appear in three sections: **Grade and Homeroom Change History**, **Class Change History**, and **Subject Exception History**.

B **Edit...**: Click to edit the selected change. The Edit Class Change popup page appears.

C **Effective**: Indicates the class's current Effective Date. Click to view or adjust the change.

D **Change Reason**: The reason for a change. Click the reason to view and adjust the class change.

E **Details**: Click the icon to view and adjust the class's details.

F **Can Undo**: "Y" indicates that you can reverse this change. To reverse it, select the change and click **Undo Selection**. Only the most recent set of changes are reversible.

G **Last Updated By**: Shows which user made the change.

Assign default terms and meeting patterns to classes

[Applies to **secondary** [p. 285] school scheduling.]

The administrator can assign to each class a default scheduling group and term set, with attendant meeting patterns. When automatically creating classes for a course, PowerSchool SMS assigns them to this default scheduling group and distributes them between the terms of the term set. A class with an default scheduling group/term set becomes available for scheduling teachers and students.

The administrator can also set up a term override for a course. This involves specifying other scheduling group/term set combinations that are available

to the course on student request. For example, if you want to allow students to request one semester of a full year course, you can assign the full year term as the default offering and semesters as another allowed offering. When you record student course requests [p. 347], you can specify the full year term for students who want to take the full course, or a single semester for students you want to take part of the course, for example, if they need to switch periods. Caution: Only assign classes to the default offering. Assigning classes to multiple offerings may create grading errors.

To assign terms and meeting patterns to a class: [SA][1]

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2 Click **Course Offerings & Meeting Patterns**. The Course List page appears.
3 Under **Number**, click the number of the course. The Course Offerings page appears [*Figure 149*].
   - If the Course Offerings page does not appear, in the control bar click **Course Offerings**.
   - The contents of the Course Offerings page depends on the planning schedule in use [p. 303].
4 Under **Default Offering**, select a Scheduling Group/Term Set combination.
   - To view a scheduling group's selected meeting patterns, click in that group's row.
5 (With the default offering row selected) Under **Meeting Patterns**, make meeting patterns available by moving them to the Selected patterns list.
6 [Optional] Under **Allowed Offering**, select other Scheduling Group/Term Set combinations to be available for students on request.
7 Click **Save**.

---

[1]You can do this if your role is School Administrator.

A   Meeting patterns: To view a scheduling group's selected
     meeting patterns, click in that group's row.
B   **Selected patterns:** The course can only be scheduled into
     the meeting pattern(s) that are included in this list.
C   **Copy:** In the Planning Calendar, click to create a new course
     starting from an instance of the current course.

Build the school's master schedule

[Applies **secondary** [p. 285] school scheduling]

In the Planning Calendar [p. 172], a School Administrator builds a *master
schedule* for the school for the coming year. The master schedule is made up
of all classes created for the school, with all of their associated terms,
meeting patterns, teachers, and rooms. With a master schedule in place, the
administrator can schedule teachers, analyze student course requests, and
assign teachers and rooms to classes.

To build a master schedule, a planning schedule [p. 303] with a scheduling
structure and course offerings must be in place. Since each planning
schedule has its own master schedule, a School Administrator can
experiment with several scheduling scenarios. Such experimentation might
involve several iterations of the master schedule, in each of which the
administrator analyzes and adjust student requests, class scheduling
parameters, and teacher allocations. When the School Administrator is
satisfied with master schedule, he loads students into it.

A School Administrator can have PowerSchool SMS build a master schedule for one or more classes automatically. In preparation, the administrator sets various scheduling options [p. 346].

To have PowerSchool SMS automatically schedule one or more classes: [SA][1]

1   In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2   Click **Master Schedule**. The Master Schedule page appears [*Figure 150*] [*Figure 151*] [*Figure 152*].
3   Locate the course, teacher, or room for which to schedule classes:
    • Click **By Course**, **By Teacher**, or **By Room**. PowerSchool SMS displays a list under **Search Results**.
4   Locate the class(es) to schedule by searching under **Class Search**.
5   Under **Class Search Results**, select the class(es) to schedule.
    • When a class is selected, PowerSchool SMS displays information on that class under **Class Information**, including capacity, scheduling group, teaching team, scheduling constraints [p. 310], terms, meeting pattern, teachers, and room.
6   In the **Actions** menu, click **Schedule Classes...**.
    • Or, under **Search Results**, click **Add** for the specific course, teacher, or room.
    • To remove a class from the schedule, under **Search Results**, select it and click **Remove from Schedule**.
7   Click **OK**. PowerSchool SMS assigns a meeting pattern, teacher, and room to the selected class(es) based on class scheduling options [p. 346].

A School Administrator can build part or all of the Master Schedule manually, that is, add and remove classes deliberately one at a time without employing PowerSchool SMS's automatic processes. Also, when the schedule is active, the administrator can modify class schedules as necessary during the school year.

To adjust the master schedule manually: [SA][2]

1   In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2   Click **Master Schedule**. The Master Schedule page appears [*Figure 150*] [*Figure 151*] [*Figure 152*].
3   Locate the course, teacher, or room for which to schedule the class:
    • Click **By Course**, **By Teacher**, or **By Room**. PowerSchool SMS displays a list under **Search Results**.
4   Locate the class to schedule by searching under **Class Search**.
5   Under **Class Search Results**, select the class(es) to schedule.

---

[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.

6 Under **Search Results**, click **Add** for the specific course, teacher, or room.
- To remove a class from the schedule, under **Search Results**, select it and click **Remove from Schedule**.

7 Click **OK**. PowerSchool SMS schedules the class.

Figure 150: Master Schedule page: By Course
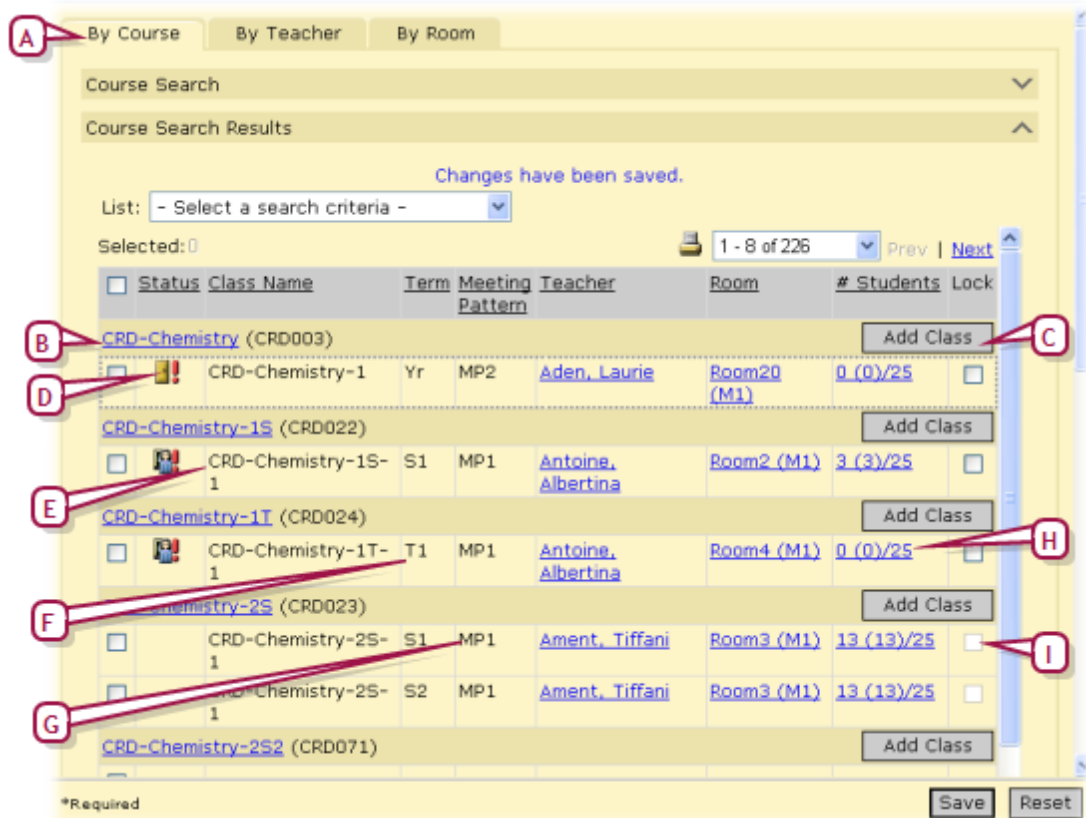
A Sorting criteria: View the schedule by course, teacher [*Figure 151*], or room [*Figure 152*].

More...

B Course name: Click to view the course's scheduling.

C **Add Class**: Adds a class to the course.

D **Status**: Indicates any conflicts. This column is blank until you run Master Schedule Builder or until you save any manual changes to the schedule. It is also blank if the class has no conflicts. Possible states include:
The class is full, that is, it has reached its capacity. If you use overfill then this is capacity + overfill percentage.
The class is overfull, that is, it has exceeded its capacity. If you use overfill then this is capacity + overfill percentage.
A teacher conflict, that is, this class is scheduled but the teacher is scheduled for another class in the same period.
A room conflict, that is, this class is scheduled but the room is assigned to another class at the same time.
This class is part of a combined set of classes.

E **Class Name**: The class name and section. Click the name to view class information.

F   **Term**: The term the class is offered. The list of terms displayed for a class is controlled by the Course Offerings & Meeting Patterns settings for the course.

G   **Mtg Pat**: The meeting pattern for the class. The list of meeting patterns displayed for a class is controlled by the Course Offerings & Meeting Patterns settings for the course. Part of this definition includes different meeting patterns for different scheduling groups, so if you change the scheduling group for the class, the list of meeting patterns changes as well.

H   **# Students**: The number of students assigned to the class. Click to view the class roster. The format is as follows: <current #> (<high water #>)/<class capacity>, where:
<current #> is the number of students in the class as of the current date or the date set in the Changes Effective field (Active Calendar [p. 172]) or the number of students on the first day of classes (Planning Calendar [p. 172]).
<high water #> is the highest number of students that the class has from this point in the school year forward.
<class capacity> is the capacity of the class from the class schedule data.
For example: 27 (31)/30 indicates that there are currently (or on the effective date) 27 students in the class and at one time during the year (after the effective date), the class will be (or was) at 31 students.

I   **Lock**: Indicates that automated processes, such as Master Schedule Builder and Student Loader, cannot change the information in the row. The administrator can make changes manually. To lock all classes in the schedule, in the Actions menu click **Lock All Classes**; to reverse this click **Unlock All Classes**.

Figure 151: Master Schedule page: By Teacher

A   Teacher: Click the teacher's name to view the teacher scheduling page. The name is followed by the teacher's FTEs. The first number in the FTE is the sum of the teacher's scheduled classes divided by the district full-time teaching load. If the teacher's teaching load is the same as the district default, the second number in the FTE is 1.0. If the teacher's default has been overridden, the second number is the

overridden teaching load divided by the district full-time teaching load.

B **Add**: Adds the class(es) selected under Class Search Results to the teacher.

Figure 152: Master Schedule page: By Room

A Room and building: Click the room name to view room information.

B **Add**: Adds the class(es) selected under Class Search Results to the room.

Class scheduling options

Class scheduling options determine how the PowerSchool SMS Master Schedule Builder creates and schedules classes and how it loads teachers into schedules.

During the teacher allocation process, Master Schedule Builder takes into account teacher course preferences and other constraints. For teachers who have equal preferences, Master Schedule Builder allocates teachers in a "card-dealing" method, starting with the teacher with the fewest classes. If teachers have the same number of classes, teachers are allocated randomly and not alphabetically.

To set class scheduling options: [SA][1]

1 In the Planning Calendar, in the **Admin** menu, click **Scheduling**. The Scheduling page appears.

2 For **Planning Schedule**, select a planning schedule [p. 303].

3 Click **Class Scheduling Options**. The Class Scheduling Options page appears.

4 On the Class Scheduling Options page, set the following options:

- **Name Based On**: Indicates the basis for the class name: Course Name, Short Name, Alternate Name, or Course Number.
- **Number Increment**: The number to be incremented for each new class that is created; a number between 1 to 100.

---

[1]You can do this if your role is School Administrator.

- **Style**: The format used to display class names:
  - name-number
  - name(number)
  - name[number]
  - name{number}
- **Teacher Over-Allocation Percentage**: 0 (the default) means that the Master Schedule Builder never over allocates teachers. This percentage gives the scheduling algorithm the flexibility to shift the load beyond the teacher allocation. A teacher's individual teaching load will never exceed its maximum. Depending on how high this percentage is set, a teacher might get more classes in one course and fewer classes in another course. For example, at 20%, a teacher with five classes might get one additional class (20% x 5 = 1). At 10%, a teacher with ten classes might get another class. At 34%, a teacher with six classes might get two additional classes.
- **Weighted Options for the Schedule Classes process**: Specifies factors that take priority when building schedules. By default, the Master Schedule Builder uses the following order of priority:
  - *Minimize potential student conflicts*: Classes are scheduled according to the conflict matrix to avoid schedule conflicts. If this option is moved to a higher priority than other options, student schedules have fewer conflicts, at the expense of teacher and room allocations.
  - *Use teacher course allocations*: Teachers are scheduled according to the settings in the Teacher Allocations page. If this option is not selected then teachers are allocated based only on their course preferences
  - *Use course room preferences*: Classes are scheduled according to the room preferences set for courses.
  - *Use teacher room preferences*: Classes are scheduled according to the room preferences set for teachers.

5 Click **OK**.

Recording student course requests

[Applies to **secondary** [p. 285] school scheduling.]

For each student, the School Administrator can record one or more courses that a student would like to take. A student can also make course requests via the web using Pearson's parent/student web site, *ParentCONNECTxp*™ see *Online course requests* [p. 108]. PowerSchool SMS's automatic scheduling processes, such as the Student Loader and the Walk-in Scheduler, attempts to schedule the student into a class for each *course request*. If the scheduler cannot find a suitable class for a student, it will not schedule the student into the requested course.

When recording course requests, a School Administrator can specify the priority of each request. This ensures that a lower priority course is not scheduled before a higher-priority course. The administrator can also record alternate requests. If the scheduler is not able to schedule a student into all of her requested courses, it will attempt to schedule her into alternates. Alternate requests afford the automatic scheduling processes more flexibility

for generating student schedules and increases the likelihood that the scheduler will be able to create a full schedule for a student. The administrator can set the Student Loader to disregard alternate requests.

A School Administrator can assign course and alternate requests to more than one student at a time. The administrator can copy course requests from one student to another; this also copies the course request settings for priority, term, and required/elective status; alternate course requests are not copied.

To record a course request for a student[SA1]:

1 Open the student's schedule:
    a Click **Student Search** and use the Basic search [p. 40] to find the student(s).
    b Under **Search Results**, select the student(s).
    c From the **Actions** menu, select **Open Student** > **Schedule**. The Student Schedule page appears [].
        • To record a course request for more than one student, select the students and in the **Actions** menu select **Assign > Course Requests**.
    • Or on a student's Student Demographics page [p. 56], in the **Admin** menu, click **Schedule**.
2 Under **Course Requests**, for **Course #**, enter the course number and click **Add**. Or:
    a Under **Course Search**, search for and locate the course.
    b Under **Course Search Results**, select the course.
    c Click **Add Request**. PowerSchool SMS displays the course in the list under **Course Requests**.
    • To enter more than one course number, separate the numbers by commas. **Tip**: A frequently used set of course numbers, such as that for a Grade 8 standard stream, could be saved in a text file and copied into the Course # field (place the cursor in the field and press Ctrl+v).
    • To delete a course request, select it and in the **Actions** menu select **Delete Course Request**.
3 Under **Course Requests**, for **Alternate course #**, enter the course number and click **Add**. Or:
    a Under **Course Search**, search for and locate the course.
    b Under **Course Search Results**, select the course.
    c Click **Add Alternate Request**. PowerSchool SMS displays the course in the alternate course list under **Course Requests**.
4 For each course added to the lists under Course Requests, select the course and in the appropriate column set the following information:
    • **Term**: The term this course can be used. Choices include:
        • The terms specified as offerings for this course [p. 340].
        • "None" indicates that the course can be scheduled in any available term.
        • "[P]" indicates the term is preferred but another term is acceptable.

---

[1]You can do this if your role is School Administrator.

- "[O]" indicates the course can be scheduled in the selected term only.
  - **Note**: To enable students to request one semester of a full year course, you must set up the course to allow term overrides [p. 340].
- **Priority**: When it cannot schedule a course request this setting enables the Student Loader to determine which alternate course requests to attempt to schedule first. Enter a priority from 1 (highest) to 9999 (lowest). Where two courses have the same priority, the Student Loader selects one at random.
- **Required**: Specifies that the course is "Required" or "Elective". The Student Loader gives priority to required courses. The District Administrator sets the default. Applies to required courses and electives separately.

5 Click **Save**.

To record a course request for several students at once: [SA][1]

1 On a Student Search result page [p. 48], select one or more students.

2 In the **Actions** menu select **Assign > Course Requests**. The Assign Requests page appears.

3 Under **Course Search**, search for and locate the course.

4 Under **Course Search Results**, select the course.
- **List** enables you to select a saved list of courses [p. 350].

5 Click **Add Request**. PowerSchool SMS adds the course to the **Add Requests** list.
- Click **Add Alternate** to add an alternate course request.

6 For **Priority**, enter a priority between 1 and 9999.

7 For **Course is**, select "Required" or "Elective" or "Req/Elec - From Course", which directs PowerSchool SMS to use the value specified for the course in the course catalog.

8 Click **OK**.

To copy a student's course requests to one or more other students: [SA][2]

1 Open the student(s)'s schedule:

  a Click **Student Search** and use the Basic search [p. 40] to find the student(s).

  b Under **Search Results**, select the student(s).

  c From the **Actions** menu, select **Open Student > Schedule**. The Student Schedule page appears [].

2 Under **Course Requests**, select the course requests.

3 In the **Edit** menu, click **Copy Fields > Course Requests**. The Copy Student Course Requests page appears.

4 Under **Fields to Copy**, select **Course, Required/elective, Priority, Term, Preference/override, Scheduling config**.

---

[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.

5 Under **School Students to Copy To**, search students. PowerSchool SMS displays the search results under **Available School Students**.

6 Move the students to the **Selected School Students** list.

7 Click **OK**.

Saved lists of courses

A saved lists of course requests facilitates the recording of course requests. When using a saved list of courses, the administrator can record some or all of the courses in the list as course requests. The administrator can record a list of course requests to a save list of students [p. 46].

To save a list of courses: [SA][1]

1 In the control bar, click **Scheduling**. On the Scheduling page, click **Course Setup**.
   * Or, in the control bar, click **School Setup**. On the School Setup page, click **Courses**. The Course List page appears.

2 Under **Course Search**, locate the courses.

3 Under **Search Results**, select the relevant courses.

4 In the **Actions** menu, select **Save to List**. The Save To List page appears.

5 Select **Create new list**.
   * Or select **Add to existing list** and choose a saved list.

6 Set the **List name** and **Description**.

7 Click **OK**.

To use a saved list of courses to record course requests for a saved list of students: [SA][2]

1 On a Student Search result page [p. 37], in either a **Basic** or **Detail** search, for <u>**Select a field...**</u>, select "School Student saved list".

2 Click **Search**.

3 Under **Search Results**, select the students.

4 In the **Actions** menu, click **Assign > Course Requests**. The Assign Requests page appears.

5 Under **Course Search**, in either a **Basic** or **Detail** search, for the first criterium select "Course saved lists". Select the operator "equals" and then select a saved lists of courses to complete the criterium.

6 Click **Search**. PowerSchool SMS displays the results under Course Search Results.

7 Under **Course Search Results**, select the course.
   * **List** enables you to select a saved list of courses [p. 350].

8 Click **Add Request**. PowerSchool SMS adds the course to the **Add Requests** list.
   * Click **Add Alternate** to add an alternate course request.

9 For **Priority**, enter a priority between 1 and 9999.

---

[1]You can do this if you role is School Administrator.
[2]You can do this if your role is School Administrator.

10 For **Course is**, select "Required" or "Elective" or "Req/Elec - From Course", which directs PowerSchool SMS to use the value specified for the course in the course catalog.

11 Click **OK**.

Analyzing student course requests

Once the School Administrator has set up a scheduling structure for a planning schedule [p. 303], specified the courses offered, and recorded student course requests for the coming year, she can analyze course requests to locate potential scheduling conflicts and fine tune the classes needed.

PowerSchool SMS's Course Request Tally page [*Figure 153*] [*Figure 154*] enables the School Administrator to:

- Work with offered courses.
- View and adjust the list of students with primary and alternate requests for courses.
- View and adjust the optimal, minimum, and maximum class size for each course.
- Search for courses with a user-defined number of potential conflicts.
- Generate a conflict matrix for selected courses or for all courses.
- Determine the number of classes needed for each course, with the option to override the calculated value.
- Create the classes needed for each course.

To analyze course requests and adjust class size: [SA][1]

1 In the Planning Calendar, under **Admin**, click **Scheduling**. The Scheduling Page appears.

2 Click **Course Request Tally**. The Course Request Tally page appears [*Figure 153*] [*Figure 154*].
- This page displays all courses offered at the school.

3 In the **Course Search** section, click **Display All Records**.
- Or, use a **Basic** [p. 37] or **Detail** [p. 37] search to generate a relevant list of courses from the district's course catalog. PowerSchool SMS runs the search and displays matching courses (if any) under **Search Results**.

4 Under **Search Results**, locate the course with which to work.
- The administrator can adjust which columns are displayed in the grid [p. 48].

5 Review the number of unfulfilled primary requests (**Prim Reqs**) and alternate requests for the courses.

6 Reduce the number of the number of unfulfilled primary requests by adjusting class sizes: click in the **Min Size** or **Max Size** column.

7 Click **Save**.

---

[1]You can do this if your role is School Administrator.

Figure 153: Course Request Tally page

A **Course Name**: Click the name to view the course's details in the course catalog. This gives access to scheduling and offerings.

B **Prim Reqs**: The number of times this course appears as a primary request for a student. Click to view a list of the students with primary requests for this course.

C **Alt Reqs**: The number of times this course appears as an alternate request for a student. Click to view a list of the students with alternate requests for this course.

D **Unscheduled Primary**: Indicates the number of students that have a primary request for that course that is not scheduled (that is, the Student Loader could not schedule it). Click the number to view the students and to try to give these students the course they requested.

E **Alts Used**: Indicates the number of students whose primary request was not scheduled and where an alternate request had to be used. Click the number to view the students and to try to give these students.

F **Opt Size**: The optimum number of students for a class in this course.

G **Avg Size**: Average Class Size = primary requests / actual number of classes created. If the average class size is below the minimum size for this course, this number is displayed in bold black with an alert. If the average class size is over the maximum, this number is in bold red with an alert.

H **Classes Needed**: Classes Needed = primary requests / optimal class size (rounded up to a whole number). For example, if you have 55 primary requests and the optimal class size is 20, PowerSchool SMS calculates the classes needed to be 3. If you have 65 primary requests, the classes needed would be 4. If you override the optimal class size to 22, the number of classes needed changes to 3.

"~" beside the number indicates that the calculated number has been overridden. If this line is not locked, the next time

you run Calculate Classes Needed, Master Schedule Builder replaces this number with the calculated value.

I **Classes Created**: The number of classes that have actually been created in the master schedule.

J **Min Size**: The minimum number of students that need to be scheduled in this course for a class to be scheduled.

K **Max Size**: The maximum number of students that can be scheduled into a single class in this course.

L **Lock**: Locks the line to prevent any automatic process from changing the line. The administrator can manually change locked items.

M Columns not displayed include:

% Prim Reqs Sched: The percentage of primary requests scheduled out of the total number of primary requests. Blank until after student schedules are loaded.

% Alt Reqs Sched: The percentage of alternate requests scheduled out of the total number of alternate requests. Blank until after student schedules are loaded.

Figure 154: Course Request Tally example

The circled numbers are displayed on the Course Requests Tally page [*Figure 153*]. In this example, the number of primary and alternate course requests that can and cannot be scheduled, and shows which numbers PowerSchool SMS displays on the Course Request Tally page [*Figure 153*]. These numbers are filled in progressively as the administrator does his scheduling.

In this example, if there is a total of 100 requests for a course, where 80 are primary requests and 20 are alternate requests, the Course Request Tally page displays the number of primary and alternate requests. If the Student Loader can schedule 60 of the 80 primary requests, the course request tally shows the 20 primary requests that cannot be scheduled in the Unscheduled Primary column. If the Student Loader can schedule 10 of the 20 alternate requests, this page shows the 10 alternate requests that can be scheduled in the Alts Used column.

Load student schedules

[Applies to **secondary** [p. 285] school scheduling.]

Run the student loader to automatically assign students to classes based on student course requests and student loading rules [p. 310].

To load student schedules:

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

2 Click **Load Students**. The Load Students page appears.

3 View a list of students [*Figure 35*] and on the Student Search page, under **Student Search Results**, select the student(s).

4 In the **Actions** menu, click **Load Students**.
   - Once grades or attendance are entered in the Active Calendar, the Student Loader is no longer available. Courses and classes can be assigned to students from the Student Schedule page.

Assign resource services

[Applies to **elementary** [p. 282] and **secondary** [p. 285] school scheduling.]

A *resource service* is specialized assistance or instruction, such as Remedial Reading, Remedial Math, Speech Therapy, Gifted and Talented Enrichment, provided to a single student or a small group. Typically, a specialist teacher delivers such services, often moving from school to school to do so. The specialist teacher delivers the service through an existing class (an "inclusion", typically in a related subject) or in an existing class's time slot but as a separate "pull-out" session.

The School Administrator assigns resources services to students. Drawing on a list of such services set up for use at the school [p. 88], the administrator can assign a service to one or more students at a time. **Note**: The administrator can assign a resource service only in the Active Calendar [p. 172].

To assign a resource service to a student[SA[1]]:

1 In the Active Calendar, In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
   - Or, the administrator can assign a service to a student using that student's Student Schedule [].

2 Click **Resource Roster**. The Resource Roster page appears. PowerSchool SMS displays a list of students to whom one or more resources services are assigned.
   - Use **View** to filter the list by a specific service or assignment.
   - To display students who received a service in the past, from the **Edit** menu select **Show Past Students** (to remove these students from the list select **Hide Past Students**).
   - To display students who are scheduled to receive a service in the future, from the **Edit** menu select **Show Incoming Students** (to remove these students from the list select **Hide Incoming Students**).

3 From the Actions menu, select **Add Resource Assignment**. The Add Resource Assignment page appears.
   - To adjust an assignment, under **Resource Service**, click the service name.

---

[1]You can do this if your role is School Administrator.

- To delete an assignment, select it and from the **Edit** menu select **Delete Resource Assignment**.
- To duplicate the assignment, select it and from the **Edit** menu select **Copy Resource Assignment**.

4 Adjust the assignment information as necessary, which includes:
- **Student name**: Enter a student by clicking <u>**Select student...**</u> and searching for him or her.
- **Resource service**: The service to be assigned. You can select from those services available to the school [p. 356]. **Note**: After you save this record, this field is view-only.
- **Related subject**: Any related subjects defined for this service [p. 356].
- **Comment**: Notes of up to 500 total characters.
- **Start** and **End**: The dates between which the service is to be delivered.
  - If during the year, a student's resource schedule changes, an easy way to make the change is to duplicate the assignment and change the Start and End dates.
- **Instructional model**: How the service is to be delivered. Options are **Inclusion in regular classroom** or **Pulled out to room** (specify a room).
- **Teacher**: The default teacher for this service.
- **Other teacher**: An optional team teacher.
- **Minutes per week**: The number of minutes (between 1 and 9999) this student receives this service each week.
- **Meeting times**: The time at which the student and teacher meet.

5 Click **OK**. The Student Schedule page appears on which PowerSchool SMS identifies the assignment [*Figure 155*].

Figure 155: Student Schedule: resource assignment

☐	FYT		Creative Arts 5 (5B)	Petrick, Guillermo	109 (SCHBG)	▦
☐	FYT		Remedial Math 5 (5B)	Petrick, Guillermo	109 (SCHBG)	▦
☐	FYT		Spanish Language 5 (5B)	Petrick, Guillermo	109 (SCHBG)	▦
☐	FYT	P2	Spanish Language 6 [1]	Raphael, @Sandra		▦
☐			CPS-Name2 🔧 ◁—Ⓐ	Perone, O		

A Resource assignment indicator

To remove a resource service assigned to a student [SA][1]:

1 On the Student Schedule page [], select the resource service to remove.
- Or open the Resource Roster: in the **Admin** menu, select **Scheduling**, then click <u>**Resource Roster**</u>.

2 For **Changes Effective**, set the date on which any changes should take effect.

---

[1]You can do this if your role is School Administrator.

3 From the **Actions** menu, select **Delete Resource Assignment....** PowerSchool SMS displays the student's revised schedule and deletes any record of the resource assignment.

4 Click **OK**.

Resource service setup

The School Administrator can set up resource services for use in the school.

To set up a resource service: [SA][1]

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

2 Click <u>Resource Services</u>. The Resource Services page appears.

3 To add a new resource services, from the **Actions** menu, select **Add Resource Service**. The Add Resource Service page opens.

- To adjust a service, under **Resource Service Name**, click its name. The Edit Resource Service page appears.
- To delete a service, select it and from the **Actions** menu select **Delete Selected Resource Service**.

4 Adjust the service's information as necessary, which includes:

- **Resource service name**: A name for the service, such as Reading Recovery.
- **Short name**: An abbreviated name, which PowerSchool SMS displays elsewhere in the system.
- **Service number**: A number for the service.
- **Related subject/Related course**: One of the school's subjects/courses or subject/course elements that pertains to this service. The teacher of the related subject information about his or her student's resource assignments see *My Classes home page* [p. 16].
- **Default Teacher**: (Optional) The default teacher for this service.

5 Click **OK**.

Select the planning schedule that will become active when YEP is run

[Applies to **elementary** [p. 282] and **secondary** [p. 285] school scheduling.]

In the Planning Calendar [p. 172], you can create one or more planning schedules [p. 303] with which to try out different scheduling options. When the administrator conducts Year End Processing (YEP) [p. 450], she must select one planning schedule to be active.

Set up a schedule structure

[Applies to **elementary** [p. 282] and **secondary** [p. 285] school scheduling.]

A schedule structure describes the days and times that a school's homerooms and classes meet. A schedule structure is mandatory for a secondary school

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[1]You can do this if your role is School Administrator.

and optional for an elementary school. A scheduling structure enables a School Administrator to:

- View student, teacher, and room schedules in a matrix format.
- Search for classes according to meeting time.
- Have PowerSchool SMS track the number of instructional minutes allocated to each class, which an administrator can view through a custom report [p. 127].

Scheduled classes are particularly useful in the following scheduling structures:

- *Self-contained homerooms*: Whereby a homeroom teacher teaches most classes and the classes are not assigned a specific instructional time (that is, a meeting pattern). The teacher can choose when and how to teach the subjects. Certain classes, such as Music and Physical Education, may be taught by a different teacher in a different room. Such classes are assigned specific instructional times.
- *Fully-scheduled, discrete classes*: Whereby the homeroom teacher teaches most classes and every class is assigned a specific instructional time (that is, a meeting pattern). Some classes are taught by a different teacher in a different room and such classes are part of the fully-scheduled day for each student and teacher.
- *Multiple tracks*: Whereby students are assigned to a homeroom meeting pattern set up as a track. In this structure, a student only attend classes when "on track", that is, his or her track is in session. Also, attendance for a student is taken only when he or she is on track.

A School Administrator can set up a scheduling structure in either the Active Calendar [p. 172] or Planning Calendar [p. 172]. In the Planning Calendar, the administrator can set up a separate schedule structure for each planning schedule [p. 303]. Setting up a schedule structure involves:

- *Defining scheduling groups* [p. 357]
- *Setting up term sets at a secondary school* [p. 359]
- *Defining day patterns and Special Days* [p. 360]
- *Setting up bell schedules* [p. 364]
- *Setting up meeting patterns* [p. 367]

The scheduling structure can affect data mapping [p. 376].

Defining scheduling groups

[Applies to **elementary** [p. 282] and **secondary** [p. 285] school scheduling.]

A *scheduling group* is a group of students that follows the same bell schedule and meeting patterns. In a secondary school, a scheduling group in addition to following the same bell schedule and meeting patterns also uses the same term set and term dates. A School Administrator can use a scheduling group to group different types of classes. For example, you can create a homeroom bell schedule with only A.M. and P.M. blocks and a class bell schedule that covers a six period day.

At an elementary school, by default, a PowerSchool SMS system has two scheduling groups: one for homerooms and one for classes [p. 358]. The administrator can change these default groups. At a secondary school, the administrator can add more types of scheduling groups, each with its own term set, term dates, bell schedules and meeting patterns. For example, an administrator could set up scheduling groups by grades, such as a Junior group for grades 9 and 10, and a Senior group for grades 11 and 12, or scheduling groups by programs, such as an Accelerated group for the Advance Placement and Honors classes, and a Regular group for the regular classes, or set up a separate scheduling group with a different bell schedule for double-block classes. Later, when the administrator sets up term sets and term dates, she can define the start and end dates of each term for each scheduling group.

To work with a scheduling group: [SA][1]

1   In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2   Click <u>Scheduling Groups</u>. The Scheduling Groups page appears.
3   In the **Scheduling Group Name** column click a group's name to edit it. The Edit Group page appears.
    - Or select the group and from the **Actions** menu, select **Edit Groups...**.
    - To create a new scheduling group, in the **Actions** menu select **Add Group...**.
    - To delete a scheduling group, select the group and in the **Actions** menu select **Delete Group**. Deleting a group also deletes its bell schedules and meeting patterns. The administrator cannot delete a group that is specified as a default scheduling group or is assigned to any classes.
4   Enter or change the group's **Name**, **Code**, or **Description**.
5   Click **OK**.

Note: For data mapping [p. 376], the bell schedule must be the same in all scheduling groups, that is, the period codes and period start and end times must be the same. You can create different meeting patterns based on the bell schedules to accommodate different class types.

Default scheduling group assignment—elementary schools

When an elementary School Administrator creates a new homeroom or class, PowerSchool SMS automatically assigns it to a scheduling group. By default, PowerSchool SMS assigns a homeroom to the homeroom scheduling group and a class to the classes scheduling group. You can change this default assignment. For example, an administrator may want to assign all homerooms and classes to the same scheduling group. Note: A change to the default assignment only affects a class or homeroom created thereafter.

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[1]You can do this if your role is School Administrator.

To change the default scheduling group assignment at an elementary school: [SA][1]

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2 Click <u>Scheduling Defaults</u>. The Scheduling Defaults page appears.
3 For **For homerooms**, select a scheduling group from the list.
4 For **For classes**, select a scheduling group from the list.
5 Click **OK**.

Setting up term sets at a secondary school

[Applies to **secondary** [p. 285] school scheduling.]

A *term set* enables a School Administrator to divide the school year into segments. A term set consists of one or more terms in sequence, each with a start and end date. For example, a school on a semester system would have a term set with two terms; a school on a trimester schedule would employ a term set with three terms.

The administrator can put classes into more than one term set; that is, some students can follow one term set and others follow another term set. The administrator can also put a student into classes in different term sets.

The administrator can create as many term sets as necessary. A scheduling group [p. 357] is assigned one term set.

To work with a term set: [SA][2]

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2 Click <u>Scheduling Term Sets</u>. The Term Sets page appears displaying a list of term sets.
3 Under **Term Set Name**, click a term set to work with it. The Edit Term Set page appears.
   - Or, select a term set and in the **Actions** menu select **Edit Term Dates...**.
   - To delete a term set, select it and in the **Actions** menu select **Delete Term Set**.
   - To create a new term set, in the **Actions** menu select **Add Term Set...**.
4 Adjust options, including **Term set name**.
   - To add a new term, in the **Actions** menu select **Add Term** and enter the name and **Code** in the appropriate column.
   - To delete a term, select it and in the **Actions** menu select **Delete Term**.
5 Click **Continue**. The Term Dates page appears.
6 Set options, which include:

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[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.

- **Use this Term Set for this Scheduling Group**: Deselect this option only temporarily when setting up a planning schedule [p. 303]. This option must be selected to enter term dates or copy this term set to other groups. If this option is not selected when you click **OK**, PowerSchool SMS deletes all term dates.
- **Scheduling Group**: Select a group to which this term set should apply.
- Copy to other groups: Click to copy these term dates to one or more other scheduling groups.
- **School Year**: Indicates the full date range of all term sets. These dates cannot fall outside the school's calendar.

7 Adjust terms:
- **Start**: Enter a start date for each semester. A semester's Start date cannot overlap another semester's End.
- **End**: Enter an end date for each semester. A semester's End date cannot overlap with another semester's Start.

8 Click **OK**.
- Or, click Edit term set to return to the Edit term set page.

Note: For data mapping [p. 376], the administrator can define a maximum of 12 unique term ranges for each school year. If the administrator can combine terms to form another term, that term does not count toward the maximum number of allowed terms. For example, if there are three term sets (year, quarters, and semesters) then the total number of terms is seven (1 + 4 + 2). However, since the quarters can be combined to form both the semesters and the year, only the four terms in the quarters are counted toward the maximum number of terms. Terms within the same term set cannot overlap.

Defining day patterns and Special Days

[Applies to **elementary** [p. 282] and **secondary** [p. 285] school scheduling.]

A *day pattern* is a cycle of days on which a school operates. The pattern offers the administrator a set of discrete days, typically four or five, which occur in order each of which can have a separate bell schedule. This enables the administrator to specify which classes are offered on particular days in the pattern.

A school can employ only one day pattern for the active schedule (although, for trial purposes, the administrator can employ a different day pattern for each planning schedule [p. 303]). Two types of day patterns are available for use at a school: a Days-of-the-Week Pattern which cycles through the fives days of the week (Monday to Friday), or a Relative-Days Pattern which cycle through a number of days, such as four (days 1, 2, 3, and 4, then back to 1 again) [p. 362].

For additional scheduling flexibility, a School Administrator can set up one or more *Special Days* [p. 362]. A Special Day has its own bell schedule for its specific purpose. Examples of Special Day include parent-teacher interview day, professional development day, early dismissal day, and sports day. A School Administrator can schedule a Special Day as a one-off or have it recur, such as every 10 days. Also, if necessary, a School Administrator can

have a specific day in a Relative-Days Pattern start on a specific date [p. 363].

A Special Day can enable a School Administrator to apply a shorter Relative-Days Pattern while still accommodating Special Days that have a different schedule. For example, an administrator could apply a four-day pattern and have an early dismissal Special Day once a month (this would be instead of applying a 30-day Relative-Days Pattern wherein the 30th day would have a bell schedule suitable for early dismissal).

Note: Data mapping [p. 376] does not support Special Days. Use the same day schedule for all days in the day pattern. You can create different meeting patterns based on the bell schedule to accommodate different class types. The administrator can apply a Relative-Days Pattern to a specific date and have PowerSchool SMS begin using that relative day on that date. For example, if the school was unexpectedly closed due to heavy snow on Day 2, you can apply Day 2 to the following day.

To apply a day pattern to a school: [SA][1]

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2 Click **Day Pattern**. The Day Pattern page appears.
3 Under **Regular Days**, select the pattern: **Days of the week** or **Relative days**.
   - For a Days-of-the-Week Pattern, you can change a day's code: in the **Code** column, click it and type a new code.
   - To include Saturday or Sunday in a Days-of-the-Week Pattern, a District Administrator add them as normal school days to the Day Types setup list.
4 Click **OK**.

For a Days-of-the-Week Pattern, a School Administrator can adjust the length of the week to include a day such as a Saturday. For an additional day of the week to be available, an administrator must set it up as a normal school day in the Day Types setup list.

To adjust a Days-of-the-Week Pattern: [SA][2]

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2 Click **Day Pattern**. The Day Pattern page appears.
3 Under **Regular Days**, select **Days of the week**.
4 For each day in the pattern:
   - In the **Code** column, click in the row for that day and type a code; for example "F". Note: The administrator cannot change the **Name** of a regular day of the week.
   - To add a day, such as a Saturday, from the **Actions** menu select **Add Regular Days**.

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[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.

- To delete a regular day from a Days-of-the-Week Pattern, select it and from the **Actions** menu select **Delete Regular Day**.

5 Click **OK**.

Setting up a Relative-Days Pattern

To employ a Relative-Days Pattern at a school, the School Administrator must set it up in advance.

To set up a Relative-Days Pattern: [SA][1]

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2 Click Day Pattern. The Day Pattern page appears.
3 Under **Regular Days**, select **Relative days**.
4 For each day in the pattern:
- In the **Day Name** column, click in the row for the day and type a name; for example, "Day Two".
- In the **Code** column, click in the row for that day and type a code; for example "D2".
- To add a row for an additional day, from the **Actions** menu select **Add Regular Days**.
- To delete a regular day from a Relative-Days Pattern, select it and from the **Actions** menu select **Delete Regular Day**.
5 Click **OK**.

Setting up and applying a Special Day

To employ a Special Day at a school, the School Administrator must:

- Set up the Special Day for use at the school.
- Define a bell schedule for the special day.
- Assign a day type to the Special Day.
- Assign the Special Day to a calendar date.

To set up a Special Day:

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2 Click Day Pattern. The Day Pattern page appears.
3 Under **Special Days**, for each Special Day:
- In the **Day Name** column, click in the row for the day and type a name; for example, "Early Dismiss for PTI".
- In the **Code** column, click in the row for that day and type a code; for example "E-PTI".
- To add a row for an additional day, from the **Actions** menu select **Add Special Days**.
- To delete a Special Day, select it and from the **Actions** menu select **Delete Special Day**.
4 Click **OK**.

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[1]You can do this if your role is School Administrator.

To define a bell schedule for the Special Day: [SA][1]

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2 Click <u>Bell Schedules</u>. The Bell Schedules page appears.
3 For **Day**, select the Special Day.
4 In the Actions menu, select **Add Period**. The Add Period page appears.
5 Set options [p. 364].
6 Click **OK**.
7 Click **OK**.

To assign a day type to the Special Day: [SA][2]

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.
2 Click <u>Day Types (setup list)</u>. The Day Types page appears.
3 In the **Actions** menu, select **Add Day Type...**. The Add Day Type page appears.
4 Set options:
   - To set the bell schedule for this day, for **Instructional day** select "Yes" and for **Use for defaults in day type list settings** select "No".
5 Click **OK**.
6 Click <u>Scheduling</u>. The Scheduling page appears.
7 Click <u>Bell Schedules</u>. The Bell Schedules page appears.
8 For **Day**, select the Special Day.
9 Click **OK**.

To assign the Special Day to a calendar date: [SA][3]

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.
2 Click <u>Calendar Day Exceptions</u>. The Calendar Day Exceptions page appears.
3 In the **Actions** menu, click **Add Exception Day...**. The Add Exception Day page appears.
4 For **Day Type**, select the day type you created for the Special Day.
5 Set other options, including the **Date**.
6 Click **OK**.
   - If your school uses a Relative-Days Pattern, "**Continue**" replaces "OK"; this enables the administrator to apply a relative day to the day following this Special Day.

Starting a Relative-Days Pattern

Once a Relative-Days Pattern is set up (typically in the Planning Calendar [p. 172]), a School Administrator can apply it. To do so, the administrator must specify the date on which the pattern's first day begins. **Note**: You can apply

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[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.
[3]You can do this if your role is School Administrator.

a Relative-Days Pattern only to dates for which attendance has not been taken [p. 76], except future dates, where PowerSchool SMS deletes the attendance for those dates when a pattern is applied. In these circumstances, PowerSchool SMS also deletes attendance codes assigned by student behavior actions [p. 89]. However, student behavior attendance codes are reassigned on a day-by-day basis when the day is initialized .

To have a specific day in a Relative-Days Pattern start on a specific date, the administrator must be working in the Active Calendar [p. 172]. For example, if a school unexpectedly closed due to heavy snow on Day 2, the School Administrator could have Day 2 start on the following day. You must complete this step in the Active Calendar.

To apply a Relative-Days Pattern: [SA][1]

1 In the Active Calendar [p. 172], In the **Admin** menu, click **School Setup**. The School Setup page appears.
2 Under **Calendar**, click **Relative Day Pattern**. The Relative Day Pattern page appears.
3 Under **Apply Regular Day Pattern**, for **Start pattern using day** select the day from the pattern on which you want the cycle to start.
4 For **As of Date** select the date you want cycle to begin.
5 Click **Apply Day Pattern**. Under Calendar Day List, PowerSchool SMS displays the schedule according to your changes.

Setting up bell schedules

[Applies to **elementary** [p. 282] and **secondary** [p. 285] school scheduling.]

A *bell schedule* specifies the start time and duration of one or more instructional periods on each day of a day pattern. A School Administrator sets up one bell schedule for each scheduling group [p. 357]. For example, a school can have one bell schedule for the "Homerooms" scheduling group and a different bell schedule for the "Classes" scheduling group. You can define a different schedule of periods for each day in a day pattern [p. 360].

You set up a bell schedule by adding periods to each day of a day pattern. Once you have set up the periods for a particular day, you can copy those periods to other days in the bell schedule [p. 366]. After you set up periods for all days in the day pattern, you can copy the entire bell schedule to other scheduling groups [p. 367].

Note: To support data mapping, every day in a day pattern must have the same bell schedule/period structure, including the same periods and the same number of instructional minutes in periods with the same code. For example, if on Monday, period 1 had 50 instructional minutes, period 1 must have 50 instructional minutes for every other day in the day pattern. Periods within one day can have different amounts of instructional minutes. Also, each day in the day pattern can have a maximum of 42 periods and those

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[1]You can do this if your role is School Administrator.

periods cannot overlap. If more than one scheduling group is defined (for example, to support exception days), the bell schedule must be the same in both scheduling groups, that is, the period codes and period start and end times must be the same.

Figure 156: Bell Schedules page
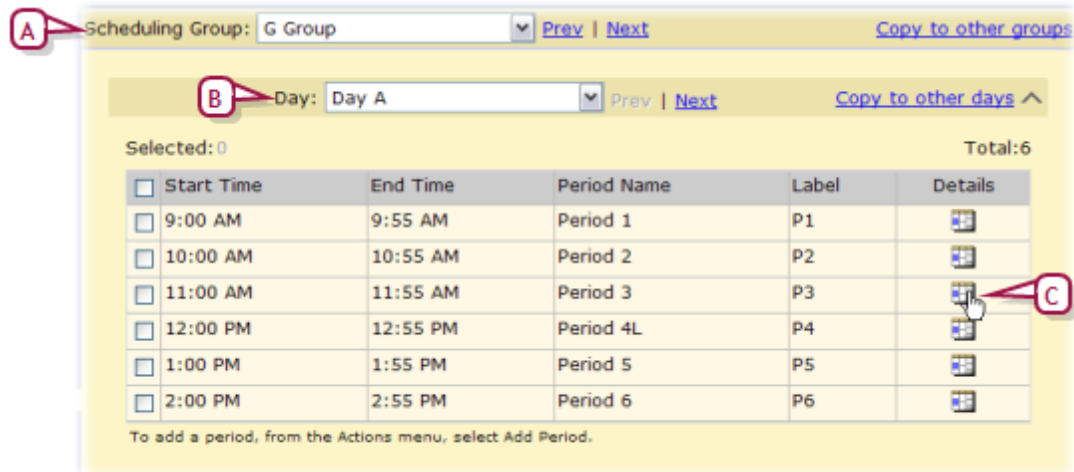
A   **Scheduling Group**: The group to which this bell schedule applies.
B   **Day**: The day in the day pattern to which the periods apply.
C   **Details**: Hold the cursor over the icon to view a summary of this period. Click to edit the period.

To set up a bell schedule: [SA][1]

1   In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2   Under **Step 2**, click **Bell Schedules**. The Bell Schedules page appears [*Figure 156*].
3   For **Scheduling Group**, select the scheduling group with which you want to work.
4   For **Day**, select the day you want to set up.
5   Add or delete periods for the day
   • To add a period, from the **Actions** menu, select **Add Period**.
   • To delete a period, select the period and from the **Actions** menu, select **Delete Period**.
6   Adjust the characteristics of each period: select the period and from the **Actions** menu, select **Edit Period** or in the **Details** column click the icon. The Edit Period page appears. This page includes the following:
   • **Start Time**: The period's starting hour. The start time can be after the preceding period's end time.
   • **End Time**: The period's ending hour.
   • **Period Name**: The period's name.
   • **Period Label (short code)**: A short code for the period.

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[1]You can do this if your roles is School Administrator.

- **Print on Schedules**: When checked, PowerSchool SMS displays this period on student or teacher schedules.
- **Use for classes**: If checked, this period is available for use in meeting patterns [p. 367].
- **Include in daily attendance code calculation rules**: This option only applies if attendance is taken by class [p. 76]. If checked, this period is available for use in attendance calculation rules.
- **Include in instructional/attendance minutes calculations**: If checked, PowerSchool SMS includes this period in instructional or attendance minutes calculations. You cannot change this option if the period is part of a meeting pattern and attendance has been taken for a class using that meeting pattern
- **This period is part of regular school hours**: If checked, PowerSchool SMS includes this period in instructional minutes calculations as regular school hours. For example, the school offers academic programs in the evenings or on weekends and you want PowerSchool SMS to include them when it calculates instructional minutes for regular school hours. Note: To include a period in regular school hours for some classes but not others, create two scheduling groups.
- **For this period only**: The amount of instructional time in the period, typically the number of minutes between the start and end time. If you do not enter a value, when you close this page, PowerSchool SMS calculates the value using the difference between the start and end times; for example, if a period starts at 9:00 and ends at 9:50, PowerSchool SMS calculates 50 minutes. In some circumstances, the instruction time is less than the meeting time; for example, where a gym class meets for 65 minutes but there is 10 minutes for changing, enter 55.
- **Passing Time Minutes to Include for Blocked Classes**: Where a class spans more than one period, this specifies how much time to set aside as non-instructional, typically time to enable students to change locations. For example, if a two-period Chemistry class totals 70 minutes and includes one period in the classroom and one period in the lab, with students using the four minutes between periods to go from the classroom to the lab then **For this period only** would be 66 and **Passing time minutes to include for blocked classes** 4. However, if the two-period chemistry class is both in the lab then the four minutes would be considered instruction time and **For this period only** would be 70 and **Passing time minutes to include for blocked classes** 0.

Copying a day's schedule to another day

The administrator can set up periods for a day and then copy those periods to other days in the same bell schedule. Caution: Copying a day's schedule to another day may affect daily code calculation rules, meeting patterns, or exception day types.

To copy a day's schedule to another day in the day pattern:

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

2 Under **Step 2**, click <u>**Bell Schedules**</u>. The Bell Schedules page appears [*Figure 156*].

3 For **Scheduling Group**, select the scheduling group with which you want to work.

4 For **Day**, select the day from which you want to copy.

5 Click <u>**Copy to other days**</u>. The Copy to Days page appears.

6 Add the day(s) to which you want to copy to the **Copy to Day (s)** column.

7 Click **OK**.

Copying a bell schedule to another scheduling group

After you set up periods for all days for a scheduling group, you can copy the bell schedule for all the days to other scheduling groups. Caution: Copying a bell schedule to another scheduling group may affect daily code calculation rules, meeting patterns, or exception day types.

To copy the bell schedule for all days in one scheduling group to another: [SA][1]

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

2 Under **Step 2**, click <u>**Bell Schedules**</u>. The Bell Schedules page appears [*Figure 156*].

3 For **Scheduling Group**, select the scheduling group with which you want to work.

4 Click <u>**Copy to other groups**</u>. The Copy to Groups page appears.

5 Add the group(s) to which you want to copy to the **Copy to Scheduling Group(s)** column.

6 Click **OK**.

Setting up meeting patterns

[Applies to **elementary** [p. 282] and **secondary** [p. 285] school scheduling.]

A *meeting pattern* is a series of one or more periods when a class is to meet. At a school with several meeting patterns set up in its scheduling structure, the School Administrator can assign a meeting pattern to any newly set up class [p. 325].

To view a school's meeting patterns: [SA][2]

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

2 Under **Step 2**, click <u>**Meeting Patterns**</u>. The Meeting Patterns page appears [*Figure 157*].

3 For **Meeting Patterns for Scheduling Group**, select the scheduling group you want to view.

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[1]You can do this if your roles is School Administrator.
[2]You can do this if your roles is School Administrator.

4 Under **Name**, click a meeting pattern to view it. The Edit Meeting Pattern page appears.

- Or, select one or more meeting patterns and click **Update View**. PowerSchool SMS displays the selected meeting pattern(s) in grid form.

Figure 157: **Meeting Patterns page**
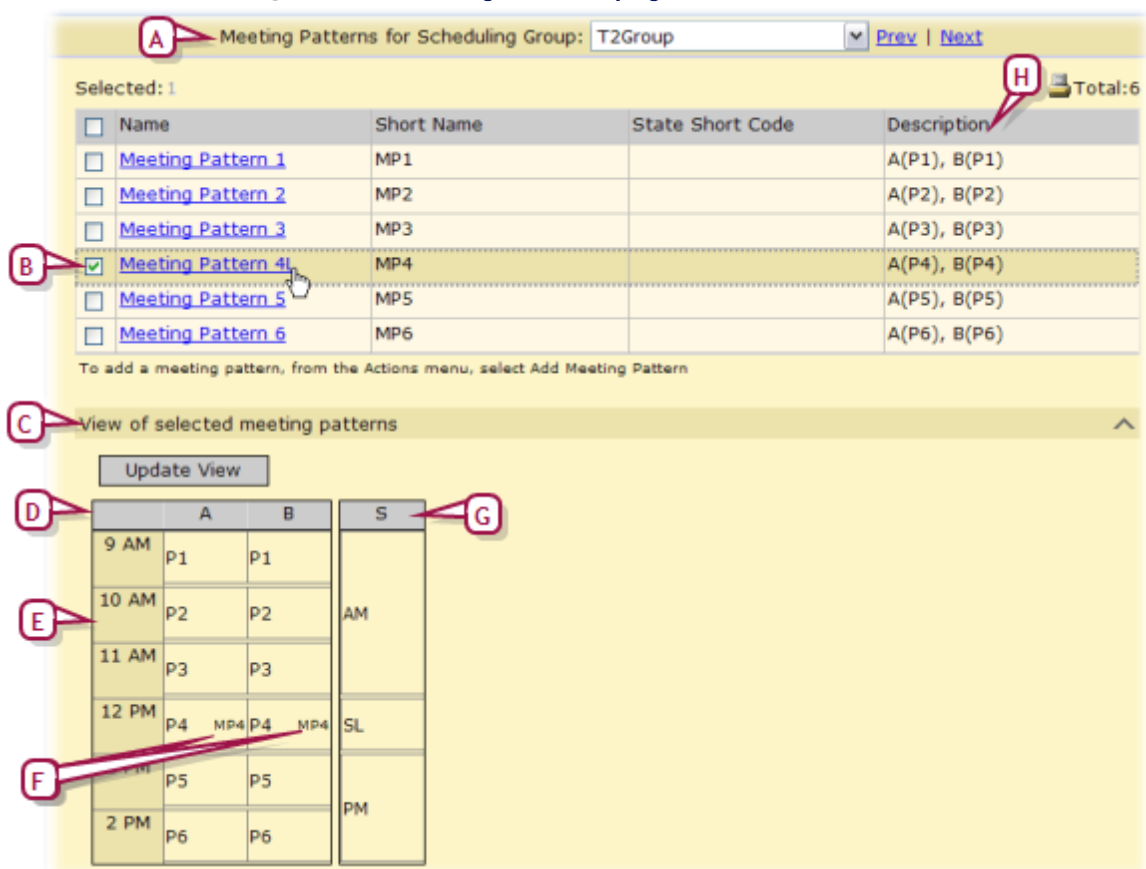
A **Meeting Patterns for Scheduling Group**: The group to which these meeting patterns apply.

B Selected meeting pattern

C **View of selected meeting patterns**: Displays the selected meeting pattern on a timetable grid after **Update View** is clicked.

D Timetable grid

E Period: One of six in this day.

F Periods in the selected meeting pattern ("MP4")

G Day: One of three in this day pattern.

H **Description**: A text summary of the meeting pattern's days and periods.

The administrator defines a meeting pattern by choosing periods from a existing bell schedule. We recommend that the administrator name the meeting pattern in a way that indicates when the class meets. A School Administrator sets up one or more meeting patterns for each scheduling group [*Figure 157*]. If your schools uses a multiple track schedule [p. 308], you can also use a meeting pattern as a track.

To set up a meeting pattern: [SA][1]

1   In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

2   Under **Step 2**, click **Meeting Patterns**. The Meeting Patterns page appears [*Figure 157*].

3   For **Meeting Patterns for Scheduling Group**, select the scheduling group with which you want to work.

4   Add or delete meeting patterns:
   - To add a meeting pattern, in the **Actions** menu click **Add Meeting Pattern**.
   - To delete a meeting pattern, select the meeting pattern and in the **Actions** menu click **Delete Meeting Pattern**.

5   Adjust each meeting pattern: To edit a meeting pattern, in the **Name** column click its name or select meeting pattern and in the **Actions** menu click **Edit Meeting Pattern**. The Edit Meeting Pattern page appears [*Figure 158*]. This page includes the following information:
   - **Meeting Pattern Name**: A descriptive name enables an administrator to quickly determine meeting times.
   - **Short Name**: PowerSchool SMS uses this on other system pages.
   - **Meeting Pattern**: Select the periods in the day pattern during which class meetings take place. To include blocked periods in the pattern [*Figure 158*], select two or more consecutive periods in a day.

Figure 158: Edit Meeting Pattern page

A Class meetings
B Blocked periods: For a school to offer a class in a blocked period, the administrator can set up a meeting pattern that has multiple, consecutive periods. Caution: Do not use the **Add More Detail** link on the Master Schedule page to create double periods by assigning multiple meeting patterns to a class. The More Detail option creates multiple rows for the class in the database, which can be confusing on other pages, such as the Class Search page.

Subject exceptions

[Applies to **elementary** [p. 282] school scheduling.]

Using a *subject exception*, the elementary School Administrator can schedule a student to a subject outside his or her peer grade level without removing that student from the classes automatically scheduled for the student's grade level. For example, for a Grade 3 student who is working at a Grade 4 level in Math, the administrator can assign the student to Math 4 within the Math 3 classroom. **Note**: A subject exception can affect grading [p. 204].

To assign a subject exception[SA[1]]:

1 Open the student(s) schedule:
  a Click **Student Search** and use the Basic search [p. 38] to find the student(s).
  b Under **Search Results**, select the student(s).
  c From the **Actions** menu, select **Open Student** > **Schedule**. The Student Schedule page appears [].
  • Or on a student's Student Demographics page [p. 56], in the control bar, click **Schedule**.
2 Select the class to exempt.
3 From the **Actions** menu, select **Add Subject Exception**. The Add Subject Exception page appears.
  • To remove a subject exception, select the exception.
4 For **Subject**, select the subject to assign in place of the current subject. The Change Options popup dialog appears.
5 Specify the **Effective Date** of the change and click **OK**.
6 Click **OK**. The Student Schedule page appears on which PowerSchool SMS identifies the exception.

To end a subject exception: [SA][2]

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[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.

1 On the Student Schedule page [], select the class that has the subject exception.

2 For **Changes Effective**, set the date on which any changes should take effect.

3 From the **Actions** menu, select **End Subject Exception...**. PowerSchool SMS displays the student's revised schedule and retains a record of the subject exception.

- Where the subject exception's end date is the same as its start date, PowerSchool SMS removes the subject exception indicator from the class.

Subject exceptions and grading

Typically, a student is graded [p. 84] for the classes that appear on the class roster to which he or she is assigned; for example, a student in Math 4 (Homeroom 4-A) is graded on the Math 4 (Homeroom 4-A) roster.

Where a subject exception is in place, the student is graded on the scheduled subject, not the exception; for example, where a Math 4 student has a subject exception for Math 5, in which the student receives Math 5 level instruction in the Math 4 classroom, the student is still in the Math 4 roster and is graded in that roster according to Math 4 skills and measures.

Thus, where the School Administrator wants a student to be graded strictly according to the instruction received, the administrator must set up that instruction as a separate class and room. For example, to have a student take Advanced Math 5 instead of regular Math 5 and receive that instruction in a different room, the administrator sets up Advanced Math 5 as a subject. Since Advanced Math 5 is a separate subject, that subject's unique skills and measures appear the report card.

Another option for the administrator is to set up a subject with distinct subject elements. All subject elements appear as electives on a student's report card and the teacher is able to record a grading for only the relevant element. For example, Music is a subject taught to all Grade 5 students, but the student takes the Choir subject element and not Band. The teacher in this case records a mark for Choir and records "N/A" for Band. All students in Band and Choir appear on the Music 5 roster.

Scheduling teachers

[Applies to **elementary** [p. 282] and **secondary** [p. 285] school scheduling.]

Once classes are created, the School Administrator can allocate teachers to those classes. These allocations enable PowerSchool SMS's automatic scheduling processes to automatically schedule teacher? After allocating teachers, the administrator can adjust teacher course preferences as well as teacher loads.

For a teacher to be eligible to be allocated to course (that is, teach the course) that course must be specified as a preferred course in the teacher's scheduling preferences [p. 227].

To allocate teachers to classes: [SA][1]

1. In the Planning Calendar, in the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2. (Optional) For **Planning Schedule**, select a planning schedule.
3. Click **Teacher Allocations**. The Teacher Allocations page appears.
4. Under Course Search, click <u>Display All Records</u> (or, search for specific courses). PowerSchool SMS displays the school's courses under **Search Results** [*Figure 159*] [*Figure 160*].
5. Select a course and in the **Actions** menu select **Allocate Teachers**. PowerSchool SMS automatically allocates eligible teachers to the course.
   - To remove an allocation, select a teacher(s) and in the **Actions** menu select **Clear loads for selected teachers** (this takes effect even if the line is locked).
   - The administrator can allocate a teacher to a class by selecting the teacher or course and then entering the number of classes in the **# Cls** column.
   - Prior to having PowerSchool SMS automatically allocate teachers to a course, the administrator can make specific individual allocations and select **Lock** for those teachers or courses to prevent PowerSchool SMS form changing them.
6. Click **Save**.

Figure 159: Teacher Allocations page: by course

A   Course summary: Displays subtotals for scheduling load, classes created, and FTE by course. Click the course name to view the Course Offerings page.

---

[1]You can do this if your role is School Administrator.

B Teachers eligible to be allocated to the course.

C **Total FTE (alloc./sched.) for search results**: The total FTE (full-time equivalent) value of all teachers or courses in the search results. This value includes both allocated and scheduled FTE.

D **Pref**: The teacher's preference for teaching this course, where 1 is the highest and 9 is the lowest. Master Schedule Builder does not schedule teachers with a preference of 9. Use preference 9 to designate teachers as spares for manual scheduling at a later time. **Note**: The administrator can change the teacher preference on this page. Changing the teacher preference here changes it in the staff record and affects all planning schedules, as well as the Active Calendar [p. 172].

E **Sched. Load Factor**: Displays the scheduling load factor that is assigned at the district [p. 310].

F **FTE Alloc (Crs/All)**: Shows the FTE allocation of each teacher for each course. This column has three numbers: one beside each course name and two beside each teacher name. The number beside the course name is the total number of FTEs allocated to this course. The two numbers beside each teacher name apply only to that teacher for that course. The number on the left is the FTE allocated to that teacher. The number on the right is the sum of the FTE for all the courses allocated to that teacher.

FTE allocated = (sum of classes allocated for all terms * course scheduling load) / full-time teacher load where: the "sum of classes allocated for all terms" is the sum of all the #Cls columns.

The "course scheduling load" is in the Sched Load Factor column.

The "full-time teacher load" is the Maximum Scheduling Load defined in staff scheduling properties [p. 227].

The sum of the FTE for all courses is the same whenever this teacher's name appears.

G **FTE Sched (Crs/All)**: The FTE value of all the classes for each course that each teacher is scheduled to teach. This column has three numbers: one beside each course name and two beside each teacher name. The number beside the course name is the total number of FTEs scheduled for that course. The two numbers beside each teacher name apply only to that teacher for that course. The number on the left is the FTE scheduled for that teacher. The number on the right is the sum of the FTE for all the courses scheduled for that teacher.

FTE scheduled = (sum of classes scheduled for all terms * course scheduling load) / full-time teacher load where:

The "sum of classes scheduled for all terms" is the sum of all the #Cls columns.

The "course scheduling load" is in the Sched Load Factor column.

The "full-time teacher load" is the Maximum Scheduling Load defined in "Setting Staff Scheduling Properties" on page 132.

The sum of the FTE for all courses is the same whenever this teacher's name appears.

H **# Cls** (one column for each term and one for the year): The number of classes required and allocated for each course.

The number of columns depend on how many terms you defined. On the By Course tab, the numbers beside each course name heading indicate the number of classes allocated/the number of classes required. The number beside each teacher name indicates the number of classes allocated to that teacher. On the By Teacher tab, the number beside each teacher name heading indicates the total number of classes allocated to that teacher. The number beside each course name indicates the number of classes for that course that are allocated to that teacher.

I   **Lock**: Select to lock the line to prevent any automatic processes from changing the line. The administrator can make a manual change to a locked line.

J   **By Teacher**: Click to view teachers and the courses each is eligible to teach [*Figure 160*].

Figure 160: Teacher Allocations page: by teacher

A   Teacher summary: Displays subtotals for scheduling load, classes created, and FTE by course.
B   Courses to which this teacher is eligible to be allocated.

Teacher placeholder

To take into account a teacher that the school expects to bring in for the next school year, the School Administrator can create a *placeholder* in the Planning Calendar [p. 172]. Using one or more placeholders, the School Administrator can allocate teachers to courses before hiring is not complete. When necessary, such as when a staff member is hired, the School Administrator can convert a placeholder to a teacher. **Note**: In the Active Calendar [p. 172], "Schedule Classes" does not assign a teacher placeholder to classes.

To create a teacher placeholder: [SA][1]

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2 (Optional) For **Planning Schedule**, select a planning schedule [p. 303].
3 Click **Teacher Allocations**. The Teacher Allocations page appears.
4 From the **Actions** menu, select **Create Placeholder Teachers....** The Staff Scheduling Properties page appears.
5 Enter a **Name**.
  - Enter a one-word name. PowerSchool SMS uses this as a last name for search purposes.
6 For **Department**, move one or more departments to the **Selected departments** list.
7 Set **Teaching Load**, **Course Preferences**, **Room Preferences**, and **Time Restrictions** as for any other staff member [>>].
8 Click **OK**.

Scheduling summary

[Applies to **elementary** [p. 282] and **secondary** [p. 285] school scheduling.]

A School Administrator can view a summary of the state of the school's scheduling on the Scheduling page.

To view a summary of a school's scheduling state: [SA][2]

In the **Admin** menu, click **Scheduling**. The Scheduling page appears. PowerSchool SMS displays statistics relevant to each step.
  - To ensure that the statistics are up to date, from the **Actions** menu select **Update Statistics**. **Note**: Updating statistics consumes processing power and PowerSchool SMS generally does it automatically.
  - The "Steps" displayed are only as a guide to initial schedule setup in the Planning Calendar. Once a school's schedule is set up, the administrator can make adjustments in any order.
  - Some steps, such as "7: Set up resource services", appear only in the Active Calendar.
  - Statistics include the following:
    - **Room Setup**: The number of rooms set up.
    - **Staff Setup**: The number of teachers.
    - **Course Setup**: The number of courses assigned to the school.
    - The total number of students used in Course Request Tally and Load Students statistics.
    - **Scheduling Groups**: The number of groups set up.

---

[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.

- **Scheduling Term Sets**: The number of terms sets set up.
- **Day Patterns**: The number of regular days and Special Days in patterns set up [confirm].
- **Bell Schedules**: The number of bell schedules set up.
- **Meeting Patterns**: The number of meeting patterns set up.
- **Class Loading Rules**: The number of class rules defined.
- **Team Loading Rules**: The number of teams [confirm].
- **Course Offerings and Meeting Patterns**: The number of course offerings with meeting patterns configured [confirm].
- **Class Scheduling Options**: The percentage of classes over-allocated [confirm]
- **Course Request Tally**: The number of students with course requests fulfilled versus the number of students [confirm].
- **Teacher Allocations**: The number of teachers allocated versus the number of teachers.
- **Master Schedule**: The number of classes scheduled versus the number of classes.
- **Load Students**: The number of students with full schedules versus the number of students [confirm].

Scheduling constraints for data mapping

[Applies to **elementary** [p. 282] and **secondary** [p. 285] school scheduling.]

On a system that relies on data mapping [p. 168], there are some constraints to be aware of when setting up scheduling.

Bell schedules [p. 364]:

- Each day in a day pattern must have the same bell schedule, including the same periods and the same number of instructional minutes in periods with the same code. For example, if on Monday, period 1 had 50 instructional minutes, period 1 must have 50 instructional minutes for every day in the day pattern. Periods within one day can have different amounts of instructional minutes.
- Each day in the day pattern can have a maximum of 42 periods.
- Periods cannot overlap.
- If more than one scheduling group is defined (for example, to support exception days), the bell schedule must be the same in both scheduling groups, that is, the period codes and period start and end times must be the same.

Scheduling groups [p. 357]:

- All scheduling groups must have the same bell schedule, that is, the period codes and period start and end times must be the same. An administrator can create different meeting patterns based on the bell schedules to accommodate different class types.

Special days [p. 360]:

- Data mapping does not support Special Days. Instead, the administrator must use the same bell pattern for all days in the day pattern. To accommodate different class types, the administrator can create different meeting patterns [p. 367].

Terms [p. 359]:

- The administrator can define a maximum of 12 unique term ranges for each school year. Where the administrator has combined terms to form another term, that term does not count toward the maximum number of allowed terms. For example, if an administrator has three term sets (year, quarters, and semesters) then the total number of terms is seven (1 + 4 + 2). However, since the administrator can combine the quarters to form both the semesters and the year, only the four terms in the quarters are counted toward the maximum number of terms.
- Terms within the same term set cannot overlap.

Class attributes [p. 328]:

- The administrator must create classes [p. 328] for all courses taught at the school (which are based on the district's course catalog [xref]).
- The administrator is able to vary the room and assigned teacher for each time a class meets.

Class teachers [p. 329]:

- The administrator can assign up to three teachers to each class. These teachers map as follows:
  Teacher 1 maps to Main Teacher
  Teacher 2 maps to Team Teacher
  Teacher 3 maps to Teacher Aide

Reservation labels [p. 293]:

- During data mapping, PowerSchool SMS does not copy reservation labels.

System maintenance & setup

System planning, setup, and maintenance tasks are the responsibility of the District Administrator and a team of technical specialists such as business analysts, data architects, developers, and database administrators. Their tasks include:

- Monitoring system tasks [p. 378]
- Maintaining a system's database [p. 380]
- Maintaining a system's Web Server [p. 387]
- Implementation planning [p. 389]
- Assessing system requirements [p. 395]
- Installing a new system [p. 403]
- Upgrading an existing system [p. 417]

Monitoring system tasks

On each server that is part of a PowerSchool SMS system [p. 399], the PowerSchool SMS Task Manager operates in the background to manage a variety of computing tasks, scheduling such tasks, and automatically balancing the load on the Application Servers. This ensures that tasks that demand a lot of computing power, such as a large report or scheduling run, do not slow down routine work. The PowerSchool SMS Task Manager operates as a Windows service.

The administrator can view the tasks run by the Task Manager — or currently running — and get information such as the success, time started, time taken to complete, and the server on which it ran. The administrator can also view the tasks scheduled to be run but not yet started.

To view the status of active and scheduled tasks [DA[1]]:

1   In the **Admin** menu, click **District Setup**.
2   On the District Setup page, under **Tools**, click **Task Management**. The Task Management page appears.
3   On the grid under **Task List**, view a list of tasks. The information displayed includes:
    - **Task name**
    - **Description**: A plain-language description of the process.
    - **Status**: Potential statuses include:
        - Unknown
        - Waiting
        - Not started
        - Completed
        - Running
        - Retrying
        - Failed

---

[1]You can do this if your role is District Administrator.

- Aborted
- Suspended
- **Machine name**: The computer on which the task is running.
- **Machine type**: Indicates the role(s) of this computer within the PowerSchool SMS system. Types [p. 401] include:
  - Directory services
  - Database server
  - Web server
  - Report server
  - Gradebook server
  - Scheduling server
  - Report server light
  - Application server
  - Unassigned
- **Frequency**: Typically, the majority of the tasks handled by the Task Manager are scheduled recurring tasks; for example, "Every day", "Every 24 hours".
- **Next run**: The time at which the task is scheduled to run next. Many of the more processing-intensive tasks are scheduled to run at night when the user load on the system is lower.
- **Last run**: The time at which the task last completed.
- **Duration**: The amount of time taken to complete the task when last run.
- **User name**: The identification of the user that initiated the running of the task. For example, "Admin", "System" (displayed if no other ID is available), "Grayson, Mitch" (full name is provided instead of a User ID).

4 Adjust the display as necessary; for example:
- Select **Include inactive tasks** to have PowerSchool SMS display in the grid (in *gray italic* type) tasks that are scheduled to be run but have not yet started.
- To sort the grid on a column in ascending order, click a column heading; click again to sort the column in descending order.
- To filter the list of results by Task name or Description, enter characters in **Search within results** and press `Enter`.
- To change the number of rows that PowerSchool SMS displays on each page of results, select a number from **Rows**.
- **Total** indicates total number of tasks in this grid (on all pages, if displayed on more than one page).
- **Page # of #** indicates the number of pages of tasks (which varies according to the number of Rows). Click the right arrow to display the next page, the left arrow to display the previous. To specify a particular page, click the current page number, type the page number you want, and press `Enter`.

Note: On a system that employs PowerTeacher Gradebook, we recommend that the administrator update the PowerSchool SMS Task Manager service [p. 378]. Once updated, the administrator should restart the service.

Using PowerSchool SMS Task Manager to troubleshoot

When a problem occurs with PowerSchool SMS's running of a task or process, PowerSchool SMS writes an error to the Task Manager's log file: "Chancery.TaskManager.Service.Log". An administrator can use this log file to help identify the source of the problem.

To locate the Task Manager log file:

1 On the database server, from the Start menu, click **Settings > Control Panel**. The Control Panel appears.
2 Double-click **Administrative Tools**. The Administrative Tools dialog appears.
3 Double-click **Services**. The Services dialog appears.
4 Right-click "PowerSchool SMS Task Manager Service" and select **Properties** from the menu. The Properties dialog appears.
5 Open the folder indicated in **Path to executable.**
6 Open the "Log" folder.
7 Open the file "Chancery.TaskManager.Service.Log file".

Disabling the Task Manager

Since the PowerSchool SMS Task Manager [p. 380], is a Windows service, it starts up automatically on a server when that server starts up. The administrator can stop the service through Windows.

To disable the PowerSchool SMS Task Manager service:

1 On the server, click **Start > Settings > Control Panel > Administrative Tools > Services**. The Services dialog appears.
2 Right-click "PowerSchool SMS Task Manager" and select **Properties**. The PowerSchool SMS Task Manager Properties dialog appears.
3 For **Startup Type**, select "Manual".
4 Click **Stop**.
5 Click **OK**.

Database maintenance

The following maintenance tasks involve using the PowerSchool SMS database installer:

- *Adding a database* [p. 411] [p. 411]
- *Upgrading the PowerSchool SMS database* [p. 421] [p. 423]
- *Repairing a database* [p. 381]
- *Installing Microsoft SQL Server 2008* [p. 381]
- *Creating a Historical Database shell* [p. 381]
- *Changing the database user account information* [p. 383]
- *Adding a school Registration Key* [p. 383]
- *Removing the PowerSchool SMS database installer* [p. 384]

Also, we recommend the following database maintenance tasks:

- *Back up the database* [p. 469]
- *Rebuilding indexes* [p. 386]
- *Updating database statistics* [p. 387]

Repairing a database

To repair a database:

1 On the database server, from the **Start** menu, click **Control Panel > Add or Remove Programs**.
2 In the Add or Remove Programs dialog, select **PowerSchool SMS Database <version>**. Click **Change**.
3 In the Database Identification dialog, click **Repair**.
4 Click **Next**.
5 In the Maintenance Complete dialog, choose **Yes, I want to restart my computer now**. Click **Finish**.

Installing Microsoft SQL Server 2008

Refer to *Installing Microsoft SQL Server 2008 on a Database Server* [p. 407]

PowerSchool SMS 8.0 is compatible with SQL Server 2008 Service Pack 2 (SP2 64-bit or R2 64-bit). If you are using a PowerSchool SMS version that is prior to version 6.7.3, and you want to upgrade to SQL Server 2008 SP2 or R2 at the same time that you upgrade to PowerSchool SMS 8.0, you must first upgrade to PowerSchool SMS 6.7.3, then install SQL Server 2008, before you upgrade to PowerSchool SMS 8.0.

Creating a Historical Database shell

As part of the automated Year-End Processing [p. 450] step, PowerSchool SMS copies the existing active database, which then becomes the Historical Database. Before this can happen, the district must create a shell to contain this database using the PowerSchool SMS database installer.

You do not need to create the Historical Database shell until you are ready to run Year-End Processing [p. 450]. After you run Year-End Processing for the current school year, do not create another Historical Database shell.

To create the Historical Database shell:

1 On the Database Server, from the **Start** menu, click **Settings > Control Panel** > **Add or Remove Programs**.
2 In **Add or Remove Programs** dialog, select **PowerSchool SMS Database <version>**, and then click **Change**.
3 In the Welcome dialog, choose **Database Maintenance**. Click **Next**.
4 In the first Database Identification dialog [*Figure 161*], click **Add Database**.

Figure 161: Database Identification dialog
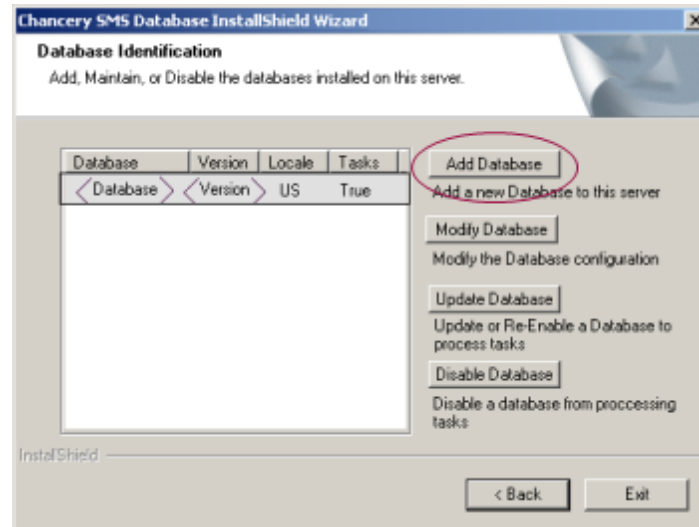
5   In the second Database Identification dialog, choose **Create Historical Database**.

6   For **Active Database Name**, select the active database. Enter the database Username and Password. Click **Next**.

7   In the third Database Identification dialog, enter the SQL administrator password. Enter the database name, user name, and password for the Historical Database. Click **Next**.

8   In the fourth Database Identification dialog [*Figure 162*], in the **Database Structure** section, choose one of the following:
    • To have the installer create the database file groups, select **Simple**.
    • To customize the filegroup layout, select **User Defined.**

Figure 162: Database Identification dialog — database specification
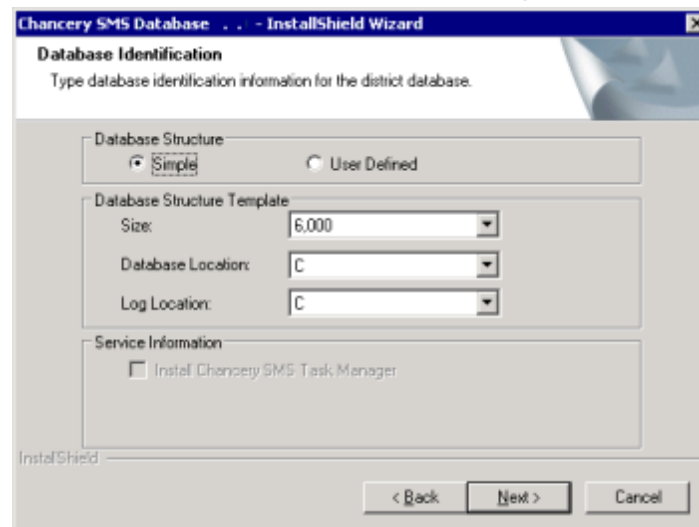
9   In the **Database Structure Template** section, select the appropriate size, database location, and log location.

10 Click **Next**.

11 To complete the creation of the Historical Database, follow the on-screen instructions.
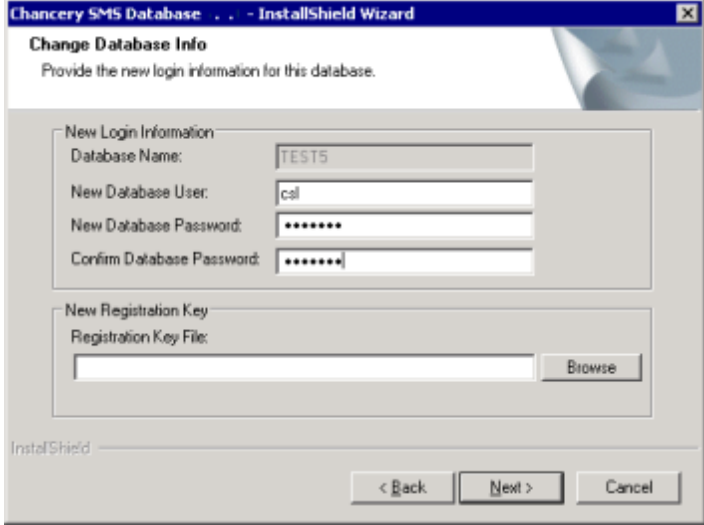
Changing the database user account information

If you change the user name for a user account, the new user name is assigned to the selected database in the Database Name choice list. However, if you enter an existing user name and change the password, the password is changed for all databases associated with that user name, not just the name specified in the Database Name field. Be sure it is your intention to change all users' passwords when you change the password for an existing user name and make sure you notify the users involved that you have changed their passwords.

To change the database user account information:

1   From the **Start** menu, click **Control Panel > Add/Remove Programs**.
2   In the **Add/Remove Programs** dialog, select your Database Server (for example, **PowerSchool SMS** SQL Database <version>). Click **Change**.
3   In the Database Identification dialog, select **Database Maintenance**. Click **Next**.
4   Select a database. Click **Modify Database**.
5   In the Change Database Account Information dialog [*Figure 163*], specify the new database information.
6   To complete the process, follow the on-screen instructions.

Figure 163: Change Database Account Information dialog

Adding a school Registration Key

When you add a new PowerSchool SMS school, you must enter a Registration Key for the new school. If you do not enter the registration key information, you cannot access the school in PowerSchool SMS. Obtain the Registration Key from your Pearson representative for PowerSchool SMS.

To add a Registration Key:

1 Copy the registration key to your Database Server.
2 From the **Start** menu, click **Control Panel > Add/Remove Programs.**
3 In the Add/Remove Programs dialog, select your Database Server (for example, **PowerSchool SMS** Database <version>). Click **Change**.
4 In the Database Identification dialog, select **Database Maintenance**. Click **Next**.
5 Click **Modify Database**.
6 Enter the following:
   - **SQL Administrator Password**
   - **Database Name**
   - **Database Username**
   - **Database Password**
7 Click **Next**.
8 For **New Database User**, enter the existing Username for the database.
9 For **New Database Password**, enter the existing password for the database. Confirm the password.
10 In the **New Registration File** section, click **Browse** and navigate to the location of the **Registration Key**. Click **Next**.
11 To complete the process, follow the on-screen instructions.

Removing the PowerSchool SMS database installer

Caution: Disable the main PowerSchool SMS database before removing the database installer. This preserves an installed databases. If you do not disable the main PowerSchool SMS database beforehand, removing the installer will also remove databases.

To remove the PowerSchool SMS database installer:

1 Disable the PowerSchool SMS database:
   a On the Database Server, from the **Start** menu, click **Control Panel > Add/Remove Programs**.
   b In the Add/Remove Programs dialog, select your Database Server (for example, PowerSchool SMS **Database <version>**). Click **Change**.
   c In the Database Identification dialog, select the database you want to disable. Select **Disable Database**. Click **Next**.
   d In the confirmation prompt, click **OK**. Click **Exit**.
2 From the **Start** menu, click **Control Panel > Add/Remove Programs**.
3 In the Add/Remove Programs dialog, select your Database Server (for example, **PowerSchool SMS Database <version>**). Click **Change**.
4 In the Database Maintenance dialog, click **Uninstall PowerSchool SMS** Installer. Click **Next**.
5 In the confirmation prompt, click **Yes** to remove the generic installation files and scripts.
6 To complete the process, follow the on-screen instructions.

Backing up a system's database

You can back up a system's database when necessary or set up a regularly scheduled time for PowerSchool SMS to do it automatically. The backup process results in a static copy of the database in a location of your choosing. Allow up to an hour for the backup process. Once a backup is underway, you can check on its progress or set up automatic notification of its success or failure.

Circumstances in which we recommend backing up a system's database include:

- Before a PowerSchool SMS software upgrade
- Before mapping data [p. 168]

To back up a system's data: [DA[1]]

1 In the **Start** menu click **Programs > Microsoft SQL Server > Enterprise Manager**.
2 In the left pane, locate the name of the system's database server.
3 Open **Management**, then **SQL Server Agent**, then **Jobs**.
4 In the right pane, right-click "`[Your Database's Name]` backup" and in the menu click **Start Job**. Enterprise Manager starts backing up your data.
   - To schedule a backup rather than run it immediately, click **Schedules**, then **New Schedules**.
   - To set the location of the backup, in the right pane, right-click "`[Your Database's Name]` Backup" and in the menu click **Properties**. Click **Steps**, then **Edit....** In the Edit Job Step dialog, specify a location [*Figure 164*].

Figure 164: Edit Job Step dialog
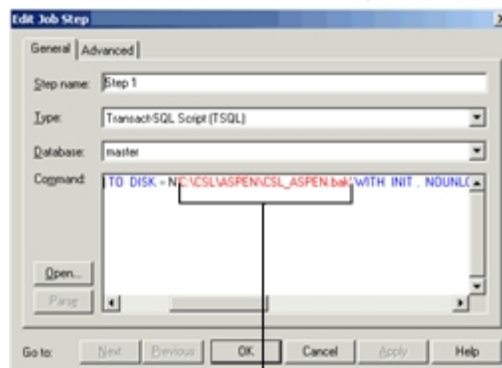
Edit this string to change the location of your backup.

To check on the progress of the backup process: [DA[2]]

1 In the **Start** menu click **Programs > Microsoft SQL Server >**

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[1]You can do this if your role is District Administrator.
[2]You can do this if your role is District Administrator.

Enterprise Manager.

2 In the left pane, locate the name of the system's database server.
3 Open **Management**, then **SQL Server Agent**.
4 Right-click **Jobs** and in the menu click **Refresh**.
5 In the **Status** column, view the status of the backup process.
   - For a scheduled backup, you can also view the time of the last backup and the scheduled time for the next.

To set up an automatic notification of a backup success or failure:

1 Set up an operator to receive the notification:
   a In the **Start** menu click **Programs > Microsoft SQL Server > Enterprise Manager**.
   b In the left pane, locate the name of the system's database server.
   c Open **Management**, then **SQL Server Agent**.
   d Right-click **Operators** and in the menu click **New Operator**.
   e For **Name**, specify an operator or computer name.
   f In the **Net Send Address**, specify the name of the computer to which you want notifications sent.
   g Click **Test** to send a test message.
   h When Enterprise Manager displays a message, click **OK**.
   i Click **OK**.
2 Set up a notification:
   a In the **Start** menu click **Programs > Microsoft SQL Server > Enterprise Manager**.
   b In the left pane, locate the name of the system's database server.
   c Open **Management**, then **SQL Server Agent**.
   d In the right pane, right-click "`[Your Database's Name]` backup" and in the menu click **Properties**.
   e Click **Notification**.
   f Select the **Net Send Operator** check box and choose one of the operator's you set up in step 1.
   g Choose the condition that triggers a notification. Your choices include:
      - When the job succeeds
      - When the job fails
      - Whenever the job completes
   h Click **OK**.

Rebuilding indexes

A SQL database, such as the one on which a PowerSchool SMS system relies, requires the regular rebuilding of its indexes to ensure reliable and efficient performance. We recommend that the database administrator do this at least once a week, ideally at an off-peak time such as Sunday morning.

Updating database statistics

Accurate and up-to-date statistics are important to the efficient performance of SQL Server. We recommend that the database administrator update statistics for the PowerSchool SMS system's database at least once a month. When updating statistics, it is also useful to recompile the stored procedures. The database administrator can use a script in Query Analyzer for these tasks.

To update statistics and recompile stored procedures: [DA[1]]

1 In Windows, from the **Start** menu, select **All Programs > Microsoft SQL Server > Query Analyzer.**
2 Connect to the database.
3 Enter the following script: `DECLARE @table_name varchar (1000),@sql nvarchar(4000) declare c1 cursor for SELECT name FROM sysobjects WHERE xtype = 'U' open c1 fetch next from c1 into @table_name while @@Fetch_Status = 0 begin Select @sql = 'UPDATE STATISTICS ['+ @table_name +'] WITH FULLSCAN' exec sp_executesql @sql fetch next from c1 into @table_name end close c1 deallocate c1 GOdeclare @cmd nvarchar(500) declare cur_sp cursor fast_forward read_only local for select 'exec sp_recompile ['+object_name(o.id)+']' from sysobjects owhere o.xtype = 'U' open cur_sp fetch next from cur_sp into @cmdwhile @@Fetch_Status = 0 begin exec sp_executesql @cmd fetch next from cur_sp into @cmdendclose cur_spdeallocate cur_sp go`
4 Execute the query.

Web Server maintenance

Web Server maintenance tasks include:

- *Configuring Web Server credentials* [p. 387]
- *Configuring Web Server tasks* [p. 388]
- *Synchronizing the COM+ object password* [p. 388]

Configuring Web Server credentials

When you installed the PowerSchool SMS Web Server [p. 413], you chose which database the Web Server connected to. You can change PowerSchool SMSWeb Server credentials using the following procedure.

To change PowerSchool SMS Web Server credentials:

1 On the web server, from the **Start** menu, click **Control Panel >**

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[1]You can do this if your role is District Administrator.

Add/Remove Programs.

2   In the Add/Remove Programs dialog, select **PowerSchool SMS** <version> Web Server. Click **Change**.

3   In the Web Configuration dialog, select **Configure Web Server Credentials**. Click **Next**.

4   In the Database dialog, select the Database Server. Enter the system administrator user name and password. Click **Scan Databases**.

5   Select the database. Click **Next**.

6   In the Maintenance Complete dialog, click **Finish**.

Configuring Web Server tasks

When an administrator installs PowerSchool SMS Web Server [p. 413], the administrator chooses server tasks and sets the number of processes handled by each server to control the flow of user traffic. The administrator can change these tasks.

To configure Web Server tasks:

1   On the web server, from the **Start** menu, click **Control Panel > Add/Remove Programs**.

2   In the Add/Remove Programs dialog, select **PowerSchool SMS** <version> Web Server. Click **Change**.

3   In the Web Configuration dialog, select **Configure Web Server Tasks**. Click **Next**.
    •   For information about configuring server options, see *Server role maximum process values* [p. 402].

4   When you are finished configuring server options, click **Next**.

5   In the Maintenance Complete dialog, click **Finish**.

Synchronizing the COM+ object password

If the administrator changes the administrator account password on a Web or Application Server, the administrator must ensure that the password for the COM+ object [p. 388] specific to the PowerSchool SMS system matches the new password. If these passwords do not match, PowerSchool SMS will generate a permissions error when a user attempts to view any ASP popup page, such as the Setup Lists and General Preferences pages.

To change the COM+ object password on a server:

1   On the Web or Application Server, click **Start > Settings > Control Panel > Administrative Tools > Component Services**. The Component Services dialog appears.

2   Under **Tree**, expand tree view to view "Component Services > Computers > My Computer > COM+ Applications > Chancery".

3   Right-click "Chancery" and select **Properties**. The Chancery Properties dialog appears.

4   Click **Identity**.

5   Under Account, ensure that **This user** is selected and that **User** is accurate.

6 Enter a **Password** that matches that of the administrator account on the server.

7 Confirm the password and click **OK**.

8 Restart the server.

General maintenance practices

- *Managing demanding system activities* [p. 389]
- *Using PowerSchool SMS Task Manager to troubleshoot* [p. 380]

Managing demanding system activities

Some activities demand enough of a PowerSchool SMS system's processing capacity to slow its performance for all users. To ensure good system performance, we recommend that the District Administrator encourage and train system users to conduct such activities at periods of low system usage, such as outside school hours. Also, the District Administrator can use permissions [p. 247] to control the access of specific users to demanding system activities.

Demanding activities include:

- Printing report cards in bulk, such as for an entire grade or school.
- Running a large report without careful use of filters to narrow the selection criteria [p. 123], such as a district-wide report. **Note**: We recommend that user training include the use of report filters to narrow a report's selection criteria and thus the demands it makes on a system.
- Running several instances of the same report.
- Synchronizing PowerTeacher gradebook at the start of the school year.
- Calculations such as daily attendance [p. 159], GPA calculations [p. 453], and class ranks [p. 454].
- Year-end processing [p. 450]
- Database maintenance tasks [p. 380] such as re-indexing

The administrator or user can schedule PowerSchool SMS to perform demanding activities at off-peak times, such as in the evening, overnight, or on weekends. Demanding activities that can be scheduled include:

- Database backup [p. 380]
- Running reports [p. 117]. High-demand reports include report cards.
- Importing data
- Exporting data
- Daily attendance calculations [p. 159]

Implementation planning

Planning the implementation of a PowerSchool SMS system in a school district is a complex process involving a team of people. Our recommended planning process involves the following:

- *Assigning project positions* [p. 390]

- *Assessing infrastructure needs* [p. 392]
- *Preparing system users* [p. 394]

Implementation involves the following steps:

1 Install a PowerSchool SMS system in the district [see *Installing a new system*, p. 403]
2 Define the calendar see *District calendar setup* [p. 252].
   - **Note**: On a newly installed PowerSchool SMS system, a District Administrator must set up the default active calendar in order to use that system.
3 Identify the district and schools.
   - Set up district profile and general preferences.
   - Create school profiles.
4 Standardize district-wide data.
   - Populate setup lists.
   - Define district-wide grade levels.
   - Define district-level course catalog.
5 Set up user accounts.
   - Set up log on accounts
   - Set up staff records
   - Set up user roles.
6 Customize PowerSchool SMS
   - Create custom pages and modify existing student pages.
   - Create custom district and school reports.
7 Standardize school setup.
   - Complete School Setup tasks for "source" school, that is, the school from which the setup will be copied to other schools.
   - Copy the school setup to other schools and configure these "target" schools.
   - Advise school administrators that school setup is complete.
   - Use Assign Values and Assign Multi-Values to populate EIS fields (Tennessee districts only).
8 Import student data.
   - Standardize student data in existing system.
   - Import student data into PowerSchool SMS.

Assigning project positions

A typical implementation is a significant project that involves a number of specialists, such as implementation consultants, information technology managers, software developers, and key user representatives such as guidance counsellors.

This section describes the postions (and groups) that we recommend assigning for an implementation project in a large district. The actual positions adopted by a school district will depend on the size and nature of that district—in a smaller district, one person might hold several positions, whereas in a larger district, some people may be dedicated entirely to the implementation while others might devote only a portion of their time. These recommended positions are:

- **District Executive**: A senior executive in the school district who provides funding, reports to the school board, and resolves critical project issues.
- **District Executive Sponsor**: A senior executive at the school district who takes responsibility for the implementation project. Typically this person leads a steering committee and takes whatever action is necessary for the implementation to succeed.
- **District Project Steering Committee**: An executive-level group that makes decisions on how the PowerSchool SMS system is to be implemented and how the project is conducted. This includes approving changes in project scope, budget, schedule, or approach. The committee also helps resolve major issues that the project team cannot.
- **District Project Executive**: A senior manager with a specialized knowledge of student information systems who oversees the project. Responsibilities include coordinating inter-departmental activities, performing periodic quality management reviews, and resolve any issues that the District Project Manager cannot.
- **District Project Manager**: On a large-scale project, the manager who monitors daily work with an eye to schedule, budget, and quality. This involves coordinating staff and resources, managing risks and issues, coordinating the activities of district office and school-site personnel, monitoring and managing the district's side of the implementation contract, and reporting on project progress.
- **District Process Team Lead**: A manager who is responsible for a team engaged in Business Process Re-engineering (BPR), documenting current business processes, and determining how those might be improved. This person also personally performs some of the team's tasks.
- **Business Analyst**: An analyst who understands the school district organization. This person analyzes and redesigns business processes, determine requirements for and tests data extensions, runs trial data conversions, designs and tests reports, and helps train users. Works with the Technical Writer.
- **Technical Writer**: A skilled writer who documents current and redesigned business processes. Works with the Business Analyst.
- **District Training Team Lead**: A manager who is responsible for a team that trains system users. This person plans and supervises the training team's work and personally performs some of the tasks.
- **Trainer**: A person who trains district personnel to use the PowerSchool SMS system.
- **Instructional Designer**: A person who develop procedures and training materials for system users.
- **District Software Team Lead**: A manager who is responsible for a team that develops reports in PowerSchool SMS and analyzes legacy reports. This person also personally performs some of the tasks.
- **Developer**: A software developer who creates create data extensions (using Customization Builder) and interfaces between the district's PowerSchool SMS system and other systems.

- **Report Developer**: A software developer who creates reports and data extracts and customizes standard PowerSchool SMS reports.
- **Help Desk Support**: This person helps district personnel use the system.
- **District Data Team Lead**: A manager who is responsible for a team that designs and monitors the school district's collection and use of data.
- **Data Architect**: A person who designs and monitors the school district's collection and use of data and ensures its availability to system users.
- **Data Specialist**: A person who plans and runs conversions of the school district's data to and from the PowerSchool SMS system and verifies the results.
- **District Infrastructure Team Lead**: A manager who is responsible for a team that sets up and maintains the network and system infrastructure necessary to support the PowerSchool SMS system.
- **Database Administrator**: A specialist with SQL Server database management skills who manages the PowerSchool SMS system's database. Tasks include backup, recovery, security, and performance improvement. This person also specifies database requirements, tests interfaces, and supports Developers and Technical Analysts.
- **Technical Analyst**: A specialist who sets up and supports the school district's PowerSchool SMS system. This might involve setting up and supporting Active Directory and Zone Integration Server, training District Administrators (in duties such as security, backup, and software upgrade), troubleshooting installation and configuration, developing reports and data extracts, developing interfaces with other systems, defining a disaster recovery plan, and working with Developers.
- **District Communications Team Lead**: A manager who is responsible for a team that keeps school district stakeholders informed about the implementation project.
- **Communications Specialist**: A specialist who helps keep school district personnel informed. This involves writing content and publishing to the project web site.
- **Project Support and Administration Person**: A person who provides logistical support to the project. Tasks might include processing invoices, booking meeting rooms, scheduling training, and publishing reports.

Assessing infrastructure needs

When assessing a school district's computing hardware infrastructure needs in preparation for the installation of a PowerSchool SMS system, we recommend that, in addition to the core system requirements [p. 395], the implementation team consider:

- The district's future growth. As a district grows or extends its PowerSchool SMS system to more schools or personnel, additional servers and supporting infrastructure might be needed.
- Network performance. We recommend conducting a detailed network analysis [p. 393].
- Workstation performance [p. 393]

Network analysis

Conducting a detailed network analysis in advance of implementation is an essential ingredient to achieving good performance of the PowerSchool SMS system for users. Comparing this analysis to Quality of Service (QoS) guidelines can help generate infrastructure requirements.

We recommend that the analysis take into consideration the following:

- Network connections between the school district office and individual schools
- Flat network design at each school
- The use of modern network switches rather than hubs
- Careful use of wireless technology at schools
- Segregated administrative networks with bandwidth allocated to the PowerSchool SMS system.

Workstation performance

The performance of the PowerSchool SMS system, a web-based application, at each user's workstation is critical to the success of an implementation. Apart from network performance, workstation performance can depend on such factors as processor speed, memory, and hard drive space. Refer to *User access requirements* [p. 398]. Advances in the Microsoft operating system and browser technologies typically increase demands on workstations and reduce overall performance.

To ensure optimum workstation performance, we recommend the following practices:

- Set minimum hardware standards [p. 395].
- Standardize on one operating system where possible [p. 398]. In addition to guaranteeing performance, this facilitates the troubleshooting of user issues.
- Apply appropriate security measures. Such measures should include strict standards and procedures to protect against viruses and spy ware.
- Specify appropriate screen sizes and resolutions [see p.398]. For a School Administrator or Secretary, we recommend a resolution greater than 640x480.
- Optimize the web browser for performance and security [p. 31].
- Configure web browser's cache size. We recommend 100-150 MB. Clear the cache after the installation of a major PowerSchool SMS upgrade.

- Ensure that a web browser bookmark (also known as a "favorite") is used for access to the PowerSchool SMS system rather than a desktop shortcut.
- Specify the school district's default web browser "Internet Properties > Advanced" settings and ensure that they are applied.
- Ensure that the appropriate version of Adobe Acrobat [p. 398] is installed and operating correctly. Improper installation is a common source of problems.

Preparing system users

A good implementation plan includes preparing the users of the PowerSchool SMS system to work with it effectively. This involves more than software training; it includes highlighting access to documentation [p. 1], support site (s) [p. 1], setting user expectations, describing new processes inherent in the system, and identifying the existing process that will change with its implementation.

The training of system users, typically the responsibility of trainers, instructional designers, and technical writers [p. 390], has a direct impact on system performance and response time. Prominent examples of this include searching effectively [p. 42] so as to generate relevant results, and using grid print [p. 27] rather than browser page printing. Training also increases system acceptance, reduces user errors, and reduces the cost of user support.

As a web-based application, a PowerSchool SMS system might constitute an unfamiliar and perhaps slower user experience, especially where the school district's former systems were microcomputer or mainframe applications. Typically, such systems are fully customized for the user base, rely on character-based interfaces, and respond very quickly to user input.

The implementation of new information system such as that of PowerSchool SMS inevitably involves the adoption of new processes on the part of users. Trainers should explicitly describe these processes and their underlying assumptions to the users. Moreover, a school district will likely have to adjust existing processes to accommodate the system. For example, the introduction of stored daily attendance values eliminated the need for reports to calculate daily attendance (which improved the performance of these reports) see *Attendance Reports* [p. 534]. To take advantage of this, the District Administrator needed to modify existing custom reports to use the stored values rather than calculating those values. In addition, users had to be sure to run daily attendance calculations prior to running the reports.

School Administrators deserve particular attention in a training plan. In a typical district, School Administrators constitute the majority of users. School Administrators benefit from training in the following areas:

- System timeout [p. 11] and the importance of saving work
- Entering and maintaining student demographic information [p. 55]
- Enrolling students [p. 141]
- Taking attendance [p. 76]
- Recording grades [p. 84]

A training plan should also take into account newly hired district staff, the introduction of a major upgrade to the PowerSchool SMS software, and timely refresher training on tasks that occur at specific times of the year, such as scheduling a new school year [Refer to *Scheduling* [>>]]or year-end [p. 434].

System requirements

This section describes the hardware and software requirements of a typical PowerSchool SMS 8.0 system see *System components* [p. 395]. The section also describes the requirements for a *Multi-server configuration* [p. 399].

Since each system is unique in its scope and usage, the requirements of most systems exceed the minimum. In general, the number of students determines the amount of storage needed while the number of users determines the number and type of servers and network bandwidth.

System components

A PowerSchool SMS system consists of a Web Server, an Application Server, a Database Server, a Report Server, personal computers for user access, and the network bandwidth needed to connect all of these. Depending on the scope and demands of the implementation, the servers may be on one computer or spread over several. A system may also require more than one instance of each type of server [p. 399].

 [*Table 63*, p.395] provides a summary of system requirements. Since a PowerSchool SMS system can operate with other products, such as PowerTeacher gradebook (web-based grading) and ParentCONNECTxp (web-based view of student information for parents) [p. 167], [*Table 63*, p.395] also shows the system requirements for those products.

Table 63: **Products system requirements summary**

Product	Web [p. 396] /Application Server [p. 396]	Database Server [p. 397]	MS SQL Server [p. 408]
PowerSchool SMS 8.0	Windows Server 2008 R2 64-bit	Windows Server 2008 R2 64-bit	MS SQL 2008 R2 64-bit
	or Windows Server 2008 R1 32-bit	or Windows 2008 Server R1 - 32-bit	MS SQL 2008 R2 32-bit
	or Windows Server 2008 R1 64-bit	or Windows 2008 Server R1 - 64-bit	MS SQL 2005 R2 64-bit
PowerTeacher 2.2.3	Windows Server 2008 R2 64-bit	Windows Server 2008 R2 64-bit	MS SQL 2008 R2 64-bit
	Windows Server 2008 R2 32-bit	Windows Server 2008 R1 32-bit	MS SQL 2008 R2 32-bit
ParentCONNECTxp 4.1 [p. 167]	Windows Server 2008 R2 32-bit	Windows Server 2008 R2 64-bit	MS SQL 2008 R2 64-bit

Product	Web [p. 396] /Application Server [p. 396]	Database Server [p. 397]	MS SQL Server [p. 408]
		Windows Server 2008 R1 32-bit	MS SQL 2008 R2 32-bit
			MS SQL 2005 R2 32-bit

Note: A system running PowerSchool SMS 8.0 must upgrade to PowerTeacher 2.2.3 prior to running the first stage 1 PowerSchool SMS export and stage 2 PowerTeacher import.

Web Server requirements

The Web Server delivers web pages and data to connected users. Each Web Server can support up to 450 concurrent users of a PowerSchool SMS system. Typically, the number of concurrent users on a system is 60% of the number of potential users. Where two to five Web Servers are employed, we recommend balancing the load between the servers using a software or hardware load balancing solution. For six or more Web Servers, we recommend employing a dedicated hardware load balancer on either a router or a switch [*Figure 166*].

We recommend that each Web Server have the following characteristics:

- Dual Intel Xeon 3.2GHz HTT processors with 1MB Cache or better
  Or dual AMD Opteron processors, Model 852 or better
  Note: Using several dual processor Web Servers is more efficient than using fewer servers with more processors.
- 4 GB RAM
- Dual 36 GB drives
  We recommend that the drives be configured as RAID1 to provide redundancy in case of failure.
- Two network interface cards (NICs)
- Microsoft®Windows® Server 2008 R2 SP1 64-bit
  or Windows Server 2008® R1 SP1 64-bit or 32-bit
- PowerSchool SMSWeb Components
- Microsoft .NET Framework® 3.5 SP1, 4.0

Application Server requirements

An Application Server reduces the load on the Web Server(s) by handling select aspects of PowerSchool SMS; for example a district can have one or more Application Servers that run scheduling services, reporting services, active directory integration, or printing. Many of these services are background tasks that are best run on Application Servers.

We recommend that each Application Server have the following characteristics:

- Dual Intel Xeon 3.2GHz HTT processors with 1MB Cache or better
  Or dual AMD Opteron processors, Model 852 or better
- 4 GB RAM

- Dual 36 GB drives

  We recommend that the drives be configured as RAID1 to provide redundancy in case of failure.
- Two network interface cards
- Microsoft Windows Server 2008 R2 SP1 64-bit
  or Windows Server 2008 R1 SP1 64-bit or 32-bit
- PowerSchool SMS Web Components
- Microsoft .NET Framework 3.5 SP1, 4.0

Database Server requirements

Database Server requirements are determined by the number of students the PowerSchool SMS system is expected to handle. The main type, a Transactional Database Server, may be supplemented by a Reporting Database Server. The Reporting Database Server is optional and requires a more senior DBA on site. It is possible to run the reports from the Transactional Database Server if the hardware is powerful enough.

Storage space requirements are determined by the size of the database plus the PowerSchool SMS application software as well as other factors such as the recovery model and the log file management process. Where fail-over clustering or log shipping is in use, we recommend at least two Transactional Database Servers [*Figure 166*].

Database Server

We recommend that each Database Server have the following characteristics:

- Microsoft Windows Server 2008 R1 64-bit, x64
- Microsoft Windows Server 2008 R2 64-bit
- Microsoft SQL Server® 2005 R2 SP1 64-bit or 32-bit
- Microsoft SQL Server® 2008 R1 SP1 64-bit
- To use fail-over clustering or log shipping, Microsoft Windows Server 2008 R1
- The latest generation of Intel or AMD x64 multi-core processors
- Microsoft .NET Framework 3.5 SP1, 4.0
- Disk subsystems RAID 1, RAID 10 or RAID 0+1
- Hyper-threading disabled
- At least 1 terabyte of storage (additional storage may be required for backups and tertiary environments)
- Network interface cards (NICs) and RAID controllers appropriate to the system
- PowerSchool SMS components and other third-party components as required

For 30,000 to 50,000 students:

- 4 cores or better microprocessor system
- 8 GB RAM minimum

For 50,000 to 75,000 students:

- 8 cores or better microprocessor system on minimum two physical processors
- 16 GB RAM minimum

For 75,000 to 100,000 students:

- 16 cores or better microprocessor system on minimum two physical processors
- 32 GB RAM minimum

Reporting Database Server

A dedicated Reporting Database Server has similar requirements to the Transactional Database Servers with the following differences:

- Half the number of processors, to a minimum of two.
- Half the memory
- No fail over is necessary

User access requirements

A typical PowerSchool SMS system is based on one or more servers running in a central location [*Figure 166*]. Users connect to the system using a web browser on a personal computer, which connects through a local network, a wide-area network, or the Internet [*Figure 165*]. The user's personal computer can be Windows-based or Macintosh®. Each has its own requirements [*Table 64*, p.398].

Figure 165: Access to a PowerSchool SMS system
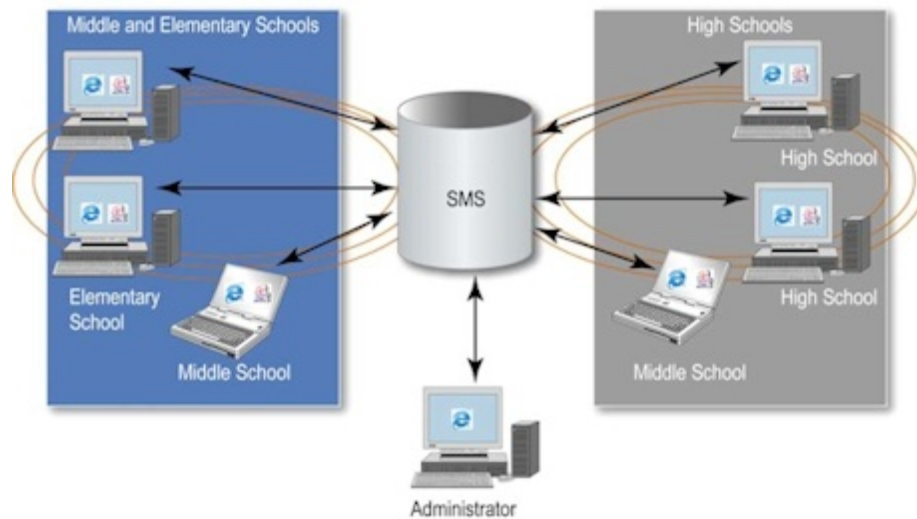
Table 64: Personal computer requirements

Feature	Windows-based	Macintosh
Operating system	Windows® 7 Windows Vista® with Service Pack 2 Windows XP® with Service Pack 3	Mac OS® X 10.6 Mac OS® X 10.7

Feature	Windows-based	Macintosh
Processor	Intel® Pentium® 4, 1.5GHz or better	Whichever supports OS X 10.6 or 10.7
Memory	512 MB of RAM	256 MB RAM
Web browser	Microsoft Internet Explorer® 9 or 8 for Windows. Firefox 10 and 11 **Note**: 8.0 supports the use of 64-bit web machines. **Note**: With Internet Explorer 9 or 8, ensure that Compatibility Mode is Off.	Safari® 5
Monitor	Display resolution of 800 x 600 • We recommend 1024 x 768 or higher. • We recommend a wide-screen LCD monitor.	
Storage	3 GB	3 GB
Other	Adobe® Reader® 9, 10.1	Adobe® Reader® 9, 10.1

Network bandwidth requirements

We recommend a 1 gigabit switch, and that at least 1 MB of network bandwidth be allocated for PowerSchool SMS. This bandwidth can re-utilize existing network connectivity options, but should be in addition to the amount of traffic already in place on the connection. For example, if a 10 MB fiber connection is already in place and only bursting to 4 MB during peak usage, there should be no further bandwidth required. However, if a 10 MB connection is in use and is completely saturated, additional bandwidth should be allocated.

Actual available bandwidth is important to consider, that is, how the connection's capacity is used; for example, in a school district where all traffic, including email and all Internet activity, is routed from each school back to the district office, only some of the connection's bandwidth is available to the PowerSchool SMS system. Moreover, the available bandwidth may vary according to activity; for example, teachers in one school taking class attendance simultaneously consumes more bandwidth than at a school that uses multiple bell schedules.

Multi-server configuration

For a system subject to large data or traffic demands, running several instances of each type of server [p. 401] facilitates the balancing of traffic loads, increases data security, and boosts fault tolerance (and thus overall system availability). A multi-server configuration also facilitates the separate processing of PowerSchool SMS's several distinct *tiers* of logic such as those for presentation, reporting, transactions, meta data, and the database [*Figure 166*]. Finally, dedicating each server to only selected roles improves performance [p. 401].

Determining the appropriate number of servers needed for a system involves taking the following into consideration:

- The number of students: Affects the amount of storage space needed.
- The number of teachers: Affects the number of Web Servers needed to support concurrent users.
- PowerSchool SMS modules in use: Affects how application load processes need to be spread across servers.
- The growth of the district: We recommend hardware that will perform well for at least four years.
- Ratio of Web Servers to Application Servers: We recommend a ratio of four to two. For a highly available system, we recommend at least two Application Servers.

Figure 166: A multi-server configuration
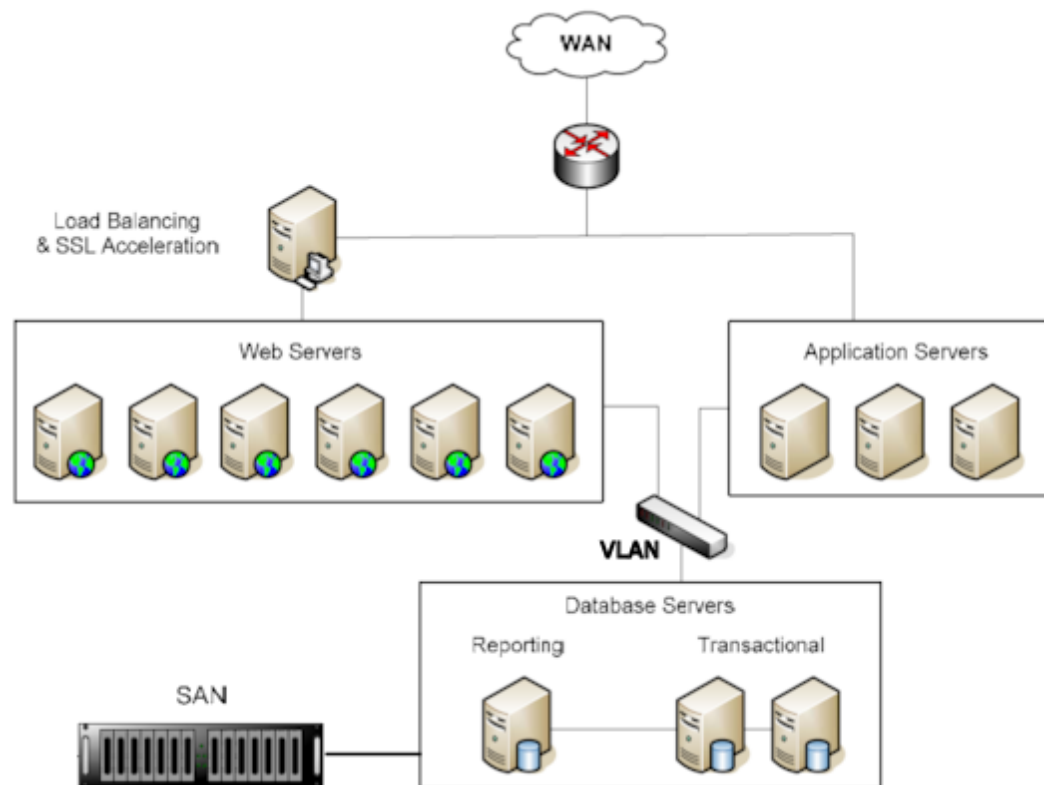
Load Balancing: This application balances traffic loads between the Web Servers. Windows Server 2008 supports Network Load Balancing. However, on larger-scale implementations, we recommend moving this extra computational load to a separate dedicated device.

SSL Acceleration: Performs hardware acceleration for the secure connections (SSL). SSL connections offer better security for student data. Windows Server 2008 supports SSL acceleration. However, on larger-scale implementations, we recommend moving this extra computational load to a dedicated device.

VLAN: A Virtual Local Area Network connects the Web and Application Servers to the Database Servers. PowerSchool SMS employs a multi-level security system based on standard .NET and SQL Server security.

Database Servers: The Reporting Database Server uses Microsoft SQL Server Transactional Replication to maintain its consistency with the Transactional Database Servers.

SAN: The database resides on a Storage Area Network (SAN) or other high availability storage device. This storage device is necessary for a high-availability multi-server environment.

Server roles

When setting up a PowerSchool SMS Web Server [>>], the administrator can choose one or more roles for the server. The roles are:

- **Application Server**: The server handles all PowerSchool SMS application processes not specific to scheduling, reporting, or Directory Services [*Figure 166*].
- **Directory Services Server**: The server handles processes specific to Active Directory integration, such as mapping users and roles. Choose this for a server on which Directory Integrator is installed. For more information, refer to the *Directory Integrator Guide*.
- **Legacy Reporting Server**: Enables the server (if it is assigned the Report Server role) to run legacy (pre version 4.2 reports) reports; requires a Dedicated Report Server Name, which is, by default, the current server.
- **Maintenance and Communication Server**: The server runs the Database Task Manager. Caution: Assign this role to one server only. Otherwise, the Database Task Manager might run on a different server each time.
- **Report Server (Processor Intensive)**: The server processes requests for PowerSchool SMSreports, including custom reports and large reports that require a lot of processing power see *Report server performance* [p. 402]. Note: Select both Report Server roles (Processor Intensive and otherwise) for a server to ensure that all reports are processed by the same server.
- **Report Server**: The server processes Report Package reports that are generally smaller and require little processing power.
- **Scheduling Server**: The server processes scheduling tasks, such as loading students. Note: Do not set each server to handle more than two processes.
- **Web Server**: The server handles all web page requests [*Figure 166*]. By default, this role is selected. Consider disabling the PowerSchool SMS Task Manager on a dedicated Web Server [p. 380].

By default, every server is a Web Server. If the system employs only one server, this server must handle all server roles [p. 401]. For a system that employs more than one server see *Multi-server configuration* [p. 399], the administrator may be able to improve system performance by dedicating each server to handle only selected roles. This limits the load on each

server. The administrator can also limit a server's load by setting the maximum process value for a role [p. 402].

To accommodate changing demands, the administrator can change a server's role(s) during the school year. For example, at the beginning of the school year, the administrator might designate additional servers as scheduling servers to handle the increased number of incoming course requests.

Server role maximum process values

Each server role has an associated maximum process value [*Figure 167*]. By setting this value [p. 402], the administrator can have the PowerSchool SMS Task Manager [p. 378] service control that role's load on the server's processing capabilities. For example, if you have a maximum processes value of 10 for **Scheduling Server**, when the 11th instance of the scheduling server application tries to start, PowerSchool SMS Task Manager prevents it until another scheduling process concludes.

Figure 167: Server Configuration Options dialog: maximum processes value
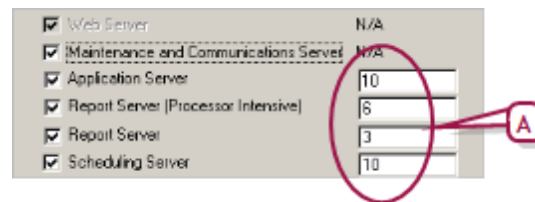
A   Maximum process values

Report server performance

For a large system, having one or more dedicated report servers can greatly improve system performance. This is because reports, especially large ones, can make heavy demands on a system's processing power [see also *Managing demanding system activities* p.389]. When a system is overtaxed, PowerSchool SMS might not complete a report or might fail to display the results before it times out. Also, the system may operate slowly for other users. To avoid performance problems, especially on a large system, we recommend the following:

- Have one or more dedicated report servers.
- Limit the number of reports that can be processed at one time by a single report server by setting the server's **Maximum Processes** to three [p. 402]. Limiting the number enables PowerSchool SMS to process the reports faster and speeds the rate a which reports move through the queue. **Note**: Three is the default number of Crystal Reports licenses included with a PowerSchool SMS system; these need not all be allocated to one server. To obtain additional licenses, contact Pearson. **Note**: PowerSchool SMS 8.0 is compatible with Crystal Reports 2008 SP3 (Crystal 12) or better.

Server affinity

To determine which server should process a task, the PowerSchool SMS Task Manager [p. 378] refers to each server's *server affinity*. A server's affinity is the sum of its Windows Task Manager machine type values. (Windows Task Manager is a service that manages how servers process scheduled tasks.) This value is based on the server's roles and options.

The following are the machine type values associated with each server role:

- Application Server: 512
- Directory Service: 4
- Database Server: 8
- Gradebook Server: 64
- Report Server Heavy: 32
- Report Server Light: 256
- Scheduling Server: 128
- Web Server: 16

For example:

- Application Server 1 is a Database Server, Application Server, and Scheduling Server. Its server affinity is 648.
- Report Server 2 has the role of Report Server Light and Report Server Heavy. Its server affinity is 288.

To change a server's affinity:

1 On the server, open the folder "C:\inetpub\wwwroot\PowerSchoolSMS".
  - The administrator can make this change while the server is running.
2 Using Notepad, open the file "Chancery.SMS.TaskManager.Service.exe.config".
3 In the "Task Manager" section, set the affinity (the sum of the machine type values of the server's roles).
  - For example,"`<add key = "TaskManager.MachineType" value = "648">`"
4 Save the file.
5 Restart the Chancery Task Manager Service.

Disabling PowerSchool SMS Task Manager

To save memory and processing power on a server that is assigned only the Web Server role, we recommend that the administrator disable the PowerSchool SMS Task Manager service [p. 380]. Also, if possible, assign the Database Server role to Application Servers and disable the PowerSchool SMS Task Manager service on any dedicated Database Server.

Installing a new system

This section describes how to install the software for a PowerSchool SMS system on one or more servers. Each installation task is described separately, although the task might apply to more than one type of system. The

particular installation tasks that apply to a system depend on the nature of that system, the main types of which are:

- Single-server system: Involves installing PowerSchool SMS and a Database Server on one server box. This is the minimum system setup suitable for a school or small district.
- Hosted system: This involves installing more than one district database on a single Database Server. This saves costs because you don't need to buy a server and a Microsoft®SQL Server® license for each database. For further information, contact Customer Service at 1-800-999-9931.
- Multi-server system [p. 399]: Involves setting up a PowerSchool SMS system on several servers, each of which might be dedicated to a specialized role [p. 401] to improve performance on a system subject to large data or traffic demands.

The main tasks involved in installing and configuring a PowerSchool SMS system are:

- Set up a Database Server.
- Set up a Web/Application Server.
- Verifying server operations.

The scope and detail of these tasks can vary significantly according to such factors as the number of servers involved, the number of databases needed, and the system's designed availability.

Setting up a Database Server involves:
1 Setting up the Database Server hardware and connect it to the network.
2 Installing the operating system (Windows 2008).
3 *Installing critical operating system updates* [p. 405].
4 *Installing Microsoft .Net Framework on a server* [p. 405].
5 (Optional) Configure Database Server cluster or high availability.
6 (Optional) Configure Database Server replication.
7 *Installing Microsoft SQL Server 2008 on a Database Server* [p. 407].
8 *Setting up the PowerSchool SMS database on a server* [p. 410].
9 *Installing the PowerSchool SMS Web Server* [p. 413]
10 *Disabling the Windows firewall* [p. 413].
11 *Enabling the MSDTC service* [p. 413].

Setting up a Web/Application Server involves:
1 Setting up the Database Server hardware and connecting it to the network.
2 Installing the operating system (Windows 2008).
3 *Installing critical operating system updates* [p. 405].
4 *Installing Microsoft .Net Framework on a server* [p. 405].
5 *Setting up IIS for Windows Server 2008* [p. 406].
6 *Installing the PowerSchool SMS Web Server* [p. 413]
7 *Disabling the Windows firewall* [p. 413].
8 *Enabling the MSDTC service* [p. 413].

9 *Starting PowerSchool SMS after installation* [p. 416].

Verifying server operations involves:

1 Verify that the PowerSchool SMS Task Manager service is set to Automatic and is running [p. 378].
2 Verify the Windows Components are installed and operating by logging into PowerSchool SMS using its default administrative account [p. 239].
3 Verify that PowerSchool SMS displays secondary pages, such as the General Preferences page. (In the **Admin** menu, click District Setup. On the District Setup page, under Preferences, click **General...**. The General Preferences page appears.)
4 Verify that PowerSchool SMS completes and prints a report [p. 115].

Installing critical operating system updates

On the server, install all critical updates, patches, service packs, and hot fixes available from Microsoft for the Windows operating system in use. For example, ensure that Windows Server 2008 is installed on the Database Server and Web Servers.

To install critical updates on a server:

1 On the server, open a web browser.
2 Go to the URL: http://www.update.microsoft.com/windowsupdate.
3 Follow the on-screen instructions to scan for and install critical updates.

Installing Microsoft .Net Framework on a server

Installation of PowerSchool SMS web and database installers requires .NET Framework 3.5 SP1 for Windows Server 2008 R2. (For information about .NET Framework, go to Microsoft's developer network library at http://msdn.microsoft.com/enus/ library/cc531167.aspx.)

On both the PowerSchool SMS database server and the web server, Application and Web server roles for .NET Framework must be set up.

To install Microsoft .NET Framework on the database server:

1 On the database server, from the Start menu, click **Administrative Tools > Server Manager**. The Server Manager window appears.
2 In the left-hand pane, click **Roles**. The Roles pane appears.
3 Click **Add Roles**. The "Before You Begin" dialog appears.
4 Click **Next**. The "Select Server Roles" dialog appears.
5 Select **Application Server**, and then click **Add Required Features**. The "Select Server Roles" dialog reappears.
6 Click **Next**.The "Application Server" dialog appears.

7 Click **Next**. The "Select Server Roles" dialog reappears, with .NET Framework 3.5.1 selected.

8 Select **Web Server (IIS)** and then click **Add Required Role Services**.

9 Click **Next**. The "Web Server (IIS)" dialog appears.

10 Click **Next**. The "Select Role Services" dialog reappears.

11 Scroll down the list of Role Services and select **IIS 6 Management Compatibility**.

12 Click **Next**. The "Confirmation Installation Selections" dialog appears.

13 Click **Install**.

To install Microsoft .NET Framework on the web server:

1 On the web server, from the Start menu, click **Administrative Tools > Server Manager**. The Server Manager window appears.

2 In the left-hand pane, click **Roles**. The Roles pane appears.

3 Click **Add Roles**. The "Before You Begin" dialog appears.

4 Click **Next**. The "Select Server Roles" dialog appears.

5 Select **Application Server**, and then click **Add Required Features**. The "Select Server Roles" dialog reappears.

6 Click **Next**.The "Application Server" dialog appears.

7 Click **Next**. The "Select Server Roles" dialog reappears, with .NET Framework 3.5.1 selected.

8 Select **Web Server (IIS)** and then click **Add Required Role Services**.

9 Click **Next**. The "Web Server (IIS)" dialog appears.

10 Click **Next**. The "Confirmation Installation Selections" dialog appears.

11 Click **Install**.

Setting up IIS for Windows Server 2008

For a server running Windows Server 2008, the administrator must configure IIS compatibility.

To set up IIS for Windows Server 2008:

1 On the Web Server, from the **Start** menu, click **Administrative Tools > Server Manager**. The Server Manager window appears.

2 In the left-hand pane, expand **Roles** and click **Web Server (IIS)**. The Web Server (IIS) pane appears.

3 Scroll to the **Role Services** section and click **Add Role Services**. The Add Role Services dialog appears.

4 Select **Application Development** and ensure the following options are selected:
  - **ASP. NET**
  - **.NET Extensibility**
  - **ASP**
  - **CGI**
  - **Server Side Includes**

5 Under Management Tools, select **IIS 6 Management Compatibility.**

6 Click **Next**. The Confirm Installation Selection dialog appears.

7 Click **Install**. The Results page appears.

8 Click **Close**.

Installing Microsoft SQL Server 2008 on a Database Server

This section contains information about the installation and configuration of SQL Server 2008 on a Database Server, which is an essential component of a PowerSchool SMS system. **Note**: The Database Server can be the same server as that on which PowerSchool SMS is installed.

For detailed instructions on installing SQL Server 2008, go to Microsoft's MSDN SQL Server Developer Center web site (http://msdn.microsoft.com/en-us/sqlserver/). To install SQL Server 2008, go to Microsoft's Download Center at http://www.microsoft.com/downloads/.

If you are upgrading from SQL Server 2000 to SQL Server 2005, download the SQL Server 2005 installation instructions from https://support.powerschool.com, Knowledgebase ID 58059 (https://support.powerschool.com/d/58059).

Important: PowerSchool SMS runs on SQL Server 2005 SP2 and SQL Server 2008 SP2 64-bit or R2 64-bit. If a system employs SQL Server 2000, before PowerSchool SMS 8.0 can be installed, the administrator must uninstall this version of SQL Server and install SQL Server 2008. **Important**: PowerSchool SMS 8.0 is the last version to support SQL 2005; therefore, we recommend that you install SQL Server 2008.

Installing SQL Server 2008 involves the following:

- *Preparing the Database Server* [p. 407]
- *Setting up SQL Server 2008* [p. 408]
- *Updating SQL Server* [p. 409]

Preparing the Database Server

Before installing SQL Server 2008, prepare your Database Server.

To prepare the Database Server:

1 Stop any third-party tools installed on the server.

2 Disconnect all users from the server.

3 Uninstall your current version of SQL Server.
- If you currently use SQL Server 2005 and are upgrading to SQL Server 2008, if a "Setting Internal Properties" error occurs [*Figure 168*], go to Microsoft support, knowledgebase number 919945 (http://support.microsoft.com/kb/919945).

4 Restart the server.

Figure 168: Setting Internal Properties error
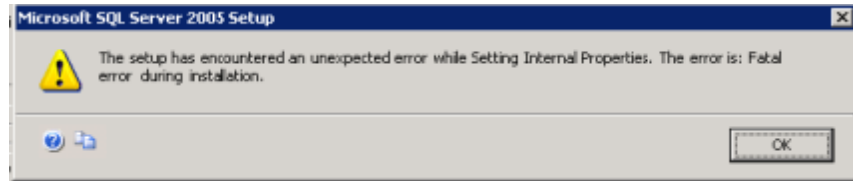
Setting up SQL Server 2008

When installing SQL Server 2008 use a dedicated domain account for Services.

To set up SQL Server 2008:

1 Ensure you have uninstalled any other version of SQL Server.
2 Install Database Engine Services with SQL Server Replication (all other components are optional).
3 If SQL Server 2008 was pre-installed, check the configuration:
   a Start SQL Server Management Studio 2008.
   b Log in using the sa account. This will verify that the Mixed Authentication Mode is being used.
   c Right-click the server and select **Properties**.
   d Ensure that the **Server Collation** is set to **SQL_Latin1_ General_CP1_CS_AS**.
   e Click the **Advanced** tab.
   f Ensure the **Degree of Parallelism** is set to **1**.
4 If you installed SQL Server 2008, change the following options:
   a Change the Server Collation to **SQL_Latin1_General_CP1_ CS_AS**.
   b For Authentication Mode, choose **Mixed Mode.**
   c Specify the sa account password.
   d Change the **Degree of Parallelism** to **1**.
   • **Note:** Leave all other options at their default values.
5 Upgrade the SQL Server client tool on all workstations to SQL Server 2008.
6 Start **SQL Server Management Studio 2008**.
7 Log in using the sa account.
8 Execute the following scripts to create a new **BUILTIN\Administrators** account:

```
EXEC master.dbo.sp_grantlogin @loginame =
N'BUILTIN\Administrators'

EXEC master.dbo.sp_defaultdb @loginame =
N'BUILTIN\Administrators ', @defdb = N'master'

EXEC master.dbo.sp_defaultlanguage @loginame =
N'BUILTIN\Administrators ', @language = N'us_english'

GO
```

9 After the scripts have executed, open the **Security** node.
10 Right-click the newly created **BUILTIN\Administrators** account, and select **Properties > Server Roles**.

11 Select **sysadmin** and click **OK**.

Updating SQL Server

Once SQL Server 2008 is installed, upgrade it with the most recent critical updates. SQL Server 2008 is available from Microsoft's Download Center at http://www.microsoft.com/downloads/. Installations instructions are included.

Setting up SQL Server for use in a PowerSchool SMS system

This section describes several important post-installation configuration tasks for SQL Server 2008. To complete these tasks, we recommend that the administrator use a dedicated domain account for Services.

- *Setting SQL Server 2008 options* [p. 409]
- *Setting parallelism* [p. 409]
- *Upgrading SQL Server client tool* [p. 410]
- *Making SQL Server accessible* [p. 410]

Setting SQL Server 2008 options

To check the pre-installed SQL Server 2008 configuration:

1 Specify the sa account password.
2 Start SQL Server Management Studio 2008.
3 Log in using the "sa" account. This will verify that the Mixed Authentication Mode is being used.
  - If not, For **Authentication Mode**, choose "Mixed Mode"**.**
4 Right-click the server and select **Properties**.
5 Ensure that the **Server Collation** is set to "SQL_Latin1_ General_CP1_CS_AS".

Note: Where the administrator encounters a Database Server with SQL Server 2008 installed, we recommend checking the configuration and adjusting it to conform if necessary.

Setting parallelism

By default, SQL Server uses all available servers. The administrator can improve the performance of SQL Server in the execution of queries by specifying the number of processors the Database Server will use for parallel execution.

To adjust the SQL Server's parallelism setting:

1 Open the SQL Server Properties (Configure) dialog.
2 Click **Processor**.
3 Under **Parallelism**, select **Use** and, for **Processor(s)**, select "1".
4 Click **OK**.

Upgrading SQL Server client tool

The administrator must upgrade the SQL Server client tool on all workstations to SQL Server 2008.

To upgrade the SQL Server client tool:

1 Start **SQL Server Management Studio 2008**.
2 Log in using the "sa" account.
3 Execute the following scripts to create a new **BUILTIN\Administrators** account:

```
EXEC master.dbo.sp_grantlogin @loginame =
N'BUILTIN\Administrators'
```

```
EXEC master.dbo.sp_defaultdb @loginame =
N'BUILTIN\Administrators ', @defdb = N'master'
```

```
EXEC master.dbo.sp_defaultlanguage @loginame =
N'BUILTIN\Administrators ', @language = N'us_english'
```

```
GO
```

4 After the scripts have executed, open the **Security** node.
5 Right-click the newly created **BUILTIN\Administrators** account, and select **Properties > Server Roles**.
6 Select **sysadmin** and click **OK**.

Making SQL Server accessible

The administrator must make SQL Server available to the network.

Make the SQL Server accessible:

1 Run SQL Server Configuration Manager.
2 In the left pane, under "SQL Server Network Configuration", select "Protocols for <MSSQLSERVER NAME>".
3 In the right pane, under **Protocol**, right-click "TCP/IP".
4 From the menu, choose **Enable**.

Setting up the PowerSchool SMS database on a server

Setting up the PowerSchool SMSdatabase on a server involves:

- *Installing the database files* [p. 410]
- *Adding a database* [p. 411]

Installing the database files

The PowerSchool SMS database installer enables the administrator to install the files needed to create the PowerSchool SMS database.

To install the PowerSchool SMS database files:

1 On the Database Server, make sure **Microsoft SQL Server** is running.

2 In the browser on the Database Server, go to https://support.powerschool.com. Enter your Username and Password, and click **Login**.

3 Click the **Support** tab. The Support page appears.

4 Click **Downloads**. The Downloads page appears.

5 Click **PowerSchool SMS** folder.

6 Under Get PowerSchool SMS, click **PowerSchool SMS<version>.**
   - Or, click the **Releases and Updates** folder, then the PowerSchool SMS folder.

7 Under **Available Resources**, double-click **PowerSchool_SMS_ <version.build>_DB_Installer.exe**.

8 In the dialog, click **Save File**.

9 In the Welcome dialog, click **Next**.

10 Navigate to the location of your download file and double-click double-click **PowerSchool_SMS_<version.build>_DB_ Installer.exe**.

Adding a database

When the administrator installs the PowerSchool SMS database, the Microsoft SQL Server login name that you specified when you installed SQL Server automatically maps to the PowerSchool SMS database user name database owner (DBO).

The SQL Server login name must also be used to set up the database connection to Windows Task Manager. This connection associates the SQL login name with the Data Access View Generator, which runs as a process in Windows Task Manager.

Important: If the PowerSchool SMS installer and PowerSchool SMS Task Manager use different login IDs to connect to the database, the Data Access View Generator might not run correctly. To resolve this issue, drop one login and use the other for all connections. Alternatively, create a new login and use it for all connections. To ensure the new (or existing) login ID is the user and the database owner in PowerSchool SMS, execute the stored procedure `sp_changedbowner` in the PowerSchool SMS database.

To add the PowerSchool SMS database [DA[1]]:

1 From the **Start** menu, click **Control Panel > Add/Remove Programs**.

2 In the Add/Remove Programs dialog, select **PowerSchool SMS Database <build>**. Click **Change**.

3 In the Maintain Databases or Remove Installer... dialog, click **Database Maintenance**. Click **Next**.

4 In the Add, Maintain, or Disable the databases... dialog [*Figure 169*], click **Add Database**.

---

[1]You can do this if your role is District Administrator.

Figure 169: Database Identification dialog
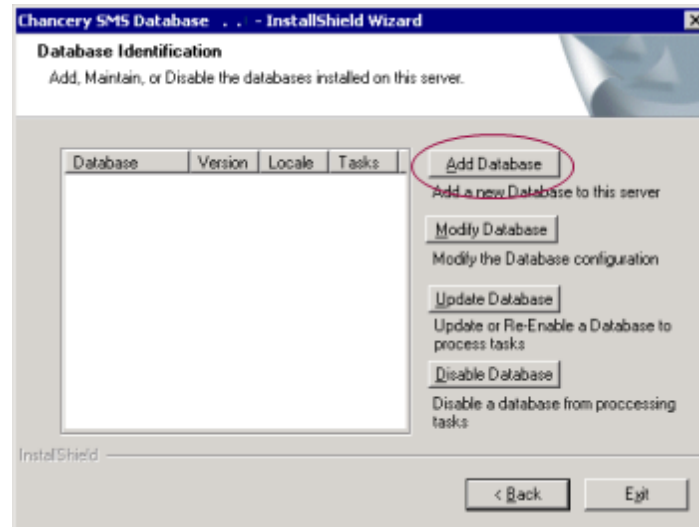
5 In the Select the type of database... dialog, select **Create Active Database**. Click **Next**.

6 In the Type database Identification information... dialog, enter the SQL administrator password and a database name, user name, and password.

7 Click **Next**.

8 In the District Information dialog, enter the district name, district number, and localization.

9 If you want your district to use the Family Management feature in PowerSchool SMS, select **Use Family Management**.

10 Click **Next**.

11 In the Database Identification dialog [*Figure 170*], select the appropriate **Database Structure**:

- If you want the installer to create the database file group, select **Simple structure**.
- If you want to customize the file group layout, select **User Defined**.

Figure 170: Database Identification dialog - district database
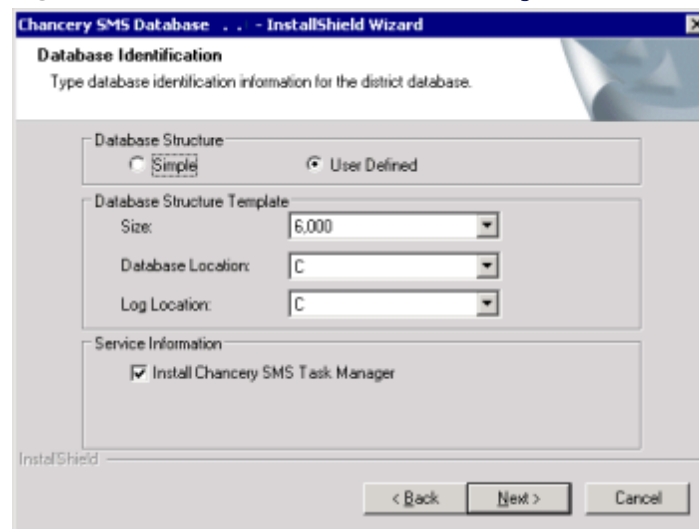
12 In the **Database Structure Template** section, select the size, database location, and log location.
- If you only have one local drive (C:), the database will be created in C:\CSL\.

13 In the **Service Information** section, ensure **Install PowerSchool SMSTask Manager** is selected. Click **Next**.

14 In the Start Copying Files dialog, click **Next**. The database installation begins and may take a few minutes.

15 In the Database Complete Creation dialog, click **OK**.

16 Click **Exit**.

Disabling the Windows firewall

On a system that employs PowerTeacher Gradebook or ParentConnectXP, we recommend that the administrator disable the Windows firewall on the Database Server.

Enabling the MSDTC service

On a system that uses PowerTeacher gradebook or ParentConnectXP, we recommend that the administrator enable the Windows Microsoft Distributed Transaction Coordinator (MSDTC) service on each Database Server.

Installing the PowerSchool SMS Web Server

To complete the installation of thePowerSchool SMS Web Server, you need the following:

- A local machine account, with administrative privileges.
- The Database Server name, or IP address, and the SQL Server system administrator Username and Password.
- The PowerSchool SMS database name and the local administrator user name and password for the PowerSchool SMS Database Server.
- The tasks to be handled by the server (reports, scheduling tasks, and so on).
- Windows Server 2008 (CD or network access) so that you can select the necessary Windows components.

To install the PowerSchool SMSWeb Server on the Web Server machine:

1 In the browser on the Web Server, go to https://support.powerschool.com.

2 Enter your Username and Password, and click **Login**.

3 Click the **Support** tab. The Support page appears.

4 Click **Downloads**. The Downloads page appears.

5 Click **PowerSchool SMS** folder.

6 Under Get PowerSchool SMS, click **PowerSchool SMS<version>.**
- Or, click the **Releases and Updates** folder, then the PowerSchool SMS folder.

7 Under **Available Resources**, double-click **PowerSchool_SMS_ <version.build>_Web_Installer.exe**.

8 In the dialog, click **Save File**.

9 In the Welcome dialog, click **Next**.

10 Navigate to the location of your download file and double-click double-click **PowerSchool_SMS_<version.build>_Web_ Installer.exe**.

11 In the Security dialog, click **Run**.

12 In the Welcome dialog, click **Next**.

13 In the Software License Agreement dialog, review the agreement and select **I accept the terms of the license agreement**. Click **Next**.

14 In the Database Server dialog, enter the Database Server name or IP address.

15 Enter the SQL Server Administrator login ID and password. Click **Scan Databases**.

16 For **Database**, select the database the Web Server will connect to. Click **Next**.

17 In the Server Configuration Options dialog, select this server's role(s) [p. 401].
- If the server is the only server in the PowerSchool SMS system, ensure that all the roles are selected.
- For a system that employs more than one server [p. 399], the administrator can select only specific roles as long as each role is assigned to at least one server.

18 Adjust each role's maximum processes, as necessary see *Server role maximum process values* [p. 402].

19 Click **Next**.

20 In the Com+Serv dialog, enter the Local System Administrator ID and Password.
- Ensure that the administrator account password matches that of the COM+ object see *Synchronizing the COM+ object password* [p. 388].

21 Click **Next**.
- Do not enter a Windows domain account user name or password. If you do not use a local computer account, PowerSchool SMS cannot connect to the database.

22 In the Ready to Install the Program dialog, click **Install**.

23 When the Installation Complete dialog notifies you that the installation was successful, click **Finish**.

24 Restart the Web Server.

Securing the Web Server using Secure Socket Layer (optional)

Your district has the option of securing the Web Server using the Secure Socket Layer (SSL) features in Internet Information Services (IIS). To do this, you need a certificate for each web site, that is, for each unique fully-qualified domain name.

To secure a web site, you need to:

- Create a certificate request.
- Request and retrieve a certificate from a vendor.

- Install the certificate.
- Secure the web site.

Note: If your system is to employ a hardware SSL acceleration device, refer to the documentation that came with the device.

To create a certificate request:

1 On the Web Server, from the **Start** menu, click **Control Panel > Administrative Tools > Internet Information Services (IIS) Manager**.
2 In the Internet Information Services dialog, expand the folders.
3 Right-click **Default Web Site** and, from the menu, select **Properties**.
4 In the Default Web Site Properties dialog, click the **Directory Security** tab. Click **Server Certificate**.
5 On the Web Server Certificate Wizard, on the **Welcome** page, review the information detailing the status of your Web Server. Click **Next**.
6 In the Server Certificate dialog, select **Create a New Certificate**. Click **Next**.
7 In the Delayed or Immediate Request dialog, select **Prepare the request now, but send it later**. Click **Next**.
8 In the Name and Security Settings dialog, enter a name for the certificate and specify 1024 bit lengths. Click **Next**.
9 On the Organization Information page, in the **Organization** field, enter the name of the district requesting the certificate. In the **Organizational Unit** field, enter the name of the department requesting the certificate, such as "Security". Click **Next**.
10 On the Your Site's Common Name page, in the **Common Name** field, the wizard populates the name of the Web Server that the certificate will be issued for. Click **Next**.
11 On the Geographical Information page, for **Country/Region** and **City/Locality**, select the information that applies to your district. Click **Next**.
12 On the Certificate Request File Name page, in the **File Name** field, accept the default location. Click **Next**.
   - Note the location of this file. You will need the file path when you install the certificate.
13 On the Request File Summary page, verify the information is correct. Click **Next**.

To request and retrieve a certificate:

1 Open your web browser and navigate to a vendor's web site. Possible vendors are Verisign (www.verisign.com), Thawte (www.thawte.com), or Entrust (www.entrust.com).
2 Follow the instructions on the vendor's web site for requesting a certificate and, later, for retrieving the certificate. When requesting a certificate, you will need the file created in step 12, above.
   - There is a fee for each certificate.

3 When you have retrieved your certificate, you are ready to install it on your Web Server.

To install the certificate:

1 On the Web Server, from the **Start** menu, click **Programs > Administrative Tools > Internet Information Services Manager**.

2 In the Internet Information Services dialog, expand the folders and right-click the **Default Web Site**. From the menu, select **Properties**.

3 In the Properties dialog, on the **Directory Security** tab, click **Server Certificate**.

4 In the **Web Server Certificate Wizard**, click **Next** until the **Pending Certificate Request** page displays.

5 On the Pending Certificate Request page, select **Process the pending request and install the certificate**. Click **Next**.

6 On the Process a Pending Request page, in the **Path and File name** field, enter the path where you recorded the certificate when you created the certificate request. Click **Next**.

7 On the Certificate Summary page, verify the information. Click **Next**, and then click **Finish**.

To secure the web site:

1 On the Web Server, from the **Start** menu, click **Programs > Administrative Tools > Internet Information Services Manager**.

2 In the Internet Information Services dialog, select and right-click the virtual directory you want to secure, such as Web Server or GBServer. From the menu, select **Properties**.

3 In the Properties dialog, on the **Directory Security** tab, in the **Secure Communications section**, click **Edit**.

4 On the Secure Communications dialog, select **Require Secure Channel (SSL)** and **Require 128-Bit Encryption**. Click **OK**.
- To access the web site after it is secure, use "https" in the URL, not "http".

Starting PowerSchool SMS after installation

After you install PowerSchool SMS, start the application and change the password.

To start PowerSchool SMS:

1 In your web browser, enter **http://<servername or IP address>powerschoolsms/**

2 In the sign in dialog, click **Change Password**.

3 Complete the following fields:
- **User ID**: Enter "Admin".
- **Password**: Enter "admin".

- **New Password**: Enter a password that is a minimum of six alphabetical characters in upper and lower case, and that has a minimum of two non-repeating numeric or special characters.
- **Confirm Password**: Re-enter the new password.

4 Click **Sign In**.
- For information about changing the PowerSchool SMS sign in password complexity, download the *PowerSchool SMS Setting Up Strong Log on Passwords Technical Bulletin* from https://support.powerschool.com//d/56117.

Installing PowerSchool SMS reports

PowerSchool SMS includes many reports [p. 130] for various feature areas. Some reports are built-in [p. 594]; that is, they install automatically when you install PowerSchool SMS. Newer reports, which are built on the PowerSchool SMS schema, a District Administrator installs separately as a Report Package. Report Package reports include Attendance, Grading, Health, Scheduling, Student Behavior, and Test Management reports [p. 533].

For a catalog of reports available for PowerSchool SMS, refer to *PowerSchool SMS Report Package reports* [p. 533]. For instructions on installing reports, refer to *Report packages* [p. 130]

Upgrading an existing system

This section describes how to upgrade a PowerSchool SMS system to version 8.0. This involves:

- *Pre-upgrade considerations* [p. 417]
- *Ensuring data integrity during the upgrade* [p. 420]
- *Downloading PowerSchool SMS files* [p. 421]
- *Installing Microsoft SQL Server 2008* [p. 381] (if required)
- *Upgrading the PowerSchool SMS database* [p. 421]
- *Upgrading the PowerSchool SMS Web Server* [p. 423]
- *Post-upgrade tasks* [p. 424]

Pre-upgrade considerations

Please take note of the following advice and prerequisites before you begin to upgrade a PowerSchool SMS system to version 8.0:

- *Planning PowerSchool SMS upgrades* [p. 417]
- *Upgrade to SQL Server 2008* [p. 418]
- *Confirm state/province reporting compatibility* [p. 418]
- *Upgrading older versions of SMS* [p. 419]

Planning PowerSchool SMS upgrades

We recommend that the District Administrator plan the implementation of future upgrades to the PowerSchool SMS software. Typically, major upgrades

include new features that may affect processes and the user experience.

An upgrade implementation plan should take into account:

- Potential changes to procedures.
- Testing new features against actual school district data before deploying the upgraded software in the actual production environment. Caution: Conduct testing on a server dedicated to testing and training and keep it separate from the production environment.
- Piloting new features to ensure users understand and adopt the changed procedures
- Training [p. 394] for all users, including teachers, user support staff, School Administrators, and database administrators.
- A comprehensive rollout strategy.

Upgrade to SQL Server 2008

PowerSchool SMS 8.0 is compatible with SQL Server 2005 and SQL Server 2008 (SP2 64-bit or R2 64-bit). If your system is running Microsoft SQL Server 2000 or 2005 with a Chancery SMS version older than 6.7.3, and you want to upgrade to SQL Server 2008, refer to *Installing Microsoft SQL Server 2008* [p. 381].

If your system is running a Chancery SMS version older than 6.7.3, and you want to upgrade to SQL Server 2008 SP2 64-bit or R2 64-bit at the same time that you upgrade to PowerSchool SMS 8.0, you must first upgrade to PowerSchool SMS 6.7.3, then install SQL Server 2008 and SP2, before you upgrade to PowerSchool SMS 8.0. see also *Upgrading older versions of SMS* [p. 419]

If your system is running Microsoft SQL Server 2000 and you are not prepared to upgrade to SQL Server 2008, you should not upgrade to PowerSchool SMS 8.0. If you have any questions or concerns, contact Technical Support [see p.1].

Confirm state/province reporting compatibility

If you are running a state/provincial reporting solution, prior to upgrading to this version of PowerSchool SMS, confirm state/provincial reporting compatibility. See https://support.powerschool.com for up-to-date state/province reporting information.

PowerSchool SMS supports:

- Generic reporting functionality for US States and Canadian Provinces.
- Tennessee State Reporting. Reporting is generated by PowerSchool SMS using data entered into PowerSchool SMS.
- Florida State Reporting.
- Michigan SRSD State Reporting. SRSD functionality is available through a solution partner.
- Texas PEIMS State Reporting. Reporting is available at all school levels through PowerSchool SMS.

- British Columbia 1701, 1704, and Passport to Education.

Microsoft critical updates

On all your servers, install all of Microsoft's critical updates to the operating system and server software. To get these updates, go to http://www.microsoft.com/downloads and http://www.update.microsoft.com.

Upgrading older versions of SMS

System administrators can install PowerSchool SMS version 8.0 on a system running any of the following versions of SMS:

- Chancery SMS 7.7.1
- Chancery SMS 7.7.0
- Chancery SMS 7.6.0, 7.6.1, 7.6.2
- Chancery SMS 7.5.0, 7.5.1, 7.5.2
- Chancery SMS 7.4.0, 7.4.1
- Chancery SMS 7.3.0, 7.3.1
- Chancery SMS 7.2.0
- Chancery SMS 7.1.0, 7.1.1, 7.1.2
- Chancery SMS 7.0.0
- Chancery SMS 6.7.0 to 6.7.3
- Chancery SMS 6.6.0 to 6.6.8
- Chancery SMS 6.5.0 to 6.5.5
- Chancery SMS 6.4.0
- Chancery SMS 6.3.0
- Chancery SMS 6.2.0, 6.2.1
- Chancery SMS 6.1.0
- Chancery SMS 6.0.0, 6.0.1
- Chancery SMS 4.3.0 to 5.0.0

If the district is using an older version of PowerSchool SMS or a version of Open District, contact Pearson Technical Support for help with the upgrade.

Do not install PowerSchool SMS version 8.0 if:

- You are running Microsoft® SQL Server 2000.
- You are running Open District on an Oracle® server. PowerSchool SMS is not compatible with an Oracle database.
- You are using the Open District CA CSIS Database Installation. PowerSchool SMS is not compatible with an Open District SA CSIS database.

For other requirements and compatibilities, refer to *System requirements* [p. 395].

Note: To support the changes to student contact and enrollment information, the PowerSchool SMS 8.0 installer converts affected data to the revised schema. This includes the merging of duplicate contacts into a single contact [p. 423], the conversion of contacts' 2-line addresses to 5-field addresses, cTools contact data to a new cTools extension schema, and

Customization Data Management (CDM) status codes to cTools fields. Refer to the 📄 *Converting to PowerSchool SMS 8.0* technical bulletin.

Roles and upgrading

If you are upgrading from Open District 2.4 or an older version of PowerSchool SMS (prior to PowerSchool SMS 4.0), make sure you do not have any existing roles that match the names of the following base roles. If these roles exist, you might encounter exception errors when upgrading.

PowerSchool SMS comes with the following pre-defined base roles:

- Administrator
- School Administrator
- Teacher
- School Secretary
- Guest (system base role required for upgrades)
- District Health Professional
- School Health Professional

Caution: From version 4.0 onwards,PowerSchool SMS needs exclusive use of the Guest role when upgrading. During the upgrade, user accounts that cannot be assigned an appropriate role are assigned the Guest role. If you have created a role named "Guest" during the upgrade, the upgrade will fail. After the upgrade, check for any users with a Guest role and assign the proper role to them, then delete the Guest role. Do not leave users assigned to the Guest role.

Ensuring data integrity during the upgrade

During the upgrade process, we recommend several procedures to ensure that the post-upgrade data is accurate for reporting purposes and that all fixes available in the upgrade have been propagated to the data.

Before starting the upgrade process, take the following steps:

- Back up your database.
- Ensure the Web and Database Servers have DNS entries.
- Ensure you are running Microsoft®SQL Server® 2005 (SP2) or SQL Server 2008 (SP2 64-bit or R2 64-bit).
- Close all applications and restart your computer.
- If you cannot see the file types, change the computer's folder options to show file name extensions.
- For Microsoft Windows, ensure that any computer that a user uses to view PowerSchool SMS is equipped with an appropriate web browser see *User access requirements* [p. 398].

During the upgrade process, keep the following in mind:

- Restart your computer whenever prompted or given the option to do so.
- Follow the steps that apply to your setup in their exact order.

Downloading PowerSchool SMS files

Download the required upgrade files from the support site or other web sites specified by your district. You will need an appropriate user name and password.

To download files from the support site:

1 Create a folder on your hard drive that will contain the PowerSchool SMS upgrade files.
2 In the browser on the Web Server, go to https://support.powerschool.com.
3 Enter your Username and Password, and click **Login**.
4 Click the **Support** tab. The Support page appears.
5 Click **Downloads**. The Downloads page appears.
6 Click **PowerSchool SMS** folder.
7 Under Get PowerSchool SMS, click **PowerSchool SMS<version>.**
   - Or, click the **Releases and Updates** folder, then the PowerSchool SMS folder.
8 On the release download page, view **Available Resources**.
9 Download the files and documentation to the folder you created in step 1.
   - To determine which files you need for each stage of the PowerSchool SMS upgrade, refer to the rest of this document.

Upgrading the PowerSchool SMS database

You need the following information to complete the upgrade:

- SQL Server system administrator Username and Password
- Database name
- Database owner user name
- Database owner password

To upgrade the PowerSchool SMSdatabase, do the following (Caution: Perform these steps in strict order):

- *Step 1: Disable the existing database* [p. 421].
- *Step 2: Remove the existing web installer* [p. 422].
- *Step 3: Remove the existing database installer* [p. 422].
- *Step 4: Add the new database installer* [p. 422].
- *Step 5: Upgrade the database* [p. 423].

Before beginning the upgrade process, ensure the server has enough hard drive space; refer to *System requirements* [p. 395].

Step 1: Disable the existing database

To disable the existing database:

1 On the Database Server, from the **Start** menu, click **Control Panel > Add or Remove Programs**.

2 In the Add or Remove Programs dialog, select **PowerSchool SMS Database <version>**.
3 Click **Change**.
4 In the Database Identification dialog, select **Database Maintenance**.
5 Click **Next**.
6 In the second Database Identification dialog, select the database you want to disable, and then choose **Disable Database**.
7 In the Confirmation dialog, click **OK**.
8 Click **Exit**.

Step 2: Remove the existing web installer

To remove the existing web installer:

1 On the Web Server, from the **Start** menu, click **Control Panel > Add or Remove Programs**.
2 In the Add or Remove Programs dialog, select **PowerSchool SMS Web <version>**. Click **Change**.
3 In the Web Configuration dialog, click **Remove Web Server**.
4 Click **Next**.
5 In the Confirmation dialog, click **Yes**.
6 Click **Finish**.

Step 3: Remove the existing database installer

To remove the existing database installer:

1 On the Database Server, from the **Start** menu, click **Control Panel > Add or Remove Programs**.
2 In the Add or Remove Programs dialog, select **PowerSchool SMS Database <version>**.
3 Click **Change**.
4 In the Database Identification dialog, click **Remove Installer**.
5 Click **Next**.
6 In the Question dialog, click **Yes**.
7 Click **Finish**.
8 Close the Add or Remove Programs dialog.

Step 4: Add the new database installer

To add the new database installer:

1 Navigate to the folder you created on your hard drive that contains the PowerSchool SMS upgrade files.
2 Double-click **Chancery_SMS_<version.build>_DB_ Installer.exe.**
3 Follow the on-screen instructions.

Step 5: Upgrade the database

Caution: When you upgrade the main PowerSchool SMS database, the process also upgrades the tables in the Historical Database, if one exists; some tables may be deleted. Thus, before you update the main database, preserve the Historical Database by backing it up.

Note: When upgrading the database to PowerSchool SMS 8.0 from an older version, the installer displays a Database Update Option dialog that asks the administrator to select a contact matching and merging method. The options are:

- Exact match on first and last name and exact match on either phone or address.
- Near match on first name, exact match on last name and exact match on either phone or address.
- Near match on first and last name and exact match on either phone or address.

For more information, refer to the *Converting to PowerSchool SMS 8.0* technical bulletin.

To upgrade the database:

1 On the Database Server, from the **Start** menu, click **Control Panel > Add or Remove Programs**.
2 In the Add or Remove Programs dialog, select your Database Server, for example, **PowerSchool SMSDatabase <version>**. Click **Change**.
3 In the Database Identification dialog, choose **Database Maintenance** and click **Next**.
4 In the second Database Identification dialog, select a database and click **Update Database**.
5 Enter the following information (as it was used to create the database initially):
    - **SQL Administrator Password**
    - **Database Name**
    - **Database Username**: Use the user name of the database owner (dbo), not the SQL administrator.
    - **Database Password**: Use the password of the database owner (dbo), not the SQL administrator.
6 Click **Next**.
7 Select **Install PowerSchool SMS Task Manager**.
8 Click **Next**.
9 To complete the process, follow the on-screen instructions.
10 When the database installation is complete, click **Exit**.

Upgrading the PowerSchool SMS Web Server

To complete the installation of the PowerSchool SMSWeb Server, you need the following:

- A local machine account, with administrative privileges.

- The Database Server name, or IP address, and the SQL Server system administrator user name and password.
- The PowerSchool SMS database name, the Windows domain, user name, and password for the PowerSchool SMS Database Server.

Note: Before you upgrade the PowerSchool SMS Web Server, ensure you have removed the previous web installer see *Step 2: Remove the existing web installer* [p. 422].

Note: Districts can secure a Web Server using SSL. You will need a security certificate for each web site. For more information, refer to *Securing the Web Server using Secure Socket Layer (optional)* [p. 414].

To upgrade the PowerSchool SMS Web Server:

1 In the folder in which you downloaded the Chancery SMS upgrade files, double-click **Chancery_SMS_<version.build>_ Web_Installer.exe**
2 In the InstallShield Wizard, click **Next**.
3 In the License Agreement dialog, choose **I accept the terms of the license agreement** and click **Next**.
4 In the Database dialog, enter or select the Database Server the Web Server will connect to and enter the database login ID (database user name) and password for that database. Click **Scan Database**.
5 Enter or select a database.
6 Click **Next**.
7 In the Server Configuration Options dialog, select the applicable settings.
   - For detailed information about server configuration setup, refer to *Multi-server configuration* [p. 399].
8 Click **Next**.
9 In the Com+Serv dialog, enter the Local System Administrator ID and password.
   - Do not enter a Windows domain account user name or password. If you do not use a local computer account, PowerSchool SMS cannot connect to the database.
10 Click **Next**.
11 In the Ready to Install the Program dialog, click **Install**.
12 When the Installation Complete dialog notifies you that the installation was successful, click **Finish**.
13 Restart the Web Server.

Post-upgrade tasks

After upgrading PowerSchool SMS, complete the following tasks:

- *Run processes and diagnostics* [p. 425]
- *Configure Web Server tasks* [p. 425]
- *Connect to a different database (optional)* [p. 425]
- *Re-applying a cTools package (optional)* [p. 426]

Run processes and diagnostics

After the upgrade, perform the following tasks:

- Run data mapping [p. 168].
- Wait for the overnight processes to complete.

If you have upgraded from Microsoft SQL Server 2000 to SQL Server 2005 or 2008, perform the following tasks:

1 Check for I/O errors (ensures pages were not corrupted since they were last written to the disk) by executing the following once:
   ```
   ALTER <your database name> SET PAGE_VERIFY
   CHECKSUM;
   ```
2 Create missing statistics on columns used by indexes by executing either the first or second statement after each upgrade:
   ```
   EXEC sp_createstats 'indexonly';
   ```
   (This will create statistics using the default sampling rate.)
   OR
   ```
   EXEC sp_createstats 'indexonly', 'fullscan';
   ```
   (This will create statistics using full scan.)

Configure Web Server tasks

You can edit Server Configuration settings and maximum process values as needed.

To configure Web Server tasks:

1 From the **Start** menu, choose **Control Panel > Add or Remove Programs**.
2 Select **PowerSchool SMS Web 8.0** and click **Change**.
3 Choose **Configure Web Server Tasks** and click **Next**.
4 In the Server Configuration Options dialog, edit server settings and Maximum Process values as required see *Server role maximum process values* [p. 402].
5 Enter or select a database.
6 Click **Next**.
7 In the Maintenance Complete dialog, click **Finish**.

Connect to a different database (optional)

You can connect PowerSchool SMS Web Servers to a different database or a different Database Server as needed.

To connect to a different database:

1 From the **Start** menu, choose **Control Panel > Add or Remove Programs**.
2 In the Web Configuration dialog, select **PowerSchool SMSWeb 8.0**. Click **Change**.
3 Select **Configure Web Server Credentials**. Click **Next**.

4   In the Database dialog, enter or select the Database Server you want the Web Server to connect to and enter the database login ID (database user name) and password for that database. Click **Scan Database**.

5   Enter or select a database.

6   Click **Next**.

7   In the Maintenance Complete dialog, click **Finish**.

Re-applying a cTools package (optional)

When you install PowerSchool SMS, a core cTools package is automatically installed. If your system uses a custom cTools package [p. 523] that was created before Chancery SMS 6.6, you must re-apply the package to the PowerSchool SMS system.

General system configuration tasks

- *Network port configuration* [p. 426]
- *Changing the PowerSchool SMS eDocs location* [p. 432]
- *Adjusting the student search results limit* [p. 432]

Network port configuration

For a multi-server configuration [p. 399], *Table 65* [p. 426] offers the administrator guidance on the ports used for communications with each type of server while *Table 66* [p. 428] offers guidance on server-to-server communications.

Table 65: Network ports for communication with each server type

Server	Application protocol	Port[a]	Network protocol[b]	Traffic flow	Notes
All servers	RDP[c]	3389	TCP[d]	Ingress	Optional[e]
All servers	DNS[f]	53	TCP/UDP[g]	Egress	

[a] **Port; Additional ports may be needed for Active Directory (AD) domain communications, such as UDP 445, TCP 88, UDP 88.**

[b] **Network protocol: SMTP network protocols may need additional ports such as TCP 465/587, depending on the configuration.**

[c] RDP: Remote Desktop Protocol. Proprietary Microsoft protocol built in to Windows that enables a user to control another remote computer using a graphical interface.

[d] TCP: Transmission Control Protocol. Transport layer connection-oriented protocol requiring handshaking to set up end-to-end communications with reliable data delivery.

[e] Optional: Not required for basic default installation. The value is a suggestion and subject to the system configuration and applications and features in use.

[f] *DNS*: Domain Name System. Converts host names and domain names into IP addresses on the Internet or on local networks that use the TCP/IP protocol.

[g] *UDP*: User Datagram Protocol - Simple Transport layer message-based connection-less protocol used for real-time data delivery with low overhead and lower reliability.

Server	Application protocol	Port[a]	Network protocol[b]	Traffic flow	Notes
All servers	SMTP[c]	**25**	TCP	Egress	Optional
All servers	AD[d]	**445**	TCP	Egress	Optional
PowerSchool SMS Web/Application Server	HTTP[e]	**80**	TCP	Ingress	
PowerSchool SMS Web/Application Server	HTTPS[f]	**443**	TCP	Ingress	Optional
PowerSchool SMS Web/Application Server	SQL[g]	**1433**	TCP	Egress	
PowerSchool SMS Web/Application Server	SQL	**1434**	UDP	Egress	Optional
PowerSchool SMS Web/Application Server	MSDTC[h]	**135**	TCP	Both	
PowerSchool SMS Database Server	SQL	**1433**	TCP	Ingress	
PowerSchool SMS Database Server	SQL	**1434**	UDP	Ingress	Optional
PowerSchool SMS Database Server	SQL	**1433**	TCP	Egress	
PowerSchool SMS Database Server	SQL	**1434**	UDP	Egress	Optional
PowerSchool SMS Database Server	MSDTC	**135**	TCP	Both	
PowerTeacher Gradebook Web/Application Server	HTTP	**7880**	TCP	Ingress	
PowerTeacher Gradebook Web/Application Server	HTTPS	**7443**	TCP	Ingress	Optional
PowerTeacher Gradebook Web/Application Server	SQL	**1433**	TCP	Egress	
PowerTeacher Gradebook Web/Application Server	SQL	**1434**	UDP	Egress	Optional
PowerTeacher Gradebook Database Server	SQL	**1433**	TCP	Ingress	
PowerTeacher Gradebook Database Server	SQL	**1434**	UDP	Ingress	Optional

[a] **Port; Additional ports may be needed for Active Directory (AD) domain communications, such as UDP 445, TCP 88, UDP 88.**

[b] **Network protocol: SMTP network protocols may need additional ports such as TCP 465/587, depending on the configuration.**

[c] *SMTP*: Simple Mail Transfer Protocol. The standard e-mail protocol used on the Internet that servers and other mail transfer agents use to send and receive mail messages.

[d] *AD*: Active Directory. An advanced, hierarchical directory service that comes with Windows servers typically used for user authentication and a variety of related network services.

[e] *HTTP*: HyperText Transfer Protocol. The communications protocol used to connect to Web servers on the Internet and also on a network.

[f] *HTTPS*: HyperText Transfer Protocol Secure. HTTP combined with the SSL/TLS (Secure Sockets Layer/Transport Layer Security) protocol to provide encrypted communication and secure identification of a network web server.

[g] *SQL*: Structured Query Language. A database computer language used for managing and processing data in a relational database

[h] *MSDTC*: Microsoft Distributed Transaction Coordinator service in Windows. Coordinates transactions, typically for components with COM and .NET architectures, that span multiple resource managers, such as databases, message queues, and file systems.

Server	Application protocol	Porta	Network protocolb	Traffic flow	Notes
PowerTeacher Gradebook Database Server	MSDTC	**135**	TCP	Both	
ParentCONNECTxp Web/Application (Display) Server	HTTP	**80**	TCP	Ingress	
ParentCONNECTxp Web/Application (Display) Server	HTTPS	**443**	TCP	Ingress	
ParentCONNECTxp Web/Application (Display) Server	SQL	**1433**	TCP	Egress	
ParentCONNECTxp Web/Application (Display) Server	SQL	**1434**	UDP	Egress	Optional
ParentCONNECTxp Data Process Server	SQL	**1433**	TCP	Ingress	Optional
ParentCONNECTxp Data Process Server	SQL	**1434**	UDP	Ingress	Optional
ParentCONNECTxp Data Process Server	SQL	**1433**	TCP	Egress	
ParentCONNECTxp Data Process Server	SQL	**1434**	UDP	Egress	Optional
ParentCONNECTxp Database Server	SQL	**1433**	TCP	Ingress	
ParentCONNECTxp Database Server	SQL	**1434**	UDP	Ingress	Optional
ParentCONNECTxp Database Server	MSDTC	**135**	TCP	Both	

Table 66: **Network ports for server-to-server communications**

Source	Source port	Destination port	Destination	Protocol
PowerSchool SMS system support users	Any	**3389**	All servers	TCP
All servers	Any	**53**	All servers	BOTH
All servers	Any	**25**	Mail Relay Server	TCP
All servers	Any	**445**	Active Directory Domain	TCP
PowerSchool SMS system users	Any	**80**	PowerSchool SMS Web/Application Server	TCP
PowerSchool SMS system users	Any	**443**	PowerSchool SMS Web/Application Server	TCP
PowerTeacher Gradebook Database Server	Any	**135**	PowerSchool SMS Web/Application Server	TCP

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[a] **Port; Additional ports may be needed for Active Directory (AD) domain communications, such as UDP 445, TCP 88, UDP 88.**

[b] **Network protocol: SMTP network protocols may need additional ports such as TCP 465/587, depending on the configuration.**

Source	Source port	Destination port	Destination	Protocol
PowerSchool SMS Web/Application Server	Any	**1433**	PowerSchool SMS Database Server	TCP
PowerSchool SMS Web/Application Server	Any	**1434**	PowerSchool SMS Database Server	UDP
PowerTeacher Gradebook Database Server	Any	**135**	PowerSchool SMS Database Server	TCP
ParentCONNECTxp Database Server	Any	**135**	PowerSchool SMS Database Server	TCP
ParentCONNECTxp Data Process Server	Any	**1433**	PowerSchool SMS Database Server	TCP
ParentCONNECTxp Data Process Server	Any	**1434**	PowerSchool SMS Database Server	UDP
ParentCONNECTxp Data Process Server	Any	**135**	PowerSchool SMS Database Server	TCP
PowerSchool SMS system support users	Any	**1433**	PowerSchool SMS Database Server	TCP
PowerSchool SMS system support users	Any	**1434**	PowerSchool SMS Database Server	UDP
PowerSchool SMS system users	Any	**7880**	PowerTeacher Gradebook Web/Application Server	TCP
PowerSchool SMS system users	Any	**7443**	PowerTeacher Gradebook Web/Application Server	TCP
PowerTeacher Gradebook Web/Application Server	Any	**1433**	PowerTeacher Gradebook Database Server	TCP
PowerTeacher Gradebook Web/Application Server	Any	**1434**	PowerTeacher Gradebook Database Server	UDP
PowerSchool SMS Web/Application Server	Any	**1433**	PowerTeacher Gradebook Database Server	TCP

Source	Source port	Destination port	Destination	Protocol
PowerSchool SMS Web/Application Server	Any	**1434**	PowerTeacher Gradebook Database Server	UDP
PowerSchool SMS Web/Application Server	Any	**135**	PowerTeacher Gradebook Database Server	TCP
PowerSchool SMSDatabase Server	Any	**1433**	PowerTeacher Gradebook Database Server	TCP
PowerSchool SMS Database Server	Any	**1434**	PowerTeacher Gradebook Database Server	UDP
PowerSchool SMS Database Server	Any	**135**	PowerTeacher Gradebook Database Server	TCP
PowerSchool SMS system support users	Any	**1433**	PowerTeacher Gradebook Database Server	TCP
PowerSchool SMS system support users	Any	**1434**	PowerTeacher Gradebook Database Server	UDP
PowerSchool SMS system users	Any	**80**	ParentCONNECTxp Web/Application (Display) Server	TCP
PowerSchool SMS system users	Any	**443**	ParentCONNECTxp Web/Application (Display) Server	TCP
PowerSchool SMS Database Server	Any	**135**	ParentCONNECTxp Data Process Server	TCP
ParentCONNECTxp Database Server	Any	**135**	ParentCONNECTxp Data Process Server	TCP
PowerSchool SMS system support users	Any	**1433**	ParentCONNECTxp Data Process Server	TCP
PowerSchool SMS system support users	Any	**1434**	ParentCONNECTxp Data Process Server	UDP
ParentCONNECTxp Web/Application (Display) Server	Any	**1433**	ParentCONNECTxp Database Server	TCP
ParentCONNECTxp Web/Application (Display) Server	Any	**1434**	ParentCONNECTxp Database Server	UDP

Source	Source port	Destination port	Destination	Protocol
ParentCONNECTxp Data Process Server	Any	**1433**	ParentCONNECTxp Database Server	TCP
ParentCONNECTxp Data Process Server	Any	**1434**	ParentCONNECTxp Database Server	UDP
ParentCONNECTxp Data Process Server	Any	**135**	ParentCONNECTxp Database Server	TCP
PowerSchool SMS Database Server	Any	**135**	ParentCONNECTxp Database Server	TCP
PowerSchool SMS system support users	Any	**1433**	ParentCONNECTxp Database Server	TCP
PowerSchool SMS system support users	Any	**1434**	ParentCONNECTxp Database Server	UDP

Network port configuration with network filtering

On a system using ParentCONNECTxp, where that system employs any type of network filtering between hosts such as software firewalls, we recommend that the administrator review and consider opening the MSDTC ports to have ParentCONNECTxp work with PowerSchool SMS when configured according to the ParentCONNECTxp documentation (*ParentConnectxp 4.0 Course Request System Reference Manual)*.

MSDTC uses the static port 135 as well as dynamic ports through Remote Procedure Call (RPC) dynamic port allocation, which instructs the RPC program to use a particular random port above 1024. Dynamic port ranges can be as follows:

* For Windows 2008: 49152 to 65535

For example, where the ParentCONNECTxp Data Process Server stands alone, use port 135 and dynamic ports for:

* PowerSchool SMS Database Server to ParentCONNECTxp Data Process Server
* ParentCONNECTxp Data Process Server to PowerSchool SMS Database Server
* ParentCONNECTxp Data Process Server to ParentCONNECTxp Database Server
* ParentCONNECTxp Database Server to ParentCONNECTxp Data Process Server

Where the ParentCONNECTxp Data Process Server resides on the same server as the ParentCONNECTxp Database Server, use port 135 and dynamic ports for:

* PowerSchool SMS Database Server to ParentCONNECTxp Data Process Server

- ParentCONNECTxp Data Process Server to PowerSchool SMS Database Server

Changing the PowerSchool SMS eDocs location

A system user has access to comprehensive PowerSchool SMS documentation (named *PowerSchool SMS eDocs*) through the Help menu on any page [see p.1]. The user's web browser displays the eDocs, which are hosted on https://support.powerschool.com. Here, we constantly updates the PowerSchool SMS eDocs with the latest information. If system users do not have access to the support site, the system administrator can redirect the Help menu to a local, server-based copy of the *PowerSchool SMS eDocs*. The administrator must make this change on each system server each time PowerSchool SMS is installed or upgraded.

To redirect PowerSchool SMS to a local copy of eDocs:

1 Using a text editor, open the file "Inetpub\wwwroot\PowerSchoolSMS\web.config".
2 Locate the section "eDoc connection".
3 In this section, locate the line that begins with `<add key="eDocURLValue" value=`.
4 In this line, change the value to "http://<your server name>/PowerSchoolSMS/Help".
   - For example, `<add key="eDocURLValue" value="http:/- /Grandedistrictserver.com/PowerSchoolSMS/Help"`.
5 Save the web.config file.
6 From the Windows **Start** menu, click **Run**. The Run dialog appears.
7 For **Open**, type "regedit" and click **OK**. The Registry Editor window opens.
8 Expand "HKEY_LOCAL_MACHINE\SOFTWARE\Chancery Software Ltd.\Open District\Web Client\".
9 In the right pane, double-click "eDocURL" and change the path for Value data to "http://<your server name>/PowerSchoolSMS/Help/<version number>".
   - `<version number>` is the number of the PowerSchool SMS version currently installed; for example, "730" or "731".
10 Click **OK**.
11 Close the Registry Editor.

Adjusting the student search results limit

When working with a large set of student search results, by default PowerSchool SMS enables the user to select no more than 1000 records at a time. A District Administrator can adjust this limit up (which, in general, has the effect of decreasing the response speed of the system) or down. The administrator must make this change on each system server.

To adjust the maximum number of student records the user

can select in a set of search results:

1 Using a text editor, open the file "Inetpub\wwwroot\PowerSchoolSMS\web.config".
2 Locate the section "maxRecords".
3 In this section, locate the line "<student search maxRecords ="1000"/>".
4 In this line, change "1000" to the desired number of records.
5 Save the web.config file.

Year end

Typically several months before the school year ends, District and School Administrators begin setting up their PowerSchool SMS system to move current year student and system information over to the next school year. Extensive planning and preparation by both the District Administrator and School Administrators takes place—tasks collectively known as *next-year preparation* (*NYP*) [p. 435].

As the school year comes to an end, School Administrators prepare the information in their Active and Planning Calendars [p. 169] so that the District Administrator can initiate Year-End Processing [p. 450]. Year-End Processing converts the Planning Calendars to Active Calendars and stores the information that was in the previous year's Active Calendars in the Historical database. After Year-End Processing is complete, administrators take care of several follow-up tasks [p. 469].

The complete year-end sequence of tasks is as follows:

- *Next-year preparation* **[p. 435]**

District Administrator	School Administrator(s)
1. *Configure student enrollment settings* [p. 435]	
2. *Ensure that students will be assigned to the appropriate school* [p. 442]	
3. *Override a student's year-end transfer mapping* [p. 445]	
4. *Create and configure the district Planning Calendar* [p. 445]	
	5. *Define the school's Planning Calendar* [p. 446]
	6. *Adjust student enrollment* [p. 450]
	7. *Select a planning schedule [secondary school]* [p. 450]

- *Year-End Processing* **[p. 450]**

District Administrator	School Administrator(s)
	1. *Preparing for Year-End Processing [school]* [p. 450]
	2. *Declare YEP preparation complete* [p. 454]
3. *Preparing for Year-End Processing [district]* [p. 455]	
4. *Running PowerSchool SMS Year-End Processing* [p. 459]	
5. *Post-processing tasks* [p. 468]	

- *Year-end follow-up* **[p. 469]**

District Administrator	School Administrator(s)
	1. *GPA adjustments after Year-End Processing* [p. 470]
2. *Resynchronize SIF after Year-End Processing* [p. 470]	
3. *Connecting to the Historical Database* [p. 470]	

Note: On a system converted to *Permanent Record*, some of the navigation described in this section may differ from a standard system (that is, non-Permanent Record). For help with these differences, refer to the *PowerSchool SMS Permanent RecordGuide*.

Next-year preparation

It is the responsibility of the District Administrator and the School Administrators at each school in the district to confirm that student enrollment settings are suitably configured, and the necessary information is ready. This next-year preparation (NYP) involves the following tasks:

- *Configure student enrollment settings* [p. 435]
- *Ensure that students will be assigned to the appropriate school* [p. 442]
- *Override a student's year-end transfer mapping* [p. 445]
- *Create and configure the district Planning Calendar* [p. 445]
- *Define the school's Planning Calendar* [p. 446]
- *Adjust student enrollment* [p. 450]
- *Select a planning schedule [secondary school]* [p. 450]

Configure student enrollment settings

It is the District Administrator's responsibility to confirm that system-wide student enrollment settings are suitably configured. This involves the following tasks:

- *Confirm student enrollment settings* [p. 436]
- *Verify year-end transfer maps* [p. 438]
- *Confirm custom field processing options* [p. 438]
- *Confirm the elementary permanent record setup* [p. 439]
- *Configure student enrollment in a program's sessions* [p. 439]

Table 67: **Permissions pertaining to setting up the YEP method**

To	You need this permission	Set to	Details
Set projected grade levels	**District > Grade Levels**	Edit	[p. 648]

To	You need this permission	Set to	Details
Set district-wide preferences	**District > General Preferences**	Edit	[p. 645]
Set up the Geocode setup list	**District > Setup Lists**	Merge	[p. 740]
Define Geocode Maps	**District > Geocode Maps**	Edit	[p. 648]
Define projected school Maps	**District > Projected School Maps**	Edit	[p. 653]
Set cTools options	**District > General Preferences**	Edit	[p. 645]
Set up the elementary permanent record	**Transcript/Permanent Record > Elementary Permanent Record Setup**	Delete	[p. 801]

Confirm student enrollment settings

Before the District Administrator creates the district Planning Calendar [p. 445] for the upcoming school year, several system-wide settings need to be set in the district's Active Calendar. These settings include:

- *District graduation grade level* [p. 436]
- *Projected grade levels* [p. 436]
- *Enrollment status code change rules* [p. 437]

District graduation grade level

A grade level from which a student is expected to graduate from the district (that is, the student completes and leaves the district's school system) is a *district graduation grade level*. A District Administrator specifies the district graduation grade level for the system, along with the graduation month [p. 267], and determines what happens at Year-End Processing [p. 450] to a student in that grade level. When PowerSchool SMS transfers a student out of the district graduation grade level, it records on that student's historical transcript pages (refer to the 📄 *Grading Setup Guide)* that he or she has "graduated".

To set the projected grade level for graduating students, refer to *Student enrollment setup* [p. 267].

Projected grade levels

When the District Administrator creates the district Planning Calendar [p. 445],PowerSchool SMS automatically transfers each student from his or her current grade level (providing that the student has completed all requirements) to the next or *projected grade level*. Then, during Year-End Processing, the Planning Calendar is converted to the Active Calendar and students are in the appropriate grade levels for the start of new school year.

Typically, the projected grade level is the next grade [*Figure 171*]; for example, Grade 7 students are transferred to Grade 8, Grade 8 students to Grade 9, and so on. However, there are some grade levels for which the projected grade level is not obvious and requires special consideration; for example, pre-kindergarten or a grade level from which students are expected to graduate [p. 436].

A **Description**: The grade level from which PowerSchool SMS
transfers students during Year-End Processing.

B **Projected Grade**: The grade level to which PowerSchool SMS
transfers the students during Year-End Processing. **Note**:
You can select the same projected grade for more than one
grade level.

To verify projected grade levels [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup
page appears.
2 Under **District**, click Projected Grade Level…. The Projected
Grade Levels popup page appears [*Figure 171*].
3 For each grade level, confirm the **Projected Grade**.
4 Click **Save**.

Enrollment status code change rules

A student's enrollment status code indicates his or her enrollment status [p.
72]. A District Administrator specifies what Withdrawal and Entry/Re-entry
status codes to apply to a student when that student transfers to another
school, graduates, or returns to the same school. The actual date on which
PowerSchool SMS records a change, in either the district Planning Calendar
or the school Planning Calendar [p. 172], is based on the settings selected by
the District Administrator.

For a *returning student* (that is, a student who returns to the same school in
the next school year), PowerSchool SMS by default does not change the
student's status code. However, a District Administrator can have
PowerSchool SMS apply withdrawal and re-entry status codes during Year-End
Processing [p. 450]. Status codes created for a returning student are based

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[1]You can do this if your role is District Administrator.

on the school calendar's start and end dates. **Note**: The school calendar's start date must be later than the district calendar's start date.

To specify status codes rules for Year-End Processing [DA[1]]:

1 In the **Admin** menu, click **District Setup**.
2 On the District Setup page, under Preferences, click **Registration and Enrollment**. The Registration/Enrollment Preferences page appears.
3 Enter or change Information, which includes:
   - **Define status code dates transferring and graduating students will receive**: Options are:
     - **Set Enrollment date**: The date on which PowerSchool SMS applies the enrollment status code. Select **District planning calendar start date** or **School planning calendar start date**.
     - **Set Withdrawal date**: The date on which PowerSchool SMS applies the Withdrawal status code. Select **District active calendar end date +1 day** or **School active calendar end date +1 day**.
   - **Student transferring to other schools receive these codes (all schools)**: Select a **Withdrawal** code and an **Entry/Re-entry** code, for example, "Moved" and "Transferred Enrollment".
   - **Students graduating from district receive this code (all schools)**: Select a **Withdrawal** code, for example, "Graduated".
   - **Students returning to the same school**: The default choice is **Don't create withdrawal and re-enrollment records for returning students**. If you select **Create withdrawal and re-enrollment records for returning student using the following status codes**, you must select a **Withdrawal** code and an **Entry/Re-entry** code.
4 Click **Save**.

Verify year-end transfer maps

For each student who has completed a grade level, PowerSchool SMS determines the school into which the student is to be transferred based on the district's year-end transfer method [p. 152]. The default method uses the Projected School Map [p. 151], while an alternative method (on a system that employs Address Validation), uses the Geocode Map [p. 153]. The District Administrator should review and confirm these maps prior to running Year-End Processing [p. 450].

Confirm custom field processing options

During Year-End Processing [p. 450], PowerSchool SMS processes the information stored in fields in the system to the Planning Calendar so that this information is ready for use in the coming year. For each *custom field* in the system (that is, a field added to the system using cTools) settings in cTools determine how PowerSchool SMS handles the information in that particular field. Refer to *Customizing a system* [p. 472].

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[1]You can do this if your role is District Administrator.

Confirm the elementary permanent record setup

During Year-End Processing [p. 450], PowerSchool SMS creates a permanent record for each elementary school student. This permanent record includes a report card shell. The District Administrator specifies the information that PowerSchool SMS stores in that shell, specifically the reporting periods, types of grades, and attendance figures. Note: If a student is enrolled in two different schools within the district, two separate records are created for the same year. Note: An elementary student's permanent record information is saved but cannot currently be viewed in PowerSchool SMS.

To configure the elementary permanent record [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Preferences**, click <u>Permanent Record</u>. The Permanent Record Preferences page appears.
   - If your system is converted to Permanent Record, click the Elementary tab.
3 Set the information to be included in the elementary report cards, which include:
   - **All report card period grades** or **Final report card period grades**
   - **Skills** and **Measures** for **Subjects**, **Elements**, and **Sections**
   - **Include overall comments**
   - **Daily attendance**
4 Click **OK**.

Configure student enrollment in a program's sessions

During Year-End Processing [p. 450] on a system that employs program management [p. 88], PowerSchool SMS ends all program sessions at the end of the school year (a program session cannot cross calendar years). For each active program session, PowerSchool SMS creates a new program session in the Planning Calendar. The District Administrator configures if and how students who were enrolled in the active program session are enrolled in the new session.

To configure student enrollment in a program's sessions [DA[2]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Program Management**, click <u>Program Setup</u>. The Program Setup page appears.
3 Under **Search Results**, in the **Program** column, click the program's name.
4 In the control bar, click **Sessions/Locations**. The Sessions/Locations page appears.
5 In the **Program Session** column, select a session.

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[1]You can do this if your role is District Administrator.
[2]You can do this if your role is District Administrator.

6 In the **Actions** menu, click **Set Planning Calendar Option**. The Set Planning Calendar Options popup page opens.
- If the session ends before the end of the year, a message appears to that effect and you cannot set options.

7 Select a **Planning Calendar Option**. Options include:
- "Create session/roll students as participants": PowerSchool SMS creates a new session in the Planning Calendar and enrolls in the new session the active session participants. see also *Option: Create session and roll students as participants* [p. 440]
- "Create session/roll students as applicants": PowerSchool SMS creates a new session in the Planning Calendar and for each active session participant creates an application for the new program. see also *Option: Create session and roll students as applicants* [p. 441]
- "Create session/do not roll students": PowerSchool SMS creates a new session in the Planning Calendar. see also *Option: Create session and do not roll students* [p. 442]
- "Do not create session/students are withdrawn": PowerSchool SMS removes active session participants from the program.

8 Set other options, which include:
- **Roll existing applicants**: When this option is set, for each applicant for a program session, PowerSchool SMS creates an application for the new program session. This option is available only if either "Create session/roll students as participants" or "Create session/roll students as applicants" is selected for the Planning Calendar Option. Where PowerSchool SMS rolls participants as applicants, it creates two queues: "Participants rolled as applicants" and "applicants". PowerSchool SMS copies the students from both queues to the new session's applicant queue and clears their eligibility status.
- **Planning calendar "Requested School" controlled by Program Management**: Applies only on a system where school enrollment is controlled by the program. When this option is set, PowerSchool SMS prevents users from changing a student's requested school. Instead, a student's requested school is the school associated with the program. This setting has no effect on a student who is in a graduating grade (that is, a user can change the requested school). This setting is not relevant to a program that allows general entry into a school, that is, the program has no eligibility criteria or capacity limits.

9 Click **OK**.
- PowerSchool SMS applies the Planning Calendar Option settings the first time the Update_Next_Year_Students nightly process is run (during which PowerSchool SMS adjusts enrollment records based on changes to student status made during the day). During subsequent nightly processes, PowerSchool SMS does not update existing sessions.

Option: Create session and roll students as participants

When this option is set, during the Update_Next_Year_Students nightly process, PowerSchool SMS creates a new session in the Planning Calendar and enrolls in the new session the active session participants. PowerSchool SMS also clears the student's calculated eligibility status. Exceptions include:

- A program participant in the graduating grade level for the school. PowerSchool SMS does not enroll this student in the school nor in the new program session.
- At a school that employs controlled enrollment, for each active session participant PowerSchool SMS creates an application for the new program session. The student's calculated eligibility status is cleared. The student must re-enroll in the school before they can be enrolled in the program.

Where the program controls enrollment at the school and district approval is required for out-of-zone enrollments and an approved address exception record is not entered in the Planning Calendar for this enrollment, PowerSchool SMS withdraws the student from the school and enrolls the student in the his or her zoned school see *Specifying a student's school of enrollment for the next year* [p. 157].

Where the program controls enrollment at the school and the district approves an address exception for an out-of-zone enrollment and that approved address exception record is recorded in the Planning Calendar for this enrollment, the student must apply to and be accepted into a controlled-enrollment program at the school. Then a School Administrator must enroll the student [p. 146].

Where the program does not control enrollment at the school and the student is enrolled in another program that controls enrollment at that school in the Planning Calendar, PowerSchool SMS creates a participant record for this program in the Planning Calendar. PowerSchool SMS keeps the student enrolled in the school and sets his or her grade level normally.

Where the program does not control enrollment at the school and the student is not enrolled in another program that controls enrollment at that school, PowerSchool SMS withdraws the student from the school and enrolls the student in his or her Zoned School.

Option: Create session and roll students as applicants

With this option set, PowerSchool SMS creates a new session in the Planning Calendar and for each active session participant creates an application for the new program.

Where the school controls enrollment and the student is not enrolled in another program that controls enrollment at that school, PowerSchool SMS withdraws the student from the school and enrolls the student in his or her zoned school. PowerSchool SMS also creates a program application record for the student, resets queue and eligibility status, and clears rank, rank weight, and preference settings.

Where the school does not control enrollment or the student is enrolled in another program that controls enrollment at that school, PowerSchool SMS keeps the student enrolled in his or her school. PowerSchool SMS also creates a program application record for the student, resets queue and eligibility status, and clears rank, rank weight, and preference settings.

Where the school does not control enrollment or the student is enrolled in another program that controls enrollment at that school and district approval

is required for out-of-zone enrollments and an approved address exception record is not entered in the Planning Calendar for this enrollment, PowerSchool SMS withdraws the student from the school and enrolls the student in his or her zoned school. PowerSchool SMS also creates a program application record for the student, resets queue and eligibility status, and clears rank, rank weight, and preference settings. When the district approves the address exception, the next time the Update_Next_Year_ Students nightly process runs, PowerSchool SMS withdraws the student from the zoned school and enrolls the student in his or her original school.

Option: Create session and do not roll students

PowerSchool SMS creates a new session in the Planning Calendar.

Where the school controls enrollment and the student is not enrolled in another program that controls enrollment at that school, PowerSchool SMS withdraws the student from the school and enrolls the student in his or her zoned school.

Where the school does not control enrollment or the student is enrolled in another program that controls enrollment at that school, PowerSchool SMS keeps the student enrolled in his or her school.

Where the school does not control enrollment or the student is enrolled in another program that controls enrollment at that school and district approval is required for out-of-zone enrollments and an approved address exception record is not entered in the Planning Calendar for this enrollment, PowerSchool SMS withdraws the student from the school and enrolls the student in his or her zoned school. When the district approves the address exception, the next time the Update_Next_Year_Students nightly process runs, PowerSchool SMS withdraws the student from the zoned school and enrolls the student in his or her original school.

Ensure that students will be assigned to the appropriate school

As part of next-year preparation, the administrator must ensure that all students whom PowerSchool SMS should transfer to another school at year end are set to do so and that PowerSchool SMS will assign each student to the appropriate school. This involves the following tasks:

- *Ensure that all students are assigned a home school* [p. 443]
- *Ensure students are assigned a geocode [Geocode Map method only]* [p. 447]
- *Ensure that grade points are set for the school [secondary schools]* [p. 444]

Note: Since a District Administrator can complete most of these tasks for all students in the district, or a School Administrator at each school can complete the tasks for that school's students, we recommend that the district assign responsibility for these tasks.

Table 68: **Permissions pertaining to working with student information**

To	You need this permission	Set to	Details
Assign values to students	**Students > Assign values**	Yes	[p. 768]
Enroll students in a school	**Students > Enroll Student in School**	Yes	[p. 768]
Change a student's home school	**Students > Modify Home School**	Yes	[p. 781]

Ensure that all students are assigned a home school

Ensure that every student is assigned a home school. This is because during Year-End Processing [p. 450]PowerSchool SMS only moves cumulative GPAs to the historical transcript pages of secondary school students who have a home school.

Note: Only a District Administrator or a School Administrator at the home school can assign the home school to a student.

To identify students who do not have a home school assigned [SA, DA[1]]:

1 Using the advanced student search [p. 40], create a search using the following criteria:
   - Field: "Home School (Active)"
   - Operator: "Equals"
   - Value: "N/A"
2 Click **Search**. PowerSchool SMS displays a list of students who do not have a home school assigned.
3 For each student, assign a home school [p. 443].
   - Or print the list of students for future reference (in the **Actions** menu, click **Print**).

To assign a student a home school [SA, DA[2]]:

1 View the student's record. The Student Demographics page appears.
2 On the **Overview** tab, under **Student Summary**, for **Home School (Active)** select a school.
   - Your role might restrict you to selecting your own school or "N/A".
3 Click **OK**.

To assign a home school to one or more students [SA, DA[3]]:

1 Select one or more students in a list of students.
   - For example, in a list of Student Search results [p. 40].
2 In the **Actions** menu, click **Assign > Values**. The Assign Values popup page appears.
3 For **Assign Field**, select "Home School (Active)".
4 For **New Value**, select the home school to assign.

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[1]You can do this if your role is School Administrator or District Administrator.
[2]You can do this if your role is School Administrator or District Administrator.
[3]You can do this if your role is School Administrator or District Administrator.

- Your role might restrict you to selecting your own school or "N/A".

5 Click **Add to List**.

6 Click **OK**. A dialog appears asking you to confirm the changes.

7 Click **OK**. A dialog appears that confirms that PowerSchool SMS has made the changes.

8 Click **OK**. PowerSchool SMS assigns the home school to the selected students.
- If PowerSchool SMS fails to assign the home school to one or more of the selected students, it saves a list of the those students. You can view this list on the Quick Search page [p. 39].

Ensure that grade points are set for the school [secondary schools]

The School Administrator should ensure that grade points are set for the letter grade, numeric, and graphic symbol grading tables in use at the secondary school (refer to the 📕 *Grading Setup Guide*). This is because during Year-End Processing [p. 450]PowerSchool SMS creates historical records for each student. To successfully create historical records for secondary students, each grade assigned to the student must have an associated grade point.

To ensure that grade points are set for the secondary school's grading tables [SA[1]]:

1 In the **Admin** menu, click **Grading**.

2 Under **Step 2**, click **Grading Tables**. The Grading Table page appears.

3 Under **Grading Table Name**, click a grading table. The Edit Grading Table page appears.

4 Under **Numeric Grading Table**, view the **Grades** and associated **Grade Points** [*Figure 172*].

5 Click **OK**.
- To change or enter a grade point, select the grade and enter the new grade point in the table.

Figure 172: Changing a grade point

Level: **Reg** ADV HON

Copy

Selected: 0   Total:9

	*Lower Cutoff	*Letter Grade	Grade Points	*Graphic Symbol	P/F	% Credit	*Description in Legend
☐	95	A+	4.5		P	100	Super
☐	90	A	4		P	100	Excellent
☐	87	A-	3.7		P	100	not quite excellent
☐	85	B+	3.5		P	100	Very very good
☐	80	B	3		P ▾	100	Very Good
☐	70	C+	2.667		P / F	100	Goodie
☐	50	C	2		P	100	Good
☐	40	D	1		P	50	50% credit 40 - 59.9
☐	0	E	0		F	0	Failure

[1]You can do this if your role is School Administrator.

Override a student's year-end transfer mapping

During Year-End Processing [p. 450], PowerSchool SMS automatically transfers each student who has graduated from a school to another school by referring to the district's year-end transfer mapping [p. 438]. In special circumstances, a District or School Administrator can override this mapping for a particular student see *Specifying a student's school of enrollment for the next year* [p. 157].

Create and configure the district Planning Calendar

Since a school's Planning Calendar [p. 172] is derived from that of the district, a District Administrator must define the Planning Calendar for the next year before each school can begin work. To create the district Planning Calendar, refer to *District calendar setup* [p. 252].

Defining the district Planning Calendar involves the following steps:

- *Adjust staff scheduling parameters* [p. 445]
- Adjust the course catalog [see *Ensure that the school course catalog is ready*, p. 289]
- Make the district course catalog available to schools [see *Set up a schedule structure*, p. 356].
- *Ensure that the school course catalog is ready* [p. 289]
- *Update the Geocode Map* [p. 446]

Table 69: **Permissions pertaining to district Planning Calendar creation**

To	You need this permission	Set to	Details
Define the district Planning Calendar	**District > Define District Calendar**	Yes	[p. 645]

Create a role specifically to work with next-year data

To enable select system users to work with next-year information, we recommend that the District Administrator create a role specifically designed for this purpose see *Managing roles* [p. 242]; for example, a role named "School Admin Next Year". The permissions for this role should include setting **Change Planning Schedule** to **Yes**.

We also recommend that the District Administrator assign this role to only one or two system users who are responsible for scheduling the next year [p. 245].

Adjust staff scheduling parameters

Staff scheduling parameters include:

- A teacher's full-time teaching load expressed as a number of hours per day. The default load is 5 hours. In each school's Planning Calendar, PowerSchool SMS assigns this teaching load to each staff member. A School Administrator can adjust a teacher's load individually. PowerSchool SMS uses this figure to compare a

teacher's actual teaching load to the full-time equivalent and thus determine if a teacher is overloaded or not (each course in the course catalog has a load value) [see p.310]

- The maximum number of students each teacher can have across all classes [p. 310]. By default, no maximum is set.

When a District Administrator creates a Planning Calendar, PowerSchool SMS copies the staff scheduling parameters from the Active Calendar. Thus the District Administrator need only adjust the parameters if necessary to prepare for the next year.

To adjust staff scheduling parameters for the next year [DA[1]]:

1   In the Planning Calendar, In the **Admin** menu, click **District Setup**. The District Setup page appears.
2   Under **District**, click Next Year Preparation. The Next Year Preparation page appears.
3   Under **Step 1**, click Staff Scheduling Defaults. The Staff Scheduling Defaults page appears.
4   Set options, which include:
    - **Full-time teaching load**: Type a number of hours per day.
    - **Student cap:**
        - **No student maximum per teacher**
        - **Maximum students per teacher**: Type a number.
5   Click **OK**.

Update the Geocode Map

On a system that employs the Geocode Map [p. 153] for address validation and for its year-end transfer method [p. 438], the District Administrator should ensure that the Geocode Map is up to date. Circumstances that demand an update to the Geocode Map include the following:

- The district changes a school boundary.
- The district changes feeder-school policies.
- The district closes a school.
- The district opens a school.

Define the school's Planning Calendar

A school's Planning Calendar [p. 172] is the foundation of Next-Year Preparation. A School Administrator derives a school's Planning Calendar from that of the district, thus the District Administrator must first define the district's Planning Calendar [p. 445]. To create the school Planning Calendar, refer to *School calendar setup* [p. 169].

Defining a school's Planning Calendar involves the following tasks:

- *Create a school Planning Calendar* [p. 448]
- *Confirm the scheduling method* [p. 448]
- *Define attendance reporting periods* [p. 449]
- *Define calendar day exceptions* [p. 449]

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[1]You can do this if your role is District Administrator.

- *Adjust day types* [p. 449]
- *Adjust homerooms* [p. 449]
- *Adjust grade levels in use* [p. 449]
- *Adjust buildings and rooms* [p. 449]

Table 70: **Permissions pertaining to school Planning Calendar definition**

To	You need this permission	Set to	Details
Define school Planning Calendars	**School Setup > Define School Calendar**	Yes	[p. 717]
Create user roles	**Users > User Roles**	Delete	[p. 806]
Edit user accounts	**Users > User Accounts**	Delete	[p. 805]
Define calendar day exceptions	**School Setup > Calendar Day Exceptions**	Delete	[p. 709]
Review and modify day types	**School Setup > Day Types Setup List**	Yes	[p. 714]
Update homerooms	**School Setup > Homerooms**	Delete	[p. 722]
Modify grade levels	**School Setup > Grade Level Setup List**	Edit	[p. 720]
Modify buildings	**Facilities Management > Buildings**	Edit	[p. 668]
Modify rooms	**Facilities Management > Rooms**	Edit	[p. 668]
Create and change planning schedules (secondary schools only)	**School Setup > Change Planning Schedule**	Yes	[p. 710]

Ensure students are assigned a geocode [Geocode Map method only]

On a system that employs the Geocode Map [p. 152] as its year-end transfer method, the administrator should ensure that every student is assigned a geocode. This enables PowerSchool SMS to transfer each student to the appropriate school. **Note**: On a system that employs Address Validation, PowerSchool SMS assigns geocodes automatically—the administrator cannot assign geocodes. Refer to the *Address Validation Guide*.

To identify students who do not have a geocode assigned [SA, DA[1]]:

1 Using a detailed student search page [p. 40], create a search using the following criteria:
   - Field: "Geocode (Planning)"
   - Operator: "Equals"
   - Value: "N/A"
2 Click **Search**. PowerSchool SMS displays a list of students who do not have a geocode assigned.
3 For each student, assign a geocode [p. 448].
   - Or print the list of students for future reference (in the **Actions** menu, click **Print**).

---

[1]You can do this if your role is School Administrator or District Administrator.

To assign a student a geocode [SA, DA[1]]:

1 View the student's record. The Student Demographics page
   appears.
2 On the **Address/Phone** tab, under **Addresses**, under
   Geocodes, for **Planning Calendar**, select a geocode.
3 Click **OK**.

To assign a geocode to one or more students [SA, DA[2]]:

1 Select one or more students in a list of students.
   - For example, in a list of Student Search results [p. 40].
2 In the **Actions** menu, click **Assign > Values**. The Assign Values
   popup page appears.
3 For **Assign Field**, select "Geocode (Planning)".
4 For **New Value**, select the geocode to assign.
5 Click **Add to List**.
6 Click **OK**. A dialog appears asking you to confirm the changes.
7 Click **OK**. A dialog appears that confirms that PowerSchool SMS
   has made the changes.
8 Click **OK**. PowerSchool SMS assigns the geocode to the selected
   students.
   - If PowerSchool SMS fails to assign the geocode to one or more of the
     selected students, it saves a list of the those students. You can view
     this list on the Quick Search page [p. 39].

Create a school Planning Calendar

A School Administrator creates the school's Planning Calendar [p. 172] based
on that of the district. To create a school's Planning Calendar, refer to
School Planning Calendar setup [p. 174].

Confirm the scheduling method

Two general scheduling methods are available: Elementary and Secondary
[p. 280]. Typically, a school uses the same scheduling method each year and
thus there is no need to change it when creating a school's Planning
Calendar. If, however, a change in the scheduling method [p. 280] is
needed, the School Administrator should consider the following:

- A school that employs elementary scheduling for the Active
  Calendar can change to secondary scheduling in the Planning
  Calendar.

  When the School Administrator makes this change, subjects currently
  assigned to the school in the Planning Calendar are unassigned and
  secondary classes cannot be scheduled until the District Administrator
  assigns courses to the school.

- A school that employs secondary scheduling for the Active Calendar
  cannot change to elementary scheduling in the Planning Calendar.

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[1]You can do this if your role is School Administrator or District Administrator.
[2]You can do this if your role is School Administrator or District Administrator.

Define attendance reporting periods

The School Administrator needs to define the Planning Calendar's attendance reporting periods [p. 185]. By default, the Planning Calendar has a single reporting period that spans that calendar's entire date range. (PowerSchool SMS does not copy the Active Calendar's reporting periods to the Planning Calendar since attendance reporting periods are closely tied to specific days of the year.).

Define calendar day exceptions

The School Administrator needs to define the Planning Calendar's exception days [p. 178]. By default, the Planning Calendar has no exception days. (PowerSchool SMS does not copy the Active Calendar's exception days to the Planning Calendar since these days are closely tied to specific days of the year.)

Adjust day types

The School Administrator needs to adjust the Planning Calendar's day types [p. 176]. While PowerSchool SMS copies the Active Calendar's day types to the Planning Calendar, the coming year may require changes or additions. These changes do not affect the Active Calendar's day types.

Note: During Year-End Processing [p. 450], when calculating Days Possible for a student in a multi-track environment, PowerSchool SMS does not include days of the type *off-track*. An off-track day is a day for which system users cannot take attendance.

Adjust homerooms

The School Administrator needs to adjust the Planning Calendar's homerooms [p. 202]. While PowerSchool SMS copies the Active Calendar's homerooms to the Planning Calendar, the coming year may require changes or additions. These changes do not affect the Active Calendar's homerooms.

Adjust grade levels in use

The School Administrator selects grade levels from those set up by the District Administrator [p. 199].) Any changes the District Administrator makes to the grade levels used in the Planning Calendar also affect the Active Calendar.

Adjust buildings and rooms

The School Administrator might need to adjust the buildings and rooms that are available to be used in the Planning Calendar [p. 172] [p. 255]. Any changes the School Administrator makes to the buildings and rooms also affect the Active Calendar.

Adjust student enrollment

With the Planning Calendar in place [p. 172], the School Administrator can enroll students in the school [p. 141] for the next year. Since the date of enrollment determines whether the student is active in the current school year or will be active in the next school year, the School Administrator can enroll a student at any time in either the Planning or Active Calendar.

The School Administrator can also review the projected enrollment of any student [p. 151] and adjust it as necessary. To identify where PowerSchool SMS will enroll a student during next-year processing, refer to the **Planning District Calendar** panel of the **Personal Info** tab of the student's Demographics record [p. 60].

Select a planning schedule [secondary school]

Where a secondary school has more than one planning schedule [p. 303], the School Administrator must specify the planning schedule that is to be the active schedule for the upcoming school year.

Year-End Processing

During Year-End Processing, PowerSchool SMS stores the information in the district and schools' Active Calendars in a Historical Database and then converts district and schools' Planning Calendar information into Active Calendar information. To close off the school year, School and District Administrators must update student information and system properties in preparation for running Year-End Processing [p. 459] by performing the following tasks:

- *Preparing for Year-End Processing [school]* [p. 450]
- *Preparing for Year-End Processing [district]* [p. 455]

Preparing for Year-End Processing [school]

Before the District Administrator can run Year-End Processing [p. 450], School Administrators must ensure the data for their schools is suitably configured in their Active Calendars. This involves the following tasks:

- *Update student information* [p. 450]
- *Declare YEP preparation complete* [p. 454]

Update student information

Just prior to Year-End Processing [p. 450] is an opportune moment for the School Administrator to update the information for each of the school's students. Indeed some changes are critical to this process, such as promotion or retention. The complete list of tasks is as follows:

- *Set the students' promotion status* [p. 451]
- *Calculate grades, credits, and GPAs [secondary school]* [p. 453]
- *Calculate honor roll [secondary school]* [p. 453]
- *Calculate class rank [secondary school]* [p. 454]

- *Calculate daily attendance codes* [p. 454]
- *Run reports* [p. 454]

To	You need this permission	Set to	Details
Assign values to multiple students	**Students > Assign Values**	Yes	[p. 768]
Promote and graduate students	**District > Promote and Graduate Pending Students**	Yes	[p. 654]
Calculate grades	**Grading > Run Grade, Credit & GPA Calculations**	Yes	[p. 679]
Override calculated grades	**Grading > Override Calculated Grades**	Yes	[p. 676]
Calculated credits	**Grading > Run Grade, Credit & GPA Calculations**	Yes	[p. 679]
Override calculated credits	**Grading > Override/Recalculate Earned Credits**	Yes	[p. 678]
Calculated class ranks	**Grading > Run Class Ranks**	Yes	[p. 679]
Override calculated class ranks	**Grading > Override Student Ranks**	Yes	[p. 677]
Calculated daily attendance	**Attendance > Daily Attendance**	Yes	[p. 627]
Override calculated daily attendance values	**Attendance > Daily Attendance Override**	Yes	[p. 628]
Run reports	**Reporting > <Report>**	Yes	[p. 696]

Set the students' promotion status

In preparation for Year-End Processing [p. 450], the School Administrator must set the *promotion status* of the district's students. This enables PowerSchool SMS to, during Year-End Processing, adjust each student's enrollment appropriately according to circumstances. A student's promotion status can be one of the following:

- **Promoted**: During Year-End Processing, PowerSchool SMS promotes this student to the next grade, graduates the student from the school (and likely transfers the student to another), or graduates the student from the district.
- **Retained**: During Year-End Processing, PowerSchool SMS keeps this student in the same grade. In some cases, PowerSchool SMS transfers the student to the same grade in another school.

Setting students' promotion status involves two steps:

1 *Adjusting the promotion status of particular students* [p. 451].
2 *Running the Student Graduation and Promotion process* [p. 452].

Adjusting the promotion status of particular students

Prior to the School Administrator running the Student Graduation and Promotion process [p. 452], a student's promotion status can be either of the following:

- **Pending**: This is the default status for every student. When the School Administrator runs the Student Graduation and Promotion process [p. 452], PowerSchool SMS converts this status to "Promoted".
- **Retained**: If necessary, the School Administrator can change a student's promotion status to "Retained". When the School Administrator runs the Student Graduation and Promotion process [p. 452], PowerSchool SMS keeps this status as "Retained". This status is school-specific; if a student is enrolled in more than one school, that student can have a different promotion status at each school.

For a student whose promotion status can't be determined until after Year-End Processing *Year-End Processing* [p. 450] (such as a student taking a make-up course in summer school), the School Administrator can adjust that student's enrollment in the next year's Active Calendar.

To set a student's promotion status to "Retained" [SA[1]]:

1 In the Active Calendar, locate and view the student's record [p. 37].
- Or, on the Year-End Processing page, click **Retain Students**.
2 On the Student Demographics page [p. 56], click the **School Specific** tab.
3 For **Student promotion status**, select "Retained".
4 Click **OK**.

To set the promotion status of more than one student: [SA[2]]

1 In the Active Calendar, locate and view the students' records [p. 37].
- Or, on the Year-End Processing page, click **Retain Students**.
2 On the Student Search page, select the students.
3 In the **Actions** menu, click **Assign > Values**. The Assign Values dialog appears.
4 For **Assign Field**, select "Student promotion status".
5 For **New Value**, select "Retained".
6 Click **Add to List**. The "Retained" statement appears in **Fields to Assign**.
7 Click **OK**.
- If, for some reason, PowerSchool SMS is unable to assign the value to a student, PowerSchool SMS lists that student in a saved list [p. 46].

Running the Student Graduation and Promotion process

To ensure that PowerSchool SMS makes the appropriate adjustments to student enrollment during Year-End Processing [p. 450], the School Administrator has PowerSchool SMS run a process that sets each student's promotion status. In this process, PowerSchool SMS does the following:

- For a student whose promotion status is "Pending", changes the status to "Promoted".

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[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.

- For a student in the school graduation grade at his or her active school whose promotion status is "Pending", changes that status to "Promoted" at all schools in which the student is enrolled, changes the "has graduated" status to "Y", and sets the student's graduation year to the current year.
- For a student in the school graduation grade at a school that is not his or her active school whose promotion status is "Pending", changes that status to "Promoted", changes the "has graduated" status to "Y", and sets the student's graduation year to the current year.
- For a student whose promotion status is "Retained", keeps that status as "Retained".

To run the Student Graduation and Promotion process [SA[1]]:

1 In the Active Calendar, in the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Year-End Processing**, click <u>Year-End Processing</u>. The Year-End Processing page appears.
3 Under **Step 2**, click <u>Promote and Graduate Students…</u>. The Student Promotion and Graduation popup page appears [*Figure 173*].
4 Click **Run**. PowerSchool SMS processes all students at the school and in the **Status** column indicates that the process is "Completed".

Figure 173 Student Promotion and Graduation dialog

A **Status**: "Completed" indicates that an administrator has run this process.

Calculate honor roll [secondary school]

To ensure that PowerSchool SMS transfers historical information to the students' transcripts correctly during Year-End Processing [p. 450], the School Administrator at a secondary school must ensure that the school's honor roll is up-to-date in the Active Calendar. For detailed information on honor rolls, refer to the *Grading Setup Guide*.

Calculate grades, credits, and GPAs [secondary school]

To ensure that PowerSchool SMS transfers historical information to students' transcripts correctly during Year-End Processing [p. 450], the School

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[1]You can do this if your role is School Administrator.

Administrator at a secondary school must ensure that every student's calculated grades, credits, and GPAs (both weighted and unweighted) are up-to-date in the Active Calendar. For detailed information on working with grading calculations, refer to the 📕 *Grading Setup Guide*.

Calculate class rank [secondary school]

To ensure that PowerSchool SMS transfers historical information to the students' historical transcript pages accurately during Year-End Processing [p. 450], the School Administrator at a secondary school must ensure that the school's class ranks are up to date in the Active Calendar. The calculation is based on students' cumulative GPAs for the year. If the district has set up GPA/class rank reporting terms, the administrator can calculate class ranks for each term (for further information, refer to the *Setting up GPA/Class Rank Reporting Terms Technical Bulletin*). Cumulative and term-based calculations are stored separately; one does not override the other. For detailed information on class ranks, refer to the 📕 *Grading Setup Guide*.

Calculate daily attendance codes

To ensure that PowerSchool SMS transfers historical information to the students' transcripts accurately during Year-End Processing [p. 450], the School Administrator must ensure that all students' daily attendance codes [p. 159] are up to date in the Active Calendar. This is because during Year-End Processing PowerSchool SMS deletes attendance calculation rules [p. 189], which are based on periods and class schedules that may not be relevant in the next school year. To calculate students' daily attendance codes, refer to *Calculating daily attendance codes* [p. 159].

Run reports

Prior to Year-End Processing [p. 450], we recommend that the School Administrator run reports [p. 115] on information that is not copied from the Planning Calendar to the Active Calendar [p. 172], which includes attendance reports and report cards.

Declare YEP preparation complete

For the District Administrator to initiate Year-End Processing [p. 450], he or she needs to know that every school has completed the necessary preparations. The School Administrator declares to the District Administrator that a school's preparations for Year-End Processing are complete by filling out a checklist.

To fill out the Year-End Processing checklist [SA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Year-End Processing**, click <u>Year-End Processing</u>. The Year-End Processing page appears.

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[1]You can do this if your role is School Administrator.

- The Year-End Processing checklist for a secondary school is longer than that of an elementary school.

3 Under **Step 3**, select the tasks that are complete. These tasks might include:
- **Grade calculations** [p. 453] [secondary schools]
- **Credit calculations** [p. 453] [secondary schools]
- **Cumulative GPA calculations (weighted/unweighted)** [p. 453] [secondary schools]
- **Current year GPA calculations** [p. 453] [secondary schools]
- **Class rank calculations** [p. 454] [secondary schools]
- **Attendance calculations** [p. 454]
- **Honor roll calculations** [p. 453] [secondary schools]
- **Reports** [p. 454]

4 Under **Step 4**, verify that **Status** of any additional Year-End Processing requirements is "OK". Such requirements might include:
- "Student promotion and graduation" [p. 204]
- "Planning calendar is required" [p. 172]
- "Planning schedule must be selected" [p. 450]

5 Click **OK**.

Preparing for Year-End Processing [district]

The District Administrator must make final preparations to run Year-End Processing [p. 450]. This involves two crucial tasks:

- *Create a shell to hold the Historical Database* [p. 455]
- *Review Year-End Processing pre-check* [p. 455]

Create a shell to hold the Historical Database

During Year-End Processing [p. 450], PowerSchool SMS copies the data in the Active Database and uses it to create a Historical Database. In preparation, the District Administrator must create a shell to hold the Historical Database see *Creating a Historical Database shell* [p. 381].

Review Year-End Processing pre-check

PowerSchool SMS enables the District Administrator to ensure that all schools are prepared for Year-End Processing [p. 450] and that there are no outstanding conditions that would prevent the successful completion of that process. The District Administrator cannot run Year-End Processing until any errors identified by PowerSchool SMS [p. 457] are corrected. If a school is not prepared, however, the District Administrator can override its unprepared status [p. 458] (in some cases) and proceed with Year-End Processing.

To review the Year-End Processing Pre-Check [DA[1]]:

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[1]You can do this if your role is District Administrator.

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Year-End Processing**, click <u>Year-End Processing</u>. The Year-End Processing page appears.
3 Under **Step 4**, click <u>Year-End Processing....</u> The Year-End Processing Pre-Check page appears.
4 In **Year-End Processing Pre-Check** panel [*Figure 174*], ensure that all schools are ready for Year-End Processing.
5 In the **District Level Checklist** panel [*Figure 175*], ensure that there are no outstanding **Errors** or **Warnings** [p. 457].
   - PowerSchool SMS compiles its list of Errors and Warnings when it runs the Update_Next_Year_Students nightly process. To refresh the list, execute the following script in Query Analyzer (or SQL Server Management Studio if you are running SQL Server 2005 or 2008):

```
--EXEC QUEUE_UPDATE_NEXT_YEAR_STUDENTS
SELECT STATUS,* FROM CSL_SS_TASK (NOLOCK)
--SELECT * FROM CSL_SS_TASK_MANAGER
```

6 In the **District Level Checklist** panel [*Figure 175*], ensure that setup is complete, including, as required, the following:
   - <u>Elementary Report Cards Permanent Record Setup</u>: By default, PowerSchool SMS does not copy report card records to the Elementary Permanent Record.
   - <u>Customization Builder Field Properties</u>: By default, PowerSchool SMS copies all cTools data to the Active Calendar. To prevent the copying of a cTools field, the administrator can set options on the Add/Edit Field page for the cTools field see *Confirm custom field processing options* [p. 438].
   - <u>Project Enrolled Students</u>: Enables the administrator to view a report of enrolled students who do not have a projected school [p. 151].

Figure 174: **Year-End Processing Pre-Check page, Pre-Check panel**
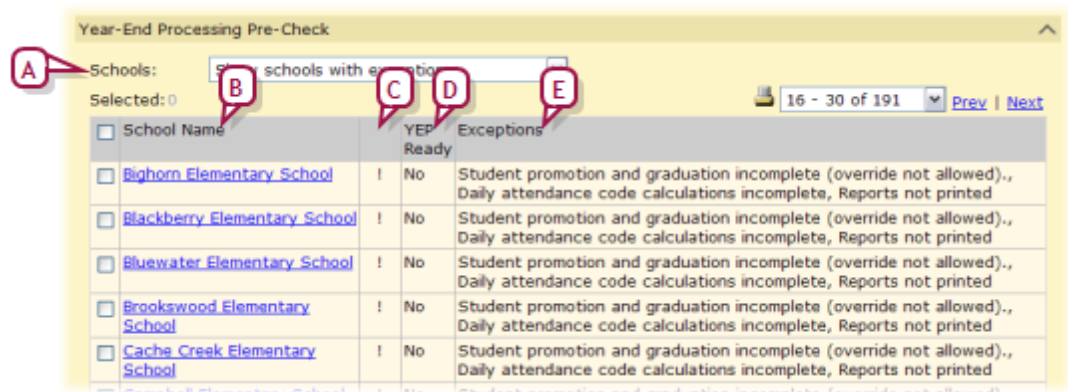
A **Schools**: Enables the administrator to display all schools or only those not ready for year-end processing.
B **School Name**: The name of the school. Click the name to view the school's details. Schools are grouped as Elementary Schools and Secondary Schools.
C Override column: Indicates that the District Administrator has overridden a YEP Ready status of "No". A "~" indicates an

override. A "!" indicates that the YEP Ready status cannot be overridden because it has exceptions that prevent Year-End Processing from being run. Refer to *Overriding a school's YEP Ready status* [p. 458].

D **YEP Ready**: Indicates if the school is prepared for Year-End Processing. In some cases, the District Administrator can override a "No".

E **Exceptions**: Where a school is not prepared for Year-End Processing, lists the outstanding issues.

Figure 175: Year-End Processing Pre-Check page, District-Level Checklist panel
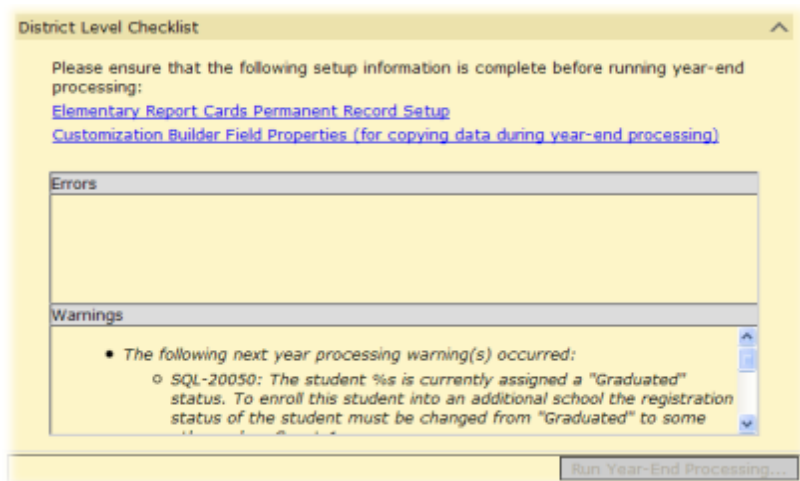
A **Errors**: Lists problems that would prevent PowerSchool SMS from running Year-End Processing. see also *Pre-check errors and warnings* [p. 457]. If an error is listed, the **Run Year-End Processing...** button is disabled.

B **Warnings**: Lists problems that would affect the outcome of Year-End Processing. PowerSchool SMS lists warnings after it has run the Update_Next_Year_Students nightly process. see also *Pre-check errors and warnings* [p. 457]

C **Run Year-End Processing...**: Initiates Year-End Processing. This button is disabled if any Errors are listed on the page.

Pre-check errors and warnings

On the Year-End Processing Pre-Check page [*Figure 175*], potential Errors and Warnings that PowerSchool SMS might display includes the following SQL messages (SQL Server execution messages that are not recognized are reported as errors).

- SQL-20011: Status Codes can only be added to a school that the student is enrolled in.
- ROLLBACK: [The entire exception is logged.]
- SQL-20020: Cannot add status code. Code conflicts with a withdrawal code on the same date.
- SQL-20046: School data is currently being replicated.
- SQL-20009: School data is currently being purged.

- SQL-20047: Withdrawal Status Date must be later than the date of the initial entry code for the student.
- SQL-20012: Status Date must be the same or later than the initial entry code for the student.
- SQL-20010: Invalid Status Code - will cause student to be actively enrolled in multiple schools.
- SQL-20016: Cannot delete the initial entry code for a student.
- SQL-20052: The student can only be active in a single school while the General Preference is set to one school at a time.
- SQL-20014: Cannot enroll the student into a school in which that student is already enrolled.
- SQL-20017: Student can only be enrolled with an Entry or Reentry status code.
- SQL-20044: The student is currently assigned a "Not Registered" status. You must complete the registration for the student before the student can be enrolled into a school.
- SQL-20050: The student is currently assigned a "Graduated" status. To enroll this student into an additional school the registration status of the student must be changed from "Graduated" to some other value.
- SQL-20035: Student cannot be enrolled. Student is already enrolled into the maximum number of allowable schools.
- SQL-20037: Student is too young to be enrolled into a school.
- SQL-200: [The entire exception is logged.]

Overriding a school's YEP Ready status

On the Year-End Processing Pre-Check page [*Figure 174*], PowerSchool SMS identifies schools that are not prepared for Year-End Processing (that is, the school's YEP Ready status is "No"). PowerSchool SMS lists the reasons for a school's status in the Exceptions column.

The District Administrator can override the unprepared status of a school if the Exception is one of the following:

- No calculated grades
- No credit calculations
- No cumulative GPA
- No current-year GPA
- No class rank
- Daily attendance code calculations incomplete
- No honor rolls
- Reports not printed

The District Administrator cannot override the unprepared status of a school if the Exception is one of the following:

- The promotion and graduation process is not complete [p. 451].
- A school has not created a planning calendar [p. 172].
- A secondary school has not selected a planning schedule [p. 450].

To override a school's YEP Ready status [DA[1]]:

1   On the Year-End Processing Pre-Check page [*Figure 174*], in the **Year-End Processing Pre-Check** panel, select the school.
2   In the **Actions** menu, click **Override**. PowerSchool SMS displays a "~" in the Override column.
    - To remove the override, select the school and in the **Actions** menu click **Reset**.

Running PowerSchool SMS Year-End Processing

When the District Administrator starts Year-End Processing [p. 450], PowerSchool SMS runs a series of pre-programmed tasks which include large-scale changes to the information stored in the system. The District Administrator cannot stop this process nor undo the results once the process is complete. Caution: Before running Year-End Processing, ensure that all nightly processes are complete and up-to-date. If a user makes a change to information that PowerSchool SMS has not subjected to the nightly process, the change could adversely affect Year-End Processing; for example, a change to a student behavior record or period attendance values can result in an incorrect attendance calculation.

The District Administrator has two options as to how to run Year-End Processing:

- **Run Year-End Processing as a single process**: PowerSchool SMS runs the process until elementary and secondary historical records are created and final processing is complete. If PowerSchool SMS fails to complete the process, the District Administrator can restore the database from the backup created beforehand.
- **Suspend Year-End Processing**: PowerSchool SMS runs the process but pauses after it creates the elementary historical record and again after creating the secondary historical record. These pauses enable the administrator to back up data. To enable PowerSchool SMS to continue, click **Continue Processing**. If PowerSchool SMS fails to complete a stage of the process, the District Administrator can restore the database from the last backup and carry on from that point. For detailed information, refer to the *PowerSchool SMS Manual Year-End Processing* Technical Bulletin.

If Year-End Processing fails, the District Administrator can restore the database from the last backup.

When PowerSchool SMS commences Year-End Processing, it begins by doing the following:

- Locks down the system against changes by users. Only system users who have permission to run Year-End Processing (typically, District Administrators) can sign in. Signed in users can only view the Year-End Processing Event Log page.

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[1]You can do this if your role is District Administrator.

- Completes any tasks in progress in the Task Manager, disables scheduled tasks, and deletes any one-off tasks (such as scheduled, non-recurring reports).
- Backs up the active database. To back up the database, PowerSchool SMS uses the same process as any SQL Server backup to a remote shared folder. Before actually starting Year-End Processing, PowerSchool SMS asks the administrator to identify a folder in which to store the backup.
- Copies the active database to the Historical Database shell [p. 455].
- Runs the Update_Next_Year_Students nightly process, which adjusts enrollment records based on changes to student status made during the day that Year-End Processing is run.

During Year-End Processing, PowerSchool SMS adjusts the information in the database to support the conversion of the Planning Calendar to the Active Calendar. Refer to *Information adjustment during Year-End Processing* [p. 462].

When PowerSchool SMS has completed adjusting the information stored in the system [p. 462] and nears completion of Year-End Processing it does the following as its final tasks:

- Converts the Active Calendar to the Historical Calendar.
- Converts the Planning Calendar to the Active Calendar.
- Enables any disabled scheduled tasks.
- Unlocks the system against changes by system users.

Table 72: **Permissions pertaining to performing Year-End Processing**

To	You need this permission	Set to	Details
Delete schools	**School Specific Pages > Delete Schools**	Yes	[p. 734]
Run Year-End Processing	**District > Perform Year-End Processing**	Yes	[p. 633]

To run Year-End Processing [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Year-End Processing**, click **Year-End Processing**. The Year-End Processing page appears.
3 Under **Step 4**, click **Year-End Processing...**. The Year-End Processing Pre-Check page appears [*Figure 175*].
4 Click **Run Year-End Processing...**.
- This button is not available if there are any Errors outstanding [p. 457].
5 A warning appears. Click **OK**. The Database Back-up Information dialog appears.
6 Set options:

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[1]You can do this if your role is District Administrator.

- **Shared network folder**: The location of the backup database.
  Caution: Ensure the Properties for the folder have been set to share and that Permissions have been set to Full Control, Change, and Read.
- **Back-up file name**: The name of the backup database.
- **Username**: The system administrator's user name that gives access to the database.
- **Password**: The password for the Username.

7 Click **OK**. The Year-End Processing Backup Option page appears.

8 Select one of the following options:
- **Run Year-End Processing as a single process** [p. 459]
- **Suspend Year-End Processing** [p. 459]

9 Click **OK**. PowerSchool SMS runs the process.
- The District Administrator can monitor PowerSchool SMS's progress through its Year-End Processing tasks [p. 461].
- If PowerSchool SMS fails to complete a stage of the process, it stops processing. The District Administrator can identify the task that PowerSchool SMS failed to complete and attempt to repair it before having PowerSchool SMS resume the process [p. 461].

Monitoring the progress of Year-End Processing

When PowerSchool SMS Year-End Processing is running, the District Administrator can monitor its progress through its tasks. PowerSchool SMS displays these tasks in a Year-End Processing Event Log (which is the only part of the system a user can view when PowerSchool SMS locks down the system for Year-End Processing). If PowerSchool SMS fails to complete a task (and thus stops Year-End Processing), the District Administrator can unlock the system, fix the problem, and have PowerSchool SMS continue.

The tasks PowerSchool SMS displays in the Year-End Processing Event Log include the following:

- Lock down PowerSchool SMS login
- Lock down Task Manager
- Validate Year-End Processing
- Backup active database
- Create historical database
- Create elementary historical records
- Create secondary historical records
- Update secondary permanent records (for PowerSchool SMS systems converted to Permanent Record)
- Update next-year students
- Preserve active data
- Delete active calendar data before data move to planning calendar: During this event, custom data is deleted from the active calendar before being moved to the planning calendar.
- Move active calendar data to planning calendar: During this event, custom data is moved from the active calendar to the planning calendar.

- Delete active calendar data after data move to planning calendar: During this event custom data is deleted from the active calendar after being moved to the planning calendar.
- Rollover calendars
- Create secondary subject assignments
- Apply day patterns
- Unlock Task Manager
- Unlock PowerSchool SMS login
- Year-End Processing successfully completed

To view the Year-End Processing log:[DA][1]:

1 As soon as the District Administrator clicks **Run Year-End Processing**, the **Year-End Processing Event Log** page appears. Review the tasks listed. Information includes:
   - **Task Description**: Describes the task in which PowerSchool SMS engaged.
   - **Status**: A check mark indicates that PowerSchool SMS completed the task; a "!" (exclamation mark) indicates otherwise.
   - **Start Time**: The time at which PowerSchool SMS began the task.
   - **Duration**: The amount of time it took PowerSchool SMS to complete the task.
   - **Unlock System** [only visible if YEP stops]: Enables the District Administrator to work with the system during a pause in Year-End Processing due to PowerSchool SMS's failure to complete a task. **Note**: If PowerSchool SMS fails to complete a task concerning the backing up of the Active Database or the creation of the Historical Database, then it may be possible for the District Administrator to resolve the problem this way. Otherwise, we recommend that the administrator contact Technical Support [see p.1].

Information adjustment during Year-End Processing

During Year-End Processing [p. 450], PowerSchool SMS adjusts information in the database to support the conversion of the Planning Calendar to the Active Calendar. In general, PowerSchool SMS deletes from the Active Database any information that relates to a specific calendar year, such as a student's attendance codes and grades. This makes way for new information. (Before PowerSchool SMS deletes the information, it stores that information in the Historical Database). PowerSchool SMS preserves in the Active Database any information that relates to a student's academic career as a whole, such as demographics, disciplinary data, and transcripts.

PowerSchool SMS's adjustments to information include the following:

- Attendance [p. 76]: PowerSchool SMS deletes assigned interval attendance codes (twice-daily and period), daily attendance codes, daily override flags, and submission flags. (System users must enter attendance from scratch in the new Active Calendar). PowerSchool SMS copies daily attendance summary data to the historical

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[1]You can do this if your role is District Administrator.

transcript pages (or to the Permanent Record pages for those PowerSchool SMS systems that have been converted to Permanent Record).

- Grades [p. 84]: PowerSchool SMS deletes grades. (Users enter grades from scratch during the new year). PowerSchool SMS copies GPA summary data to the historical transcript pages (or to the Permanent Record pages for those PowerSchool SMS systems that have been converted to Permanent Record).

- Student schedules: PowerSchool SMS deletes student schedules and student course requests and replaces them with those from the Planning Calendar. PowerSchool SMS deletes the schedules of students who are no longer enrolled. [Refer to *Scheduling* [>>]]

- Student change history: PowerSchool SMS deletes change history records that refer to the old Active or earlier calendars. Records that refer to the old Planning Calendar persist.

- Student behavior records [p. 89]: PowerSchool SMS retains these.

- **Date entered 9th grade** [p. 60]: PowerSchool SMS retains this value.

- **Year entered 9th grade** [p. 60]: PowerSchool SMS retains this value.

- Enrollment status [see p.72]:

  If the student's grade level is the same in the Historical and Active Calendars, PowerSchool SMS copies the Active Calendar's enrollment status.

  If the student's grade level differs between the Historical and Active Calendars, and the enrollment status in the Active Calendar is "Promoted", then PowerSchool SMS copies Active Calendar's enrollment status.

  If the student's grade level differs between the Historical and Active Calendars, and the enrollment status in the Active Calendar is "Retained" and the Historical Calendar is "Promoted", then PowerSchool SMS copies nothing.

  If the student's grade level differs between the Historical and Active Calendars, and the enrollment status in the Active Calendar is "Retained" and the Historical Calendar is "Retained", then PowerSchool SMS copies the Active Calendar's grade level and enrollment status.

  If the student's grade level differs between the Historical and Active Calendars, and the enrollment status in the Active Calendar is "Retained" and the Historical Calendar is "Pending", then PowerSchool SMS copies the Active Calendar's grade level and sets enrollment status to "Promoted".

- Geocodes [p. 153]: PowerSchool SMS copies over the geocodes from the Planning Calendar. In a district that employs address validation, PowerSchool SMS runs a stored procedure that updates each student's geocode based on his or her home address.

- Home school [p. 56]: PowerSchool SMS copies the student's Requested School [p. 157]. For graduating or withdrawing students, district-wide preferences set on the General Preferences page determine the Home School.

- Elementary report cards: PowerSchool SMS copies the subjects and subject element skills and measures, including headers, footers, and descriptions to the report card. This takes place only if, in the Planning Calendar for all subjects that can be scheduled in the school, **Can Schedule** is selected [see p.280].
- Elementary permanent record setup: PowerSchool SMS copies items selected on the Elementary Permanent Record Setup page to the same page in the new Active Calendar.
- Courses: PowerSchool SMS copies course information (except grade item properties) from the Planning Calendar to the Active Calendar. (System users enter grade item properties from scratch in the new year.)
- Grading data not common to both elementary and secondary schools: For a school that is changing its scheduling method to secondary scheduling, PowerSchool SMS deletes report card setup and elementary common report card elements.
- Secondary historical record: PowerSchool SMS updates each student's historical record with grades from the Active Calendar and Special Services settings (from the Student Overview page [p. 56]), including "Receives specialized services" and "Section 504 eligible". Where a historical record exists for the same school, year, and grade level, PowerSchool SMS appends the information—no information is overwritten or deleted. For information about historical records, refer to the *PowerSchool SMS Grading Setup Guide*.
- Class rank definitions: PowerSchool SMS deletes these. (System users enter class rank definitions from scratch in the new year.) For information about class rank definitions, refer to the *PowerSchool SMS Grading Setup Guide*.
- Term class ranks: PowerSchool SMS copies these to the historical transcript pages (or to the Permanent Record pages for those systems converted to Permanent Record). For information about term class ranks, refer to the *PowerSchool SMS Grading Setup Guide*.
- Term credits: PowerSchool SMS copies summary values for potential credits by term and credits earned by term to the historical transcript pages (or to the Permanent Record pages for those systems converted to Permanent Record). For information about term credits, refer to the *PowerSchool SMS Grading Setup Guide*.
- Course grading period sets: PowerSchool SMS deletes the assignment of grading period sets to courses. These must be reassigned in the new year. For information about course grading period sets, refer to the *PowerSchool SMS Grading Setup Guide*. The School Administrator can mass assign grading period sets.
- GPA definitions: PowerSchool SMS removes from GPA definitions any courses that are unassigned in the school catalog, set as not collecting grades in the district calendar, or set as being excluded from GPAs in the district calendar. Any definition that is changed during Year-End Processing PowerSchool SMS adds to the audit log at

the district. For information about GPA definitions, refer to the *PowerSchool SMS Grading Setup Guide*.

- District GPA/Class rank reporting terms: PowerSchool SMS copies the district GPA reporting term assignments to report card grading periods in the new Active Calendar. For information about GPA/Class rank reporting terms, refer to the *Setting up GPA/Class Rank Reporting Terms Technical Bulletin*.
- Term GPAs and Cumulative To End of Term GPAs: PowerSchool SMS copies these to the historical transcript pages. After year-end processing, during the Update_Next_Year_Students nightly PowerSchool SMS updates these according the current student information. For information about term GPAs, refer to the *PowerSchool SMS Grading Setup Guide*.
- Honor roll definitions including eligibility rules: PowerSchool SMS copies these to the new Active Calendar. For information about honor roll definitions, refer to the *PowerSchool SMS Grading Setup Guide*.
- Eligible and assigned students: PowerSchool SMS deletes from honor rolls eligible and assigned students, including assignment overrides. For information about honor roll definitions, refer to the *PowerSchool SMS Grading Setup Guide*.
- "Required for honor roll overrides" General Preference: PowerSchool SMS copies to the new Active Calendar the preference setting that determines whether reason codes are required for honor roll overrides. PowerSchool SMS copies existing overrides to the Historical Database along with a text description of the override reason code.
- Student honor roll history [p. 75]: Student honor roll history is stored in the historical tables, although it is currently not available through the historical transcript pages. Honor roll history information stored in the historical tables includes the school name, the year the honor roll was assigned, the honor roll name and description, and the honor roll eligibility criteria.
- Day types [p. 176]: PowerSchool SMS copies these from the Planning Calendar.
- Exception days [p. 178]: PowerSchool SMS copies these from the Planning Calendar.
- Homerooms [p. 202]: PowerSchool SMS copies these from the Planning Calendar.
- Attendance reporting periods [p. 185]: PowerSchool SMS copies the attendance reporting periods from the Planning Calendar.
- Audit Log [p. 163]: PowerSchool SMS starts the log from scratch in the new year.
- Change log (used by SIF): PowerSchool SMS starts the log from scratch in the new year.
- Attendance exception rules [p. 195]: PowerSchool SMS does not delete attendance exception rules.

PowerSchool SMS updates a rule if that rule was calculated with a named grading or attendance reporting period (anything other than the periods listed above), PowerSchool SMS updates the rule to become a user-defined range, with the start and end dates defined based on the original rule. (The purpose of this is to draw attention to the rules that require maintenance.)

PowerSchool SMS does not update a rule if that rule was set up to be calculated within a user-defined range (where the start and end date are determined by the user) or within the following periods: current report card period, previous month, Yr-to-date, current attendance reporting period.

Note: Grading periods do not have explicit start dates. For the first grading period, the start date is set to the first day of school (elementary) or term (secondary). Each other grading period has a start date of the first attendance day after the end of the previous period. We advise vigilance where multiple grading period sets exist since it is possible to have grading periods with the same name but different date ranges.

- Daily attendance code calculation method [p. 189]: PowerSchool SMS copies the method to the new Active Calendar.
- Period daily attendance code rules [p. 189]: PowerSchool SMS deletes daily attendance code rules. (System users must enter the rules for the new year. We recommend keeping a copy of the old rules for reference.)
- Homeroom twice-daily attendance code rules [p. 181]: PowerSchool SMS delete these rules only if the school is changing from twice-daily homeroom attendance to class/period attendance or once-daily attendance.
- Enable near match setting for Sample method [p. 181]: PowerSchool SMS copies this method to the new Active Calendar.
- Term attendance: On a system converted to Permanent Record, PowerSchool SMS copies the following to the historical transcript pages:

Total Present Value

Total Present Occurrence

Total Absent Excused Value

Total Absent Excused Occurrence

Total Absent Unexcused Value

Total Absent Unexcused Occurrence

Total Tardy Excused Value

Total Tardy Excused Occurrence

Total Tardy Unexcused Value

Total Tardy Unexcused Occurrence

Total Days Possible

On a system not converted to Permanent Record, PowerSchool SMS copies either the value or the occurrence — but not both — according to the setting in General Preferences.

- Scheduling groups: PowerSchool SMS copies these from the Planning Calendar.
- Day patterns: PowerSchool SMS copies these from the Planning Calendar.
- Bell schedules: PowerSchool SMS copies these from the Planning Calendar.
- Meeting patterns: PowerSchool SMS copies these from the Planning Calendar.
- Class setup: PowerSchool SMS copies the class setup from the Planning Calendar.
- Course offerings and meeting patterns: PowerSchool SMS copies these from the Planning Calendar.
- Class scheduling options: PowerSchool SMS copies these from the Planning Calendar.
- Resource services: PowerSchool SMS copies these from the Planning Calendar. PowerSchool SMS deletes resource services only if they are associated with a course that is not assigned to the school in the Planning Calendar. Deletion of a resource service is recorded in the audit log.
- Resource roster: PowerSchool SMS does not copy this. It must be built from scratch in the new year.
- Constraints: PowerSchool SMS copies constraint definitions, including eligibility rules and program settings, from the Planning Calendar.
- Scheduling term sets: PowerSchool SMS copies these from the Planning Calendar.
- Teams: PowerSchool SMS copies these from the Planning Calendar.
- Team staff members: PowerSchool SMS copies these from the Planning Calendar.
- Master schedule: PowerSchool SMS copies this from the Planning Calendar.
- Class loading rules: PowerSchool SMS copies these from the Planning Calendar.
- Course request tally data: PowerSchool SMS copies this from the Planning Calendar.
- Teacher allocation data: PowerSchool SMS copies this from the Planning Calendar.
- Student loader options: PowerSchool SMS copies these from the Planning Calendar.
- Scheduling statistics: PowerSchool SMS copies these from the Planning Calendar.
- Course scheduling parameters: PowerSchool SMS copies these from the Planning Calendar.
- Schedule versions: PowerSchool SMS deletes any Planning schedules (and scheduling logs) not selected to be used in the new year [p. 303].
- Reservation labels: PowerSchool SMS copies these from the Planning Calendar.

- Address ranges: PowerSchool SMS copies these from the Planning Calendar.
- Address exceptions: PowerSchool SMS copies exception approval records from the Planning Calendar.
- Geocode Maps [p. 153]: PowerSchool SMS copies these from the Planning Calendar.
- cTools fields [p. 472]: By default, PowerSchool SMS copies all cTools data from the Planning Calendar. To prevent the copying of a cTools field, the administrator can set options on the Add/Edit Field page for the cTools field. For a field on a calendarized schema, PowerSchool SMS copies the information in the field to the Planning Calendar, if the field's "Copy to Planning" option is selected. For a field in a non-calendarized schema, PowerSchool SMS copies the information in the field if the field's "Keep in Active Calendar" option is selected. For information about cTools, refer to *Customizing a system* [p. 472].
- Programs [p. 88]: PowerSchool SMS does not copy program data to the Active Calendar. In general, program management options determine how PowerSchool SMS handles programs at year end.
- Transportation: PowerSchool SMS retains student transportation history.

Post-processing tasks

As soon as PowerSchool SMS completes Year-End Processing [p. 450], the District Administrator and School Administrators should verify and consolidate the changes. This includes the following tasks:

- *Verify each school's Active Calendar* [p. 468]
- *Adjust grading period dates* [p. 468]
- *Double check elementary subject framework and report cards* [p. 469]
- *Back up the database* [p. 469]
- *Auditing the completed process* [p. 469]

Verify each school's Active Calendar

When PowerSchool SMS completes Year-End Processing [p. 450], School Administrators should verify that they can use the (new) Active Calendar [p. 172], by testing aspects of the system such as scheduling [p. 280], and attendance [p. 76].

Adjust grading period dates

When Year-End Processing [p. 450] is complete, School Administrators need to update the grading period start and end dates (refer to the 🗎 *Grading Setup Guide*). *Also, for secondary schools, confirm that all grading periods are correct for individual courses. During Year-End Processing, PowerSchool SMS attempts to copy the grading period set assigned to a course, but may*

not be able to in some cases. Course grade items are available to secondary schools only once the grading period end dates are correct.

Double check elementary subject framework and report cards

When Year-End Processing [p. 450] is complete, elementary School Administrators should check the subject framework and report card setup for errors before allowing teachers to enter grades. For further information, refer to *Scheduling* [p.280] and the 📄 *Grading Setup Guide*.

Back up the database

We highly recommend making a backup copy of the PowerSchool SMS system's database [>>]. You can set up PowerSchool SMS to back up the database automatically at regular intervals, such as nightly six days a week, or make the backup manually at any time. While making a database backup, we recommend also backing up the historical database.

Auditing the completed process

During Year-End Processing [p. 450], PowerSchool SMS records some of its activity in the system's Audit Log. We recommend that the District Administrator scan activity related to Year-End Processing for anomalies that might require corrective action see *Reviewing information-changing activity* [p. 163]. We recommend that the administrator pay particular attention to the following:

* Attendance exception rules [p. 195]: Check the start and end dates.
* Resource services: Check for deleted resource services that need to be re-created.
* GPA definitions: Check for courses that need to be added to the definitions.

Year-end follow-up

After PowerSchool SMS has completed Year-End Processing [p. 450] and changes have been verified, [p. 450], the District Administrator and School Administrators need to complete the following tasks:

* *GPA adjustments after Year-End Processing* [p. 470]
* *Resynchronize SIF after Year-End Processing* [p. 470]
* *Connecting to the Historical Database* [p. 470]

Table 73: **Permission pertaining to year-end follow-up**

To	You need this permission	Set to	Details
View audit logs	**School Setup > View Audit Log**	Yes	[p. 731]
Update grading period end dates	**School Setup > Grading Period Sets**	Delete	[p. 720]
Verify the subject framework and course catalog	**School Setup > Subject Framework/Course Catalog**	Delete	[p. 729]

GPA adjustments after Year-End Processing

The School Administrator must manually update any secondary student's summary cumulative GPA (on the historical transcript pages) where:

- An administrator enters a grade for that student after Year-End Processing [p. 450], such as for a summer school course.
- An administrator changes a grade or credit on that student's historical record.

Resynchronize SIF after Year-End Processing

For any system running the Schools Interoperability Framework (SIF), the District Administrator must re synchronize the data after Year-End Processing [p. 450].

Connecting to the Historical Database

After Year-End Processing [p. 450], the PowerSchool SMS system works with the Active Database. It has stored the old Active Database as the Historical Database in the location specified by the District Administrator in an earlier step see *Create a shell to hold the Historical Database* [p. 455]. To enable administrators to adjust historical information and run reports [p. 115] on the Historical Database, the District Administrator must set up PowerSchool SMS to connect to the Historical Database.

To set up access to a Historical Database [DA[1]]:

1 On a server other than the server on which the current Active Database is installed, install the PowerSchool SMS Database Server [p. 403].
2 Add a new active database [p. 411].
3 Replace the new Active Database with the Historical Database created during Year-End Processing.
4 On any server, install the PowerSchool SMS Web Server [p. 413].
5 Point the web server to the Database Server where you installed the historical database.

It is possible to have the Historical and Active databases running on the same server. However, we do not recommend this setup because any work with the Historical Database (such as reporting, data mapping, or access by large numbers of users) can diminish the performance of the Active Database. Indeed, we recommend that when the Historical Database is not being used the District Administrator stop Replication and Task Manager services.

To set up access to a Historical Database on the same server as the Active Database: [DA[2]]

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[1]You can do this if your role is District Administrator.
[2]You can do this if your role is District Administrator.

1 Add a new active database [p. 411].
2 Replace the new Active Database with the Historical Database created during Year-End Processing.
3 Install the PowerSchool SMS Web Server [p. 413].
   - Ensure that the web server covers all server roles.
4 Set up the Task Manager on one of the other Web or Application Servers to run Database Server tasks.
   - Change the affinity to 8.

Customizing a system

PowerSchool SMS*cTools* enables the District Administrator, technical analyst, or developer to customize a PowerSchool SMS system to meet the unique needs of a school district and to meet state reporting requirements. The administrator can add to the structure of an PowerSchool SMS system and create new custom pages that capture unique district and school setup information, as well as information about staff, programs, academic plans, demographics, health, and tests.

This chapter contains the following sections:

- *[Customization procedure* p.472]
- *Customizable areas of a PowerSchool SMS system* [p. 474]
- *Using setup lists to facilitate data entry* [p. 477]
- *Working with schemas* [p. 489]
- *Working with custom pages, panels, and fields* [p. 505]
- *Controlling access to custom schema and pages* [p. 517]
- *Sharing customizations* [p. 523]

Customization procedure

Customizing a PowerSchool SMS system involves the following steps (in strict order):

1 Planning the customization [p. 473]
2 Determining customization change restrictions [p. 473]
3 Creating and populating custom setup lists and setup list pairs [p. 477]
4 Creating a schema [p. 489]
5 Configuring fields [p. 494]
6 Adding pages, panels, fields, and objects to the schema [p. 505]
7 Packaging and sharing the customization [p. 523]

Caution: Before customizing a system, we recommend the administrator have a thorough understanding of the requirements of the school district and an awareness of the impact that changes will have on the district's system as a whole and on the schools encompassed by it. We also recommend that the administrator be familiar with the structure of the PowerSchool SMS database and understand district-wide and school-specific data requirements. Familiarity with Microsoft SQL Server® is also important.

Table 74: cTools permissions

To	You need this permission	Set to	Details
Create new custom schemas and fields and edit existing custom schemas and fields.	**District > Manage Schema Properties**	Yes	[p. 651]

To	You need this permission	Set to	Details
Add and edit pages, panels, fields, and objects.	**District > Manage UI Properties**	Yes	[p. 651]

Customization best practices

The following suggestions are intended to help the District Administrator create and track customizations so that he or she will know what's in the system, be able to make changes quickly when required, and minimize the impact on system users. We recommend that the administrator:

- Whenever possible, customize a system in a test environment. Using a test environment minimizes disruption to users and facilitates the testing of customizations implementation. When a customization is complete, create a Customization Package [p. 523] and install it in the production environment (that is, where the system is in current use by active users).

- Ensure that naming conventions are transparent. Prefix database field names with a short description of the data area. Keep the prefixes as short and meaningful as possible. Standardize and document the prefixes before beginning the customization process.

- Whenever possible, use *collection* fields and *setup list* fields [p. 500]. These types of fields ensure that users enter standardized data and minimize spelling errors.

- Test and revise the customization several times before making it available to users. Suggested test scenarios include:
  - Testing the custom pages using accounts in different roles.
  - Entering maximum and minimum values and lengths in all fields.
  - Entering data that is out of range. For example, enter numeric values that are greater and less than allowed, and enter more decimal places.
  - Testing validations by leaving required fields blank.

Preventing changes to customizations

To prevent other customizers from making changes to a custom schema [p. 489] the District Administrator can install an *owner key* on his or her computer. The owner key is a file available from Pearson that serves two purposes: to identify the creator of the customized schema and to prevent other customizers from making changes to the creator's schema.

When an administrator installs the owner key, PowerSchool SMS *locks* existing customized schema, preventing changes from being made directly in the schema by anyone but the schema creator; new custom schemas created after an owner key is installed are locked as soon as they are created. Any customizer who is not the creator sees a lock icon beside the custom schema; he or she can extend the schema, but cannot edit it directly or delete it.

The panels and fields on the pages [p. 505] in a locked schema cannot be edited or deleted; however new panels can be added with new fields.

To restrict changes to customizations:

1 Contact a Pearson representative to request an owner key.
Pearson will send a file named "cToolsPackage.key".

2 On the computers on which you will create the customizations, copy the file "cToolsPackage.key" to c:\csl.

If the administrator opts out of using an owner key, PowerSchool SMS uses the district number as a *creator ID* to identify the owner of a customization. We recommend that the administrator update the district number in PowerSchool SMS to a number meaningful to the school district so that the customization can be easily identified.

To update the district number [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.

2 Under **District**, click **Profile**. The District Profile page appears.

3 For **District Number**, enter letters and/or numbers up to a maximum of nine.

4 Click **Save**.

Customizable areas of a PowerSchool SMS system

A *feature area* is a group of schemas [p. 489] and their associated pages, panels, and fields [p. 505] all of which have related capabilities and purpose. PowerSchool SMS provides several feature areas that are customizable.

In some feature areas it is possible for the administrator to add custom pages with panels and fields; in others, panels and fields can only be added to the existing pages built into PowerSchool SMS, as described in [*Table 75*, p.474].

Table 75: **Customizable feature area schemas and fields**

Feature area	Main schema	Navigation to built-in pages	Add custom pages?
Class	Homeroom	School Setup > Homerooms > Add **Homeroom** or **Edit Homeroom**	No
Contact	Person, Student Contact	Demographics > Contacts	No

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[1]You can do this if your role is District Administrator.

Feature area	Main schema	Navigation to built-in pages	Add custom pages?
Course Catalog	DistrictSubjectItem	*See Subject Framework*	No
	SchoolGradedCourse	District Setup > Course Catalog > Courses > **Course Details** > **Course Grading**	
District Setup	DistrictSetup	**District Setup**	Yes
	GradPlan	*See Academic Plan*	No
	TranscriptDefinition	District Setup > **Transcript Options**	
Enrollment	Student School Enrollment Enrollment Status Withdrawal Status	District Setup > Registration and Enrollment	No
Permanent Record (*for PR converted databases only*)	School	District Setup > **Out of District Schools**	No
	StudentPermRecord	Permanent Record > **PR Summary Data**	
	TranscriptDefinition	District Setup > **Transcript Options** **Note:** This schema is in this feature area for permanent record (PR) environments only. For non-PR environments, this schema is in the District Setup feature area	
Program Management	ProgramParticipant	Student Demographics > **Program Profile...**	Yes
	ProgramSchool	School Setup > Program Setup > **Setup School Info**	
	ProgramSession	District Setup > Program Setup > General Info > **Sessions/Locations**	
	ProgramSetup	District Setup > Program Setup > **General Info** >**Contacts, Funding/Costs, Staff**	
Scheduling	Class	Elementary school: Scheduling > Class Setup > Custom > **[Elementary] Edit Class Schedule** Secondary school: Scheduling > Master Schedule > Custom > **[Secondary] Edit Class Schedule**	No
	ClassSchedTeacher	Scheduling > Master Schedule > *teacher hyperlink* > **Edit Teacher/Class Schedule Information**	
	StudentClassAssignment	Student Demographics > Schedule > *Details icon* > **Student Schedule Item Details**	
School Setup	Building	School Setup > Buildings and Rooms > **Building**	Yes
	Class	The pages **Amend Previous Year Class** Details and **Amend Teacher/Class Details** in the Class schema require special permissions and are not within the scope of this document. For information about these pages, contact Technical Support [see p.1].	
	Room	School Setup > Buildings and Rooms > Building > **Room**	
	School	School Info > **School Info Detail**	

Feature area	Main schema	Navigation to built-in pages	Add custom pages?
Staff	StaffDemographic	District Setup > Staff > **Staff Demographics >** *tabs:* **Overview, Address/Phone, Professional Info, Additional Info**	Yes
	StaffDemoSchool	District Setup > Staff > Staff Demographics > Schools > Schools List > School > **Add/Edit Assignment**	
Student Academic Plan (*pages only*)	District Student	Student Demographics > **Academic Plan**	Yes
Student Behavior	BehaviorIncident	Student Behavior >**Add Behavior Incident** or **Edit Behavior Incident** Student Behavior > Edit Behavior Incident > **Additional Incident Details**	No
	BehaviorIncidentActions	Add Behavior Incident or Edit Behavior Incident > **Action**	
	BehaviorIncidentActionStep	Add Behavior Incident or Edit Behavior Incident > Action > **Action Step**	
	Incident Event	Student Behavior > Add Behavior Incident or Edit Behavior Incident **> Add/Edit Event/Concern**	
Student Demographic	Contact	Student Demographics > **Contact List**	Yes
	DistrictStudent	Student Demographics > Registration > **Register in District** Student Demographics > *tabs:* **Overview** > **Personal Info** > **Address Phone** > **Medical Info** > **Federal Info**	
	DoctorsOfficeVisits	Student Demographics > Health Tracking > Health Office > **Office Visits**	
	Family	Student Demographics > Family > **Family Overview**	
	HealthExaminationDetails	Student Demographics > Health Tracking > Examinations > Add Examinations > Exam Category > **Exam Details**	
	HealthHearingScreening	Student Demographics > Health Tracking > Screenings > **Hearing**	
	HealthVisionScreening	Student Demographics > Health Tracking > Screenings > **Vision**	
	SchoolStudent	Student Demographics > *tab:* **School Specific** >	
Student Health Tracking (*pages only*)	District Student **Note:** Cannot extend this schema	Student Demographics > Health Tracking	Yes
	School Student **Note:** Cannot extend this schema	Student Demographics > Health Tracking	

Feature area	Main schema	Navigation to built-in pages	Add custom pages?
Student Historical Data	HistoricalCourse	Student Demographics > Historical > Historical Courses > **Add/ Edit Historical Course**	No
	HistoricalSummary	Student Demographics > Historical > **Edit** >**Edit Graduation Information**	
	HistoricalYear	Student Demographics > Historical > Historical Years > **Add/ Edit Historical Year**	
Subject Framework	DistrictSubjectItem	District Setup > Course Catalog Home > Subject Framework > **Add/ Generic Subject** District Setup > Course Catalog Home > Subject Framework > **Y** > **Edit Subject**	No
Test Management	TMTestDetail	District Setup > Tests >Test > **Add/Edit Test**	Yes
	TMTestSession	District Setup > Tests >Test > Add/Edit Test > **Test Sessions**	

Using setup lists to facilitate data entry

When customizing a PowerSchool SMS system, we recommend that the District Administrator's first step be to create custom *setup lists* and *setup list pairs*.

A *setup list* is a drop-down menu of predefined values used to facilitate the user's data entry and ensure consistent spelling and terminology. For example, when entering an address into PowerSchool SMS, an address setup list enables the user to select a city from the drop-down menu, rather than typing the city name.

A *setup list pair* is a linked pair of drop-down menus of values—made up of a parent and a child—that work together. For example, if a user enters an address where there is a setup list pair consisting of a parent list of states and a child list of cities, selecting a state from the first setup list automatically filters the second setup list to show only those cities that are in the selected state.

Table 76: Setup list permissions

To	You need this permission	Set to	Details
Create, edit, or delete custom setup lists	**District > Custom Setup Lists**	Delete	[p. 641]
Add, edit, or delete items in a custom setup list	**Setup Lists > <Setup List>**	Delete	[p. 740]
Create, edit, or delete setup list groups	**Setup Lists > Setup List Groups**	Delete	[p. 739]
Set the default item for a list and add a setup	**Setup Lists > List Defaults**	Edit	[p.

To	You need this permission	Set to	Details
list to a setup list group			737]
Create or edit custom setup list pairs	**District > Customization Builder**	Yes	[p. 643]
Add, edit, or delete items in a setup list pair	**Setup Lists > <Setup List>**	Delete	[p. 740]

Custom setup lists

Whenever a data entry fields on a custom page uses repeating entries, the District Administrator can create a custom setup list [p. 477] to manage the list of values.

Creating a custom setup list involves:

1 (Optional) Group setup lists under a category [p. 478].
2 Add a setup list [p. 479].
3 Add list items to the setup list [p. 479].
4 Select the item to appear by default whenever the list is used [p. 480].
5 Add the setup list to a group [p. 481].

Creating a setup list group

A *setup list group* categorizes setup lists [p. 477] that are similar. A District Administrator can add a custom setup list to an existing setup list group [see p.480] or create a custom group. An existing setup list group, except a required group (indicated by an asterisk [*]), can be edited and deleted. When a setup list group is deleted, PowerSchool SMS moves any setup lists assigned to that group to the "N/A" group.

Figure 176: Setup list groups
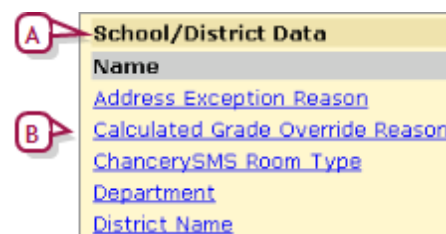
A   Setup list group
B   Setup lists

To add a setup list group [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **cTools**, click **Manage Setup Lists...**. The Custom Setup Lists popup page appears.

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[1]You can do this if your role is District Administrator.

3 In the control bar, click **Setup List Groups**. The Setup List Groups popup page appears.

4 Click **Add**.
- To change a group description, click the group name.
- To delete a group, select it and click **Delete**.

5 On the Add Group popup page, enter a **Description**.

6 Click **OK**. The Setup List Groups popup page appears.
- To return to the Setup Lists popup page, in the control bar, click **Setup Lists**.
- Or, to return to the District Setup page, close the browser window.

Adding a custom setup list

It is possible to add a custom setup list [p. 477] while creating the associated field in cTools; however, the preferred practice is to create the setup lists ahead of time. Creating setup lists first makes it easier to follow naming conventions, which can make managing the setup lists easier.

To add a custom setup list [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.

2 Under **cTools**, click <u>Manage Setup Lists.</u> The Custom Setup Lists popup page appears.

3 Click **Add**.
- To change the description of a custom setup list or to change the group to which it belongs, click the setup list name.
- To delete a custom setup list, select it and click **Delete**.

4 On the Add Custom Setup List popup page, enter or change information, which includes:
- **Table Name**: The name of the setup list in the database. Use only letters and underscores; do not use spaces or punctuation. Once the setup list is created, the table name cannot be changed.
- **Description**: The description of the setup list appears on the Setup Lists page.
- **Setup List Group**: The setup list group [p. 478] to which the setup list belongs.

5 Click **OK**. The Custom Setup Lists popup page appears.

6 Close the browser window.

Working with list items in a custom setup list

A list item is a value the user can choose from the drop-down menu in a setup list field [p. 500]. After creating a custom setup list [p. 477], the District Administrator can add list items immediately or add the list items to the setup list at a later time.

The administrator can change, delete, or merge a setup list's list items. Merging is useful when there are several items with the same meaning;

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[1]You can do this if your role is District Administrator.

rather than deleting one of the items, similar items can be merged together. We recommend merging only two setup items at one time.

To add items to a custom setup list [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click <u>Setup Lists</u>. The Setup Lists popup page appears.
3 Click a setup list name. The List Items popup page appears.
4 Click **Add**.
   • To edit a setup list item, click the item's name.
   • To delete a setup list item, click **Delete**. The Delete List Items popup page appears. Select the item and click **OK**. **Note:** An item can be deleted from a setup list as long as the item is not used in any record in the district database.
5 On the Add List Item popup page, enter or change information, which includes:
   • **Description**: The name of the setup list item, up to 45 characters (except the Program Category setup list, which has a character maximum of 25). The description must be unique.
   • **Short Code**: Enter a code to represent the setup list item, up to 11 characters. The short code must be unique.
   • [Optional] **State Description**: A state description of the setup list item, up to 50 characters.
   • [Optional] **State Short Code**: A state code to represent the setup list item, up to 10 characters.
6 Click **OK**. The List Items popup page appears.
   • To return to the Setup Lists popup page, click **Return**.
   • Or, to return to the District Setup page, close the browser window.

To merge list items:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click <u>Setup Lists</u>. The Setup Lists popup page appears.
3 Click a setup list name. The List Items popup page appears.
4 Click **Merge**. The Merge List Items popup page appears.
5 For **Merge selected items as,** select the description to be assigned to the selected items.
6 Select the other items to merge.
   • **Note**: Do not select the item selected in step 5.
7 Click **OK**.

Specifying a default list item

For each custom setup list [p. 477], the District Administrator can designate one list item as the default selection in the setup list field [p. 500]. This

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[1]You can do this if your role is District Administrator.

default item automatically appears in the field when that field first appears. This facilitates faster data entry by the user.

To set a default list item [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click **Setup Lists**. The Setup Lists popup page appears.
3 Click a setup list.
4 In the control bar, click **List Settings**. The List Settings page appears.
5 For **List Default**, select a list item.
6 Click **Save**.
7 To return to the Setup Lists popup page, click **Return**.
   - Or, to return to the District Setup page, close the browser window.

Grouping setup lists

The District Administrator can manage setup lists better by grouping them [p. 478]. These groups on the Setup Lists popup page

To assign a setup list to a group [DA[2]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click **Setup Lists**. The Setup Lists popup page appears.
3 Click a setup list.
4 In the control bar, click **List Settings**. The List Settings page appears.
5 For **Setup List Group**, select a group.
6 Click **Save**.
7 To return to the Setup Lists popup page, click **Return**.
   - Or, to return to the District Setup page, close the browser window.

Custom setup list pairs

A *setup list pair* is two linked setup lists [p. 477] that work together. A setup list pair consists of a *parent* and a *child* [*Figure 177*]. When a user selects an item from the parent setup list, the child setup list displays only the items for its parent list. For example, when a user enters a health office visit type where there is a setup list pair with a parent list of office visit types (for example, injury or illness) and a child list of diagnoses, if a user selects an office visit type from the first setup list (the parent), the second setup list (the child) shows only those diagnoses that apply to that particular health office visit type.

Each component of a setup list pair has an associated control type [p. 511]. For the parent, the control type is a drop-down list; for the child, the control

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[1]You can do this if your role is District Administrator.
[2]You can do this if your role is District Administrator.

type can be either a drop-down list or a list mover [see also *Setup list pair rules* p.482]. Use a drop-down list when users should select only one value for a given field; use a list mover when users can select one or more values.
Note: To make an existing setup list function as part of a setup list pair, recreate the setup list as a setup list pair [p. 486].

Figure 177: Setup list pair
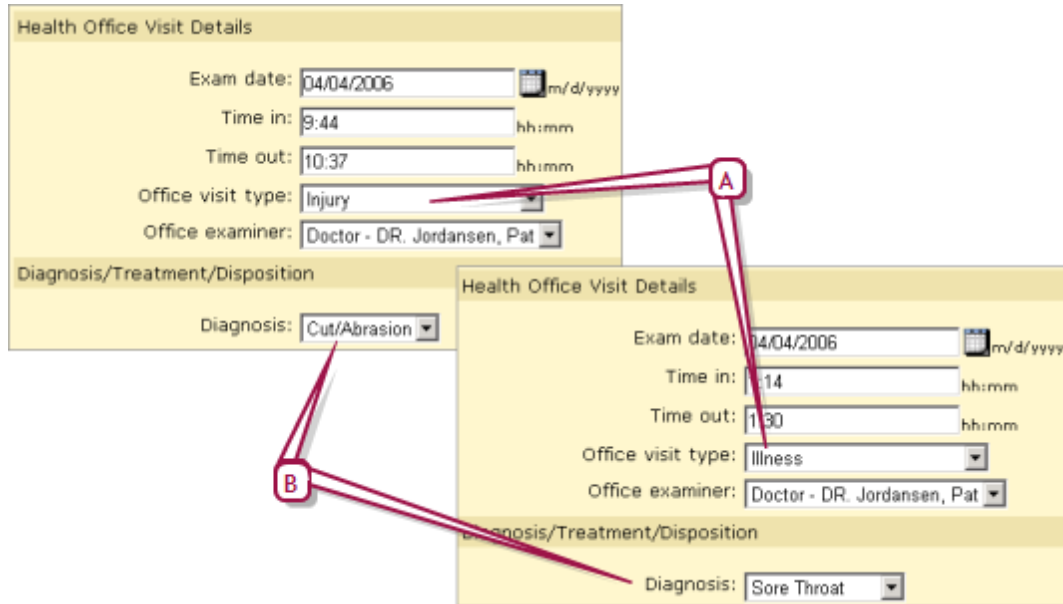
A   Parent setup list.
B   Child setup list.

Setup list pair rules

The District Administrator must consider several rules when creating a setup list pair [p. 481]. Because of these rules, the administrator must build setup list pairs from the most detailed level to the most general level. It is good practice to map out the hierarchy of the setup list pairs before creating them.

The rules are as follows:

1   A setup list *cannot* be a child of a parent more than once. For example, a City setup list can be a child to a State setup list, but cannot be a child to both a State and a County setup list [*Figure 179*] [*Figure 180*].

2   A setup list *can* be a parent to more than one child. For example, a State setup list can be a parent to both the City and County setup lists [*Figure 181*].

3   If a setup list has already been designated as a child in another setup list pair using the list mover control type, it **cannot** be a parent to any other setup list (because a parent must always be a drop-down). For example, for a City and a Suburb setup list, if the City setup list is a child to the State setup list and uses a list mover control type [p. 511], the City setup list cannot be

used as a parent for the Suburb setup list (or for any other setup list) [*Figure 182*].

4   A setup list *can* be a parent if it was previously a child using the drop-down control type. In the City/Suburb example, if the City setup list was a child to the State setup list and used a drop-down rather than a list mover, it could be a parent to the Suburb setup list [*Figure 183*].

5   If a setup list is designated as a parent, it *can* be a child to another setup list. For example, a State setup list can be a child to the Country setup list as well as a parent to the City setup list [*Figure 184*].

Setup list pair rules example

This section describes through a series of illustrations a sample application of the setup list pair rules:

- Figure 178 *: Setup list pair linking State and City.*
- Figure 179 *: Rule 1 - Cannot be a child of a parent more than once in a pair*
- Figure 180 *: Rule 1b: Can be a child of a child*
- Figure 181 *: Rule 2 - Can be a parent to more than one child in a pair*
- Figure 182 *: Rule 3 - Child cannot be a parent if it is a list mover control type*
- Figure 183 *: Rule 4 - A child can be a parent if it is a drop-down control type*
- Figure 184 *: Rule 5 - A parent can be a child to another setup list*

Figure 178: Setup list pair linking State and City

This example is a setup list to link **State** and **City**, where **State** has a control type of drop-down list and **City** has a control type of list mover.

Figure 179: Rule 1 - Cannot be a child of a parent more than once in a pair
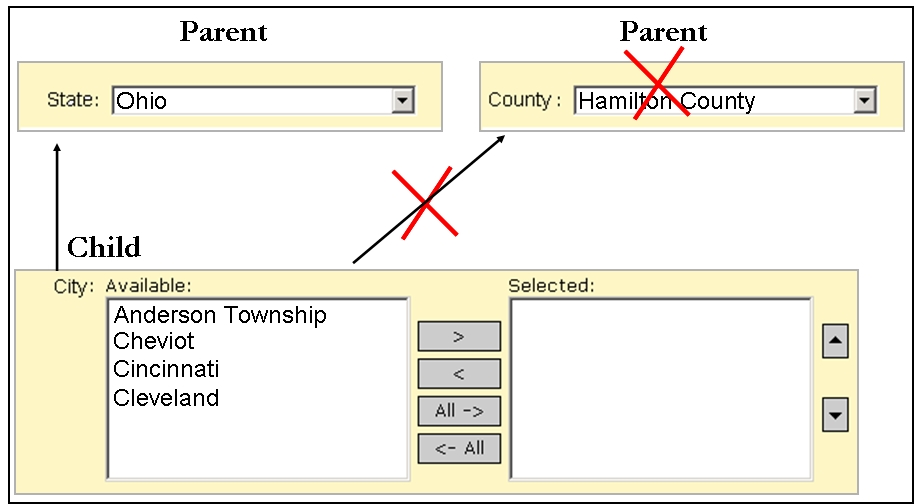
Because **City** is the child in this pair, it cannot be the child in any other setup list pair, for example, it cannot be a child of **County**.

Figure 180: Rule 1b: Can be a child of a child
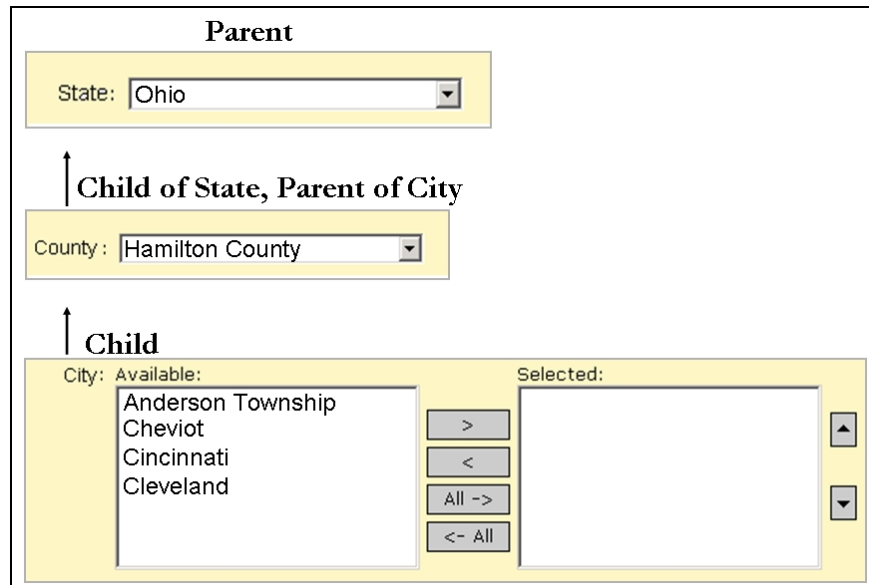
If, however, **County** is a child to **State**, **City** can be a child to **County**, as long as County is a drop-down list and not a list mover.

Figure 181: Rule 2 - Can be a parent to more than one child in a pair
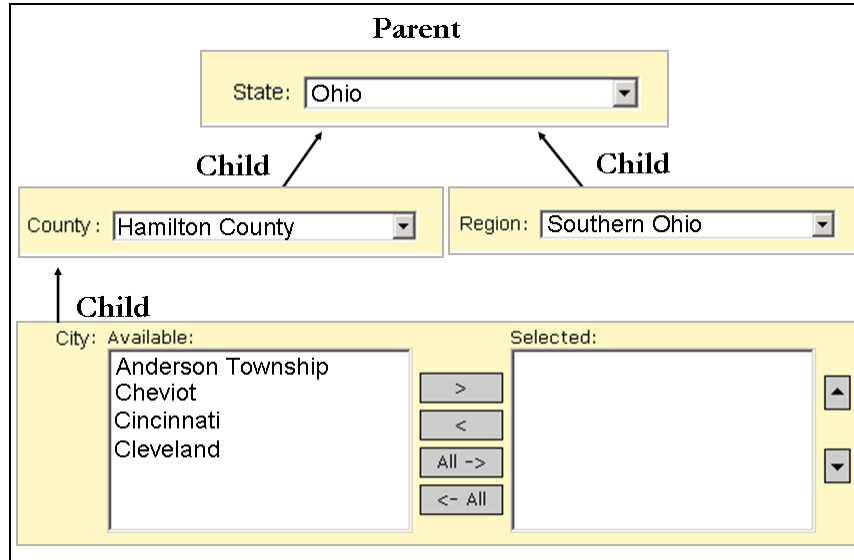
Other child setup lists can be added to the **State** parent setup list, as long as they are not a child of any other setup list.

Figure 182: Rule 3 - Child cannot be a parent if it is a list mover control type
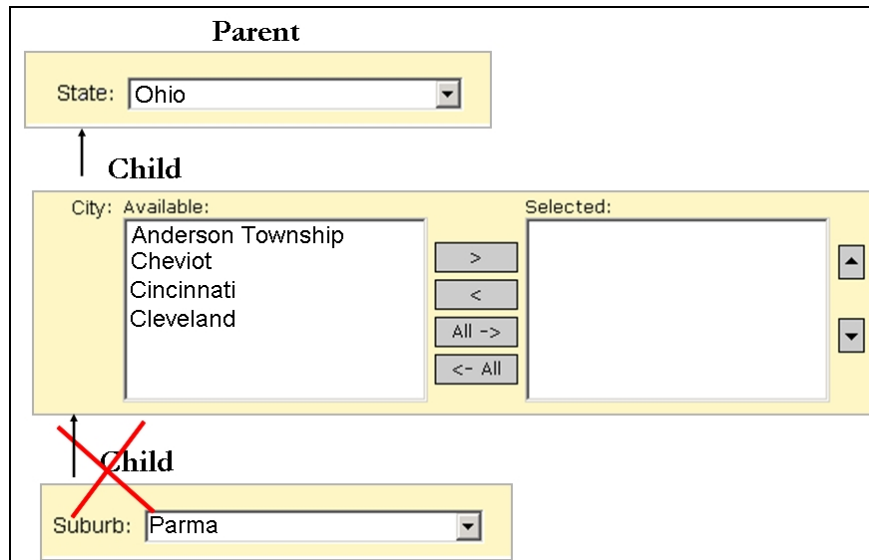
Because **City** is a child that uses the list mover control type, it can't be a parent for any other setup list, for example, it can't be a parent to **Suburb**.

A setup list can be a parent if it is already a child using the drop-down control type. If **City** uses a drop-down list, it can be a parent to **Suburb**.

Figure 184: Rule 5 - A parent can be a child to another setup list
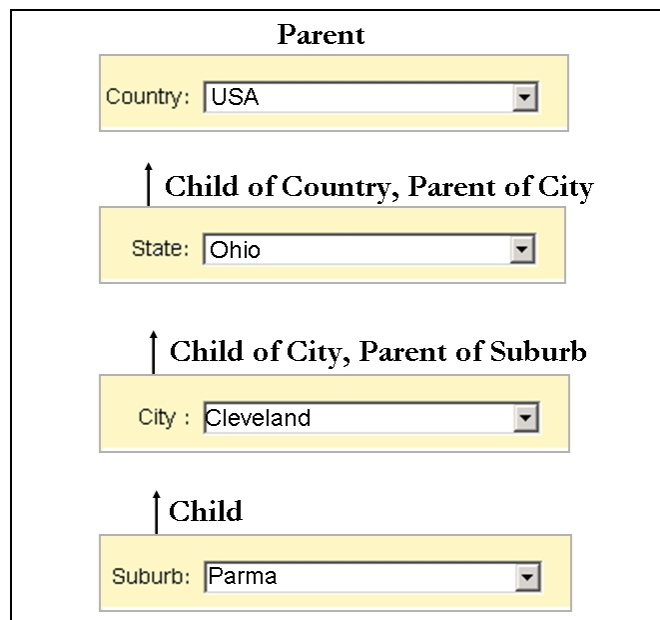
The **State** setup list can be the child for another parent such as **Country**. The control type [p. 511] must be a drop-down list, not a list mover, because **State** is also a parent of **City**.

Creating a custom setup list pair

Before creating a setup list pair [p. 481], review the setup list pair rules [see p.482]. Creating a custom setup list involves three processes: adding the setup list pair to the database (by using the Setup List Pair Management

feature); adding list items to the setup lists in the pair [p. 487]; and linking the setup lists together after the custom schema is created [p. 504].

To add the setup list pair to the database [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **cTools**, click <u>Manage Setup List Pairs</u>. The Manage Setup List Pairs page appears.
3 In the Actions menu, click **Add Setup List Pair**. The Add Setup LIst Pair page appears.
   - To delete a setup list pair, select it and in the Actions menu, click **Delete Setup List Pair**.
4 Enter or change information, which includes:
   - **Parent referenced setup list**: Ensure "<New>" is selected.
     - To use an existing parent setup list, select it. The information from the referenced parent setup list appears in **Parent name** and **Parent description**.
   - **Parent name**: The name of the parent setup list. This field is limited to 25 characters. Do not use numbers, special characters, or spaces.
   - **Parent description**: A description of the parent setup list. This description appears when you add list items on the Setup List Pair page. This field is limited to 39 characters and data entered cannot be identical to data in **Parent name**.
   - **Child Referenced Setup List**: To add a new child setup list, ensure <New> is selected.
     - To use an existing child setup list, select it. Information from the referenced child setup list appears in **Child name** and **Child description**. Only those components that have not already been used as children in other setup list pairs are available. Note: The child setup list cannot be the same as the parent.
   - **Child name**: The name of the child setup list. This field is limited to 25 characters. Do not use numbers, special characters, or spaces.
   - **Child description**: A description of the child setup list. This description appears when you add list items on the Setup List Pair page [p. 504]. This field is limited to 39 characters and data entered cannot be identical to data in **Child name**.
5 Click **OK**.

Adding list items to a custom setup list pair

After adding a custom setup list pair to the database [p. 486], the District Administrator can add the list items [p. 479]. If the setup list to which you are adding the list item is a child to another setup list, a panel appears with the name of the parent setup list [*Figure 185*].

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[1]You can do this if your role is District Administrator.

Figure 185: Child setup list with parent

A The setup list is **City**. In this example, if a user on the page chooses "Cheviot" from the drop-down list for City, "Hamilton County" will appear in County. If the user chooses Hamilton County from the drop-down list for County, the filtered list of cities in the City drop-down list will contain Cheviot.
B The setup list item is **Cheviot**.
C County is a parent setup list to City.
D The parent list item is Hamilton County.

To add items to a setup list pair [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click <u>Setup List Pairs</u>. The Setup List Pair page appears.
3 In the **Name** column, click the setup list pair to which the list items will be added. The <setup list name> Search page appears.
4 In the Actions menu, click **Add <setup list name>**.
   * To edit a setup list pair item, perform a search, select the item and in the Actions menu, click **Edit <setup list name>.**
   * To delete a setup list pair item, perform a search, select the item and in the Actions menu, click **Delete <setup list name>.**
5 On the Add <setup list item name> page, enter or change information, which includes:
   * **Description**: The description of the setup list pair item.
   * **Code**: The code used to identify the setup list pair item.
   * [Optional] **State Description**: The state description of the item.
   * [Optional] **State Code**: The state code used to identify the item.
6 If a panel appears with the name of a parent setup list [*Figure 185*], in the **Available** list, double-click the parent list item to be associated with this child list item. The parent list item moves to the **Selected** list.
7 Click **OK**.

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[1]You can do this if your role is District Administrator.

Working with schemas

A *schema* is a set of tables in a database that are grouped together based on similar attributes. Each schema associates *metadata* (that is, information about the data) with its set of tables to describe their functions and interactions. cTools enables a District Administrator to create new schemas that extend out from the core schemas in PowerSchool SMS [*Figure 187*]. The administrator adds pages [*Figure 188*], panels [*Figure 189*], and fields [*Figure 190*] to these custom schemas in order to enhance features and functions and collect data that is specific to a school district.

There are three categories of schema: A *Main schema* is always "built-in", meaning it comes predefined with PowerSchool SMS. The administrator can use cTools to edit fields in a Main schema [p. 505], but cannot add new pages or fields. Adding pages, fields, and functions to PowerSchool SMS requires the creation of either an *Extension schema* or a *Child schema* [p. 493]. An Extension schema's fields display as regular fields on a page, whereas the fields in a Child schema appear as a grid.

Custom schemas extend out from the Main schema and inherit the auditing properties [p. 494] and calendar settings [p. 501] from the Main schema; the administrator can choose to keep these settings or change them in the custom schema. Custom schemas can be locked from changes [p. 473].

There are some Extension and Child schemas that are built into PowerSchool SMS. Built-in Extension and Child schemas cannot be changed. The administrator can add a custom Extension or Child schema to a Main schema and to a built-in Child schema, but not to a built-in Extension schema. All PowerSchool SMS Main schemas and built-in Extension and Child schemas are locked [p. 473] to prevent changes; however, some panels and pages in these schemas are not locked see *PowerSchool SMS Optional package* [p. 530].

For the Student Demographic feature area [p. 474], the administrator can make a custom schema available at the district-level or at the school-level. Opting to have the schema available at the district-level means the schema can be viewed by users logged on to PowerSchool SMS with district user permissions or with school user permissions. On the other hand, only users logged on with school user permissions can gain access to a school level schema - the control bar link does not appear in the associated feature area for users logged on with district user permissions.

When you create a custom schema in the District Setup feature area, unlike customizations created for other schemas, which typically show a link in a control bar, custom pages created for the District Setup feature area are accessible via a link under **District** on the District Setup page.

Example: Creating a custom schema with pages, panels and fields

The following example illustrates how the District Administrator would create a custom extension schema [p. 489] in the Student Demographics

feature area [p. 474], that is available to both district-level and school-level users. The sample schema's name is **Communication**; it contains a page named **Student Communication** and a **Contact Info** panel with two fields in which users can enter a student's cellphone and email address [*Figure 186*].

Figure 186: Example of custom schema with a page, panel and fields
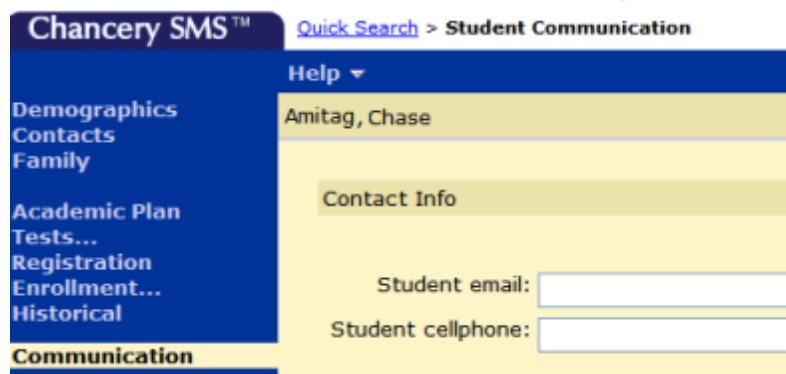
The steps to creating this sample custom schema are:

- *Step 1: Create an extension schema* [p. 490]
- *Step 2: Configure fields* [p. 491]
- *Step 3: Add the page to the schema* [p. 491]
- *Step 4: Add the panel to the page* [p. 492]
- *Step 5: Add the custom fields to the panel* [p. 492]

Note: As an alternative to creating a custom schema in this instance and depending on district requirements, the District Administrator could choose to simply add a new panel and fields to an existing demographics page see *Working with custom pages, panels, and fields* [p. 505].

Step 1: Create an extension schema

The District Administrator creates the **Communication** schema by extending the PowerSchool SMS built-in Main schema **DistrictStudent** [*Figure 187*] [see also *Adding Extension and Child schemas* p.493]. **Note**: Extending the DistrictStudent schema ensures every user with appropriate permissions [p. 246] can use the schema. To limit access to school-level users only, the District Administrator would extend the PowerSchool SMS built-in Main schema **SchoolStudent**.

Figure 187: Create Extension schema

A   Built-in, locked [p. 473] Main schema [p. 489].
B   Custom Extension schema.

Step 2: Configure fields

The District Administrator then sets the field properties for the schema [*Figure 188*] [see also *Configuring fields in a schema* p.494].

Figure 188: Configure fields

A   Name of built-in, locked Main schema
B   Name of custom Extension schema.
C   Field in custom schema.

Step 3: Add the page to the schema

The District Administrator adds a page to the schema, names it **Student Communication,** and names the control bar link **Communication** [*Figure 189*] [see also *Adding a custom page to a schema* p.506].

Figure 189: Add page
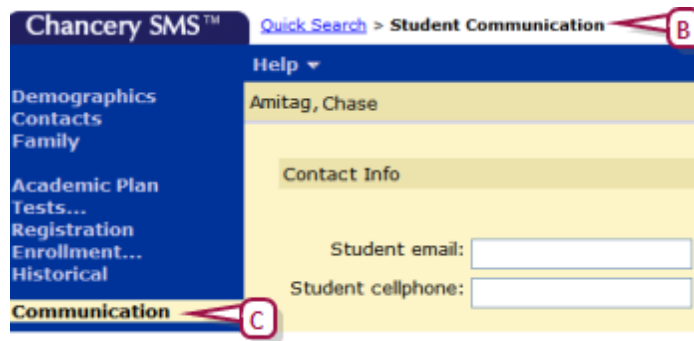
A   Built-in, locked Main schema
B   Custom page.
C   Link in control bar.

Step 4: Add the panel to the page

The District Administrator adds a panel named **Contact Info** to the page. A panel is required in order to add fields to a page [see also *Adding a custom panel to a page* p.508].

Figure 190: Add panel
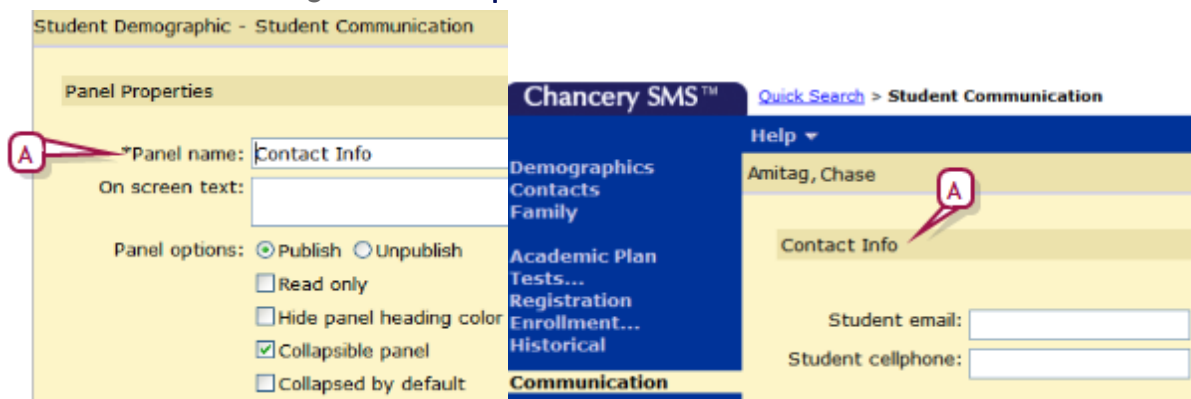
A   Custom panel.

Step 5: Add the custom fields to the panel

During the final step, the District Administrator adds the fields created in Step 2 to the panel created in Step 4 [*Figure 191*] [see also *Adding a custom field to a panel* p.509].

Figure 191: Add custom fields
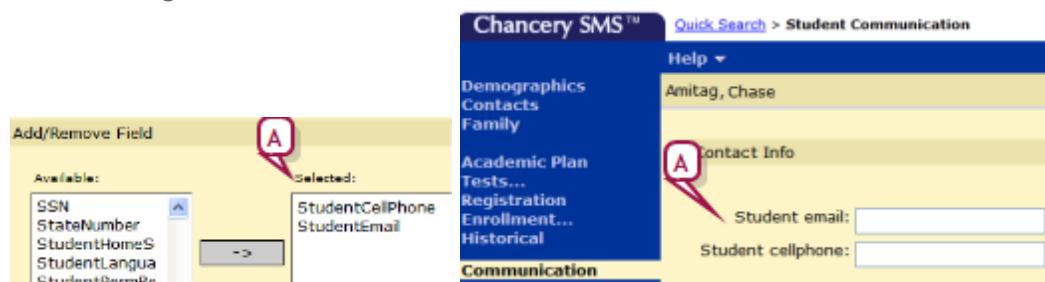
A   Custom schema fields

Adding Extension and Child schemas

An *Extension schema* has a one-to-one relationship with its associated *Main schema* [p. 489]. A District Administrator can add a custom Extension schema to a Main schema and to custom Child schemas; however, he or she cannot delete a custom Extension schema if it is referenced by a page in another schema in the database, nor can he or she change a built-in Extension schema, or add one custom Extension schema to another.

A *Child schema* has a one-to-many relationship to the Main schema. Fields in a Child schema appear as a grid on the page. The administrator can add a Child schema to a main schema and to another custom Child schema, but cannot add a Child schema to an Extension schema, change a built-in Child schema, edit or delete a Child schema that is locked [p. 473], or change a Child schema that is referenced by a page in another schema.

To add an Extension or Child schema [DA[1]]:

1   In the **Admin** menu, click **District Setup**. District Setup page appears.
2   Under cTools, click **Manage Schemas**. The cTools Manage Schemas page appears.
3   Click the feature area [p. 474] that contains the schema to be extended.
   - Student Health Tracking schemas originate from within the Student Demographic feature area. Therefore, to work with Health schemas, click the Student Demographic feature area.
4   On the Manage Schema Properties page, under **Schema name**, select the schema to be extended.
5   In the Actions menu, click **Add Schema > Add Child** or **Add Extension.**
   - To edit a schema, click it. It is possible to edit unlocked schemas [p. 473] created by others.
   - To delete a schema, select it and in the Actions menu click **Delete Schema**.
6   On the Add/Edit Child or Add/Edit Extension page, enter or change information, which includes:
   - **Schema Name**: The name of the custom schema. The name must be unique and have no spaces or underscores.
   - **Database table name: CDM_:** The name of the table in the custom schema. The name of a custom table in PowerSchool SMS is always prefixed by "CDM". The name cannot have spaces, use underscores instead.
   - **Display name**: The schema name as it appears on pages and in bread crumbs.
   - **Description**: Additional information about the schema.
   - **Default display field**: The field selected here is used to construct part of the audit message [p. 494] that appears when a change is made to

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[1]You can do this if your role is District Administrator.

any field in this custom schema. **Note**: No fields appear here until they are added to the schema see *Configuring fields in a schema* [p. 494].

- **Default search field**: The field users search on by default when searching on a custom schema (Extension schemas only) [p. 521]. The field you designate as the default search field should be the field that best describes the type of records in the schema. Specifying a default search field is optional; however, if a field is not specified as a default search field, the operators "includes" and "excludes" are not available in the search control. **Note**: No fields are available in this drop-down list until they are added to the schema see *Configuring fields in a schema* [p. 494].

- **Copy to planning calendar**: This option appears if the data in the Main schema [p. 489] can be different between the active and planning calendars. The setting for this option controls what happens to the data in the schema during Year-End Processing [p. 450]. If this option is selected, the data in this schema is copied from the active to the planning calendar during Year-End Processing; if not selected, data in this schema is deleted. The setting for this option defaults from the Main schema; however, the setting can be changed. Alternatively, individual fields can be set so that their data is not copied see *Setting calendar options for a custom field* [p. 501].

- **Keep in active calendar at year-end**: This options appears if the data in the Main schema [p. 489] is the same in both the active and planning calendars. If this option is selected, the data in this schema remains in the active calendar during Year-End Processing; if not selected, data in this schema is deleted. The setting for this option defaults from the Main schema; however, the setting can be changed. Alternatively, individual fields can be set so that their data remains in the active calendar at year end see *Setting calendar options for a custom field* [p. 501].

- **Enable auditing**: This setting controls whether the data in a custom schema is audited. The setting defaults from the Main schema; however, this setting can be changed on the Enable Auditing page see *Configuring fields in a schema* [p. 494].

7 Click **Save**.
8 Click **Apply Pending Changes.**

Configuring fields in a schema

After creating a custom schema see *Adding Extension and Child schemas* [p. 493], a District Administrator sets up fields in the schema and defines field properties [*Figure 188*]. Later, the District Administrator will add these fields to the pages and panels he or she creates in the custom schema [p. 505]. Fields in the schema can be one of several *data types* see *Specifying how data is entered in the database* [p. 500]. **Note:** Fields can be configured for custom Extension and Child schemas, but not for built-in Extension and Child schemas and not for Main schemas.

To configure a field for a custom schema [DA[1]]:

1   In the **Admin** menu, click **District Setup**. District Setup page appears.
2   Under **cTools**, click <u>Manage Schemas</u>. The cTools Manage Schemas page appears.
3   Click the feature area [p. 474] that will contain the new field. The Manage Schema Properties page appears.
    - Student Health Tracking schemas originate from within the Student Demographic feature area. Therefore, to work with Health schemas, click the Student Demographic feature area.
4   Under **Schema name**, click the applicable custom schema. The Add/Edit Extension or Add/Edit Child page appears.
5   In the Actions menu, click **Add Field**.
    - To edit field properties, click the field. The Edit Field page appears.
    - To delete a field: Under **Schema fields**, select the field. In the Actions menu, click **Delete Field**. In the confirmation dialog, click **OK**.
6   On the Add Field page enter or change information, which includes:
    - **Display name**: The field name as it appears to users.
    - **Schema field name**: The schema name for the field. The name must be unique, can only have letters with no spaces, and cannot be changed once this page is saved.
    - **Database field name**: The database name for the field. The name must be unique, can only have letters with no spaces, and cannot be changed once this page is saved.
    - **Data type** [p. 500]: Select the field data type. The data type name and its options appear under **<data type> Options**. The data type cannot be changed once this page is saved.
    - **Description**: A description of the field.
7   Under **<data type> Options** [p. 494], complete the properties specific to the data type selected above:
    - For the *Alphanumeric* data type, enter information under **Alphanumeric Options**:
        - **Max chars allowed**: The maximum number of characters users can enter in the field. The value cannot be changed after it is created in the database [p. 517].
        - **Required field**: Users must complete the field before they can close the page. On a page, a required field is indicated with an asterisk (*).
    - For the *Numeric* data type, enter information under **Numeric Options**:
        - **Max digits allowed**: The maximum number of digits, both before and after the decimal point, users can enter into the field. The number entered here cannot be changed after it is created in the database [p. 517].

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[1]You can do this if your role is District Administrator.

- **Decimal places**: The number of digits that appear to the right of the decimal point. The number entered here cannot be changed after it is created in the database [p. 517].
- **Default**: The value that appears when users first arrive at the field.
- **Numeric range**: The lowest and highest values that users can enter in the field.
- **Required field**: Users must complete the field before they can close the page. On a page, a required field is indicated with an asterisk (*).
- For the *Date* data type, enter information under **Date Options**:
  - **Required field**: Users must complete the field before they can close the page. On a page, a required field is indicated with an asterisk (*).
  - **Default to today's date**: Displays the current date in the field.
- For the *Yes/No* data type, enter information under **Yes/No Options**:
  - **Default**: Determines whether the Yes/No check box will be selected by default.
- For the *Setup List* data type, enter information under **Setup List Options**:
  - **Referenced setup list**: There are two options for this field: select the name of an existing setup list [p. 477] (recommended); or select <New>. Selecting <New> creates a new setup list (when you apply pending changes) with the same name as the Database field name.
  - **Default value**: To have a setup list appear when users first arrive at the field, select the setup list.
- For the *Memo* or *File* data type, enter information under **Memo Options** or **File Options**:
  - **Required field**: Users must complete the field before they can close the page. On a page, a required field is indicated with an asterisk (*).
- For the *Collection* data type, enter information under **Collection Options**:
  - **Referenced setup list**: There are two options for this field: select the name of an existing setup list (recommended); or select <New> to create a new setup list [p. 477] with the same name as the Database Field name. The value cannot be changed after it is created in the database [p. 517].

8 Click **OK**. On the Add/Edit Extension or Add/Edit Child page, the field appears under Schema Fields.
- Or, click **Save & Add** to add the next field.

9 Select a **Default display field**. The field selected here is used to construct part of the audit message that appears when a change is made to data in any of the fields in the schema [p. 494].

10 [Optional] Select a **Default search field**. The field users search on by default when searching a custom Extension schema [p. 521]. The field designated as the default search field must be of the data type Setup List [p. 500] and should be the field that best describes the type of records in the schema. Specifying a default search field is optional; however, if a field is not

specified as a default search field, the operators "includes" and "excludes" are not available in the search control.

11 Click **Save**.

12 Click **Apply Pending Changes**.

Adding a custom field to the student search

The District Administrator can make certain cTools fields in DistrictStudent and SchoolStudent schemas—in the Student Demographics feature area—available for selection in grid views [p. 22] [*Figure 194*]. When a user selects a grid view that contains the custom field, the field appears as a column in the **Search Results** grid on the district or school **Student Search** page [*Figure 192*] or on the **Inactive Student Search (Past Years)** page.

Whether a custom field can be added to grid views depends on the schema type and the field's data type. For Extension schemas, custom fields of every data type [p. 500] except "File" can be made available to grid views. For Child schemas, custom fields with a data type of "Alphanumeric", "Numeric", "Date", "Yes/No" and "Setup List" can be made available.

The way in which the data in the cTools field appears in the student search results grid also depends on the schema and on the field's data type. In an Extension schema, field content appears as a single row, except content for fields of type Memo and Collection, which appears under a collapsible heading [*Figure 192*]. In a Child schema, the content in custom fields always appears under a collapsible heading [*Figure 193*].

The administrator can assign permissions [p. 246] to the schema to which the custom field belongs so that only users with the appropriate permission can create a grid view that includes this field. If a schema that contains a field enabled for grid views is deleted, the permission is removed from all roles.

When a user performs a grid print [p. 30] of student search results, the content of Memo and Collections fields in Extension schemas and the content of all fields in Child schemas is collapsed by default; however the user can choose to expand the entries to show the content in the grid print report.

Figure 192: Extension schema fields in student search results grid

A   Yes/No field in an extension schema.

B   Memo field [p. 511] in an Extension schema. The user can view (and hide) the data in the memo field by clicking the arrowhead.

C   Collection field [p. 511] in an Extension schema. The user can view (or hide) the content by clicking the arrowhead.

Figure 193: Child schema fields in search results

	Student Name (LFM)	ID	Special Recognition
☐	Beesley, Shanel	10462852	▼ 4 Records
			05/21/2010 Awarded $200 bursary
		A	05/22/2010 Elected as student representative
			06/01/2010 Received commendation from chief
			07/05/2010 Awarded $10,000 scholarship
☐	Belknap, Herschel	10461961	
☐	Bellanger, Donald	11201123	▶ 1 Record

A   Child schema fields. In this example, the first entry is a Date field, the second is a Setup List field, and the third is an Alphanumeric field. The field delimiter used is the default, which is a space. The user can view (or hide) the group of fields by clicking the arrowhead.

To make a custom field available in grid views [DA[1]]:

1   In the Student Demographics feature area [p. 474], configure the custom field see *Configuring fields in a schema* [p. 494].

2   On the Add/Edit Extension or Add/Edit Child page, in the Actions menu, click **Enable for Grid Views**. The Enable for Grid Views page appears.

3   Under **Fields**, in the **Available** list, double-click the field to be made available in the grid views. The field moves to the **Selected** list.

   - If this custom field is in a Child schema, a **Field delimiter** field is available in which you can enter up to 10 characters (letters, numbers, or symbols). The delimiter appears between each selected field value in the student search results [*Figure 193*]. If no delimiter is entered here, PowerSchool SMS puts a space between each field value.

4   [Optional] Under **Security**, select **Create grid views permission**.

   - PowerSchool SMS creates a permission under the **User Settings** category on the Base Role page that controls which roles [p. 240] have permission to select the custom field in the grid views.
   - The permission name created is **<schema name> - available in grid views** and by default is set to **Yes** for the District Administrator role and **No** for all other roles.

5   Click **OK**.

   - To see the custom field in grid views [*Figure 194*], stop PowerSchool SMS Task Manager [see p.380], click **Apply Pending Changes** [see p.517], and then reset IIS [see p.521].

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[1]You can do this if your role is District Administrator.

Figure 194: cTools fields in grid view
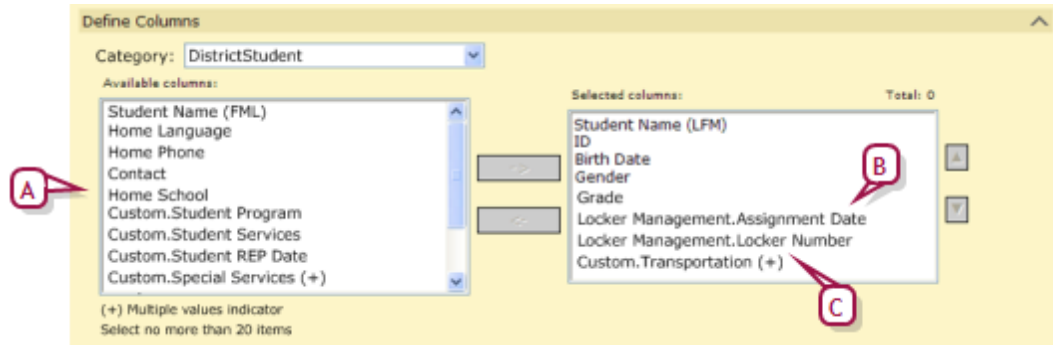
A   Fields that were created in the DistrictStudent Main schema prior to Chancery SMS 6.7.0 and that are now grid view enabled are prefixed with "Custom" when the user is logged in as a district user. If the user is logged in as a school user, the prefix is "DistrictStudent".

B   Fields in a "Locker Management" custom Extension schema that was created in Chancery SMS 7.5.0 or higher.

C   Child schema fields from a grid named "Transportation". In student search results, fields will appear under a collapsible entry [*Figure 193*].

Controlling which users can assign values to custom fields

By default, all users can use **Assign > Values** or **Assign > Multi-values** on the Student Search page to assign values to the custom fields in a DistrictStudent or SchoolStudent Child or Extension schema. **Note**: Custom fields of every data type [p. 500] except "File" can be assigned values.

The District Administrator can remove the ability to assign values to a field, or keep this option enabled but create a permission [p. 246] for the schema to which the custom field belongs so that only designated users can assign values to the field in the schema. If a schema containing an assignable field is deleted, PowerSchool SMS removes the permission from all roles.

Figure 195: Assign value to custom field
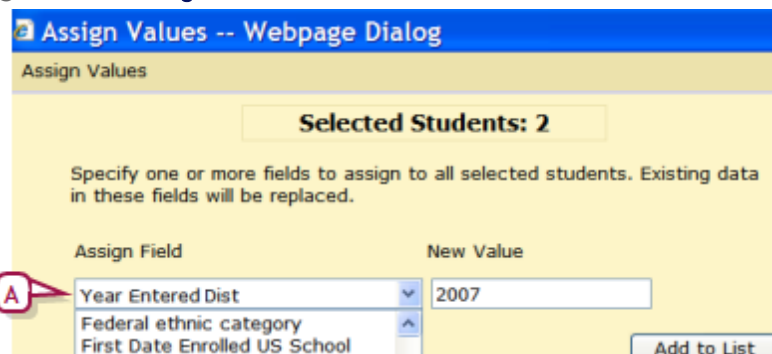
A   Custom field.

To control which users can assign values to a custom field

]:

1 In the Student Demographics feature area [p. 474], configure the custom field see *Configuring fields in a schema* [p. 494].

2 On the Add/Edit Extension or Add/Edit Child page, in the **Actions** menu, click **Enable for Mass Assign**. The Enable for Mass Assign page appears.

3 Under security, click **Create mass assign permission**.
- PowerSchool SMS create a permission under the **User Settings** category on the Base Role page. This permission controls which roles [p. 240] have permission to select the custom field in the Assign Values or Assign Multi-Values dialog. The permission name created is **<schema name> - available in mass assign** and by default is set to **Yes** for the District Administrator role and **No** for all other roles.
- To prevent a field from appearing in the Assign > Values or Assign > Multi-Values dialog for any user, in the **Selected** list, double-click the field. The field moves to the **Available** list.

4 Click **OK**.

Specifying how data is entered in the database

When the District Administrator configures a custom field for a schema, he or she defines how the data should be entered in the database. The mechanism used to determine how data is entered is called a *data type*. Each data type can have one or several options. For example, for some data types the administrator can specify whether the data should be required and/or what the default data should be [*Table 77*, p.500].

Later, when the administrator adds the field to the custom schema [p. 509], he or she can define how the data will actually appear on screen. The mechanism used to display data on screen is called a *control type* [p. 511].

PowerSchool SMS supports several field data types [*Table 77*, p.500].

Table 77: **Field data types**

Data type	Data captured in the database	Data type options
Alphanumeric	Both alphabetical and numeric characters	You can set the maximum number of characters allowed and specify whether the field is required.
Numeric	Numeric characters	You can enter the maximum number of digits allowed, the number of decimal places, the default value, the numeric range, and whether the field is required.
Date	A date	You can specify whether the field is required and whether to default to today's date.
Yes/No	Yes and No choices specified using radio buttons	You can choose Yes or No as the default.
Setup list	Captures list items	You can select the referenced setup list and the default value.

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[1]You can do this if your role is District Administrator.

Data type	Data captured in the database	Data type options
Memo	Multiple lines of text	You can specify whether the field is required.
File	File attachments	You can specify whether the field is required.
Collection	Displays list items [p. 479]. In an Extension schema, items appear in a List Mover on a page. In a Child schema, items appear in a Grid on a page [see also *Supported field data type/control type combinations* p.511].	You can select the referenced setup list.

Setting calendar options for a custom field

Feature areas [p. 474] in PowerSchool SMS are either *calendarized* or *non-calendarized*. The data in a schema in a calendarized feature area is typically different between the active calendar and the planning calendars [p. 169]. Class scheduling information is an example of data in a calendarized feature area. In contrast, non-calendarized data such as facilities information is available in both calendars and any change made to the data appears in both calendars. A schema inherits its calendar properties (calendarized or non-calendarized) from its associated feature area.

When a District Administrator creates an Extension schema [p. 493], the schema inherits the calendar properties and the calendar options from the Main schema. The administrator can choose to use the inherited calendar options or change them to meet the needs of the school district.

Calendar options for custom schemas differ depending on two settings: whether the schema is calendarized or non-calendarized and whether a calendar option is selected in the schema. Schemas with calendarized data display a **Copy to planning calendar** field on the Add/Edit (Main, Extension, or Child) pages, while schemas with non-calendarized data display a **Keep in active calendar at year-end** field [*Figure 196*].

Figure 196: Calendarized and non-calendarized Main schema
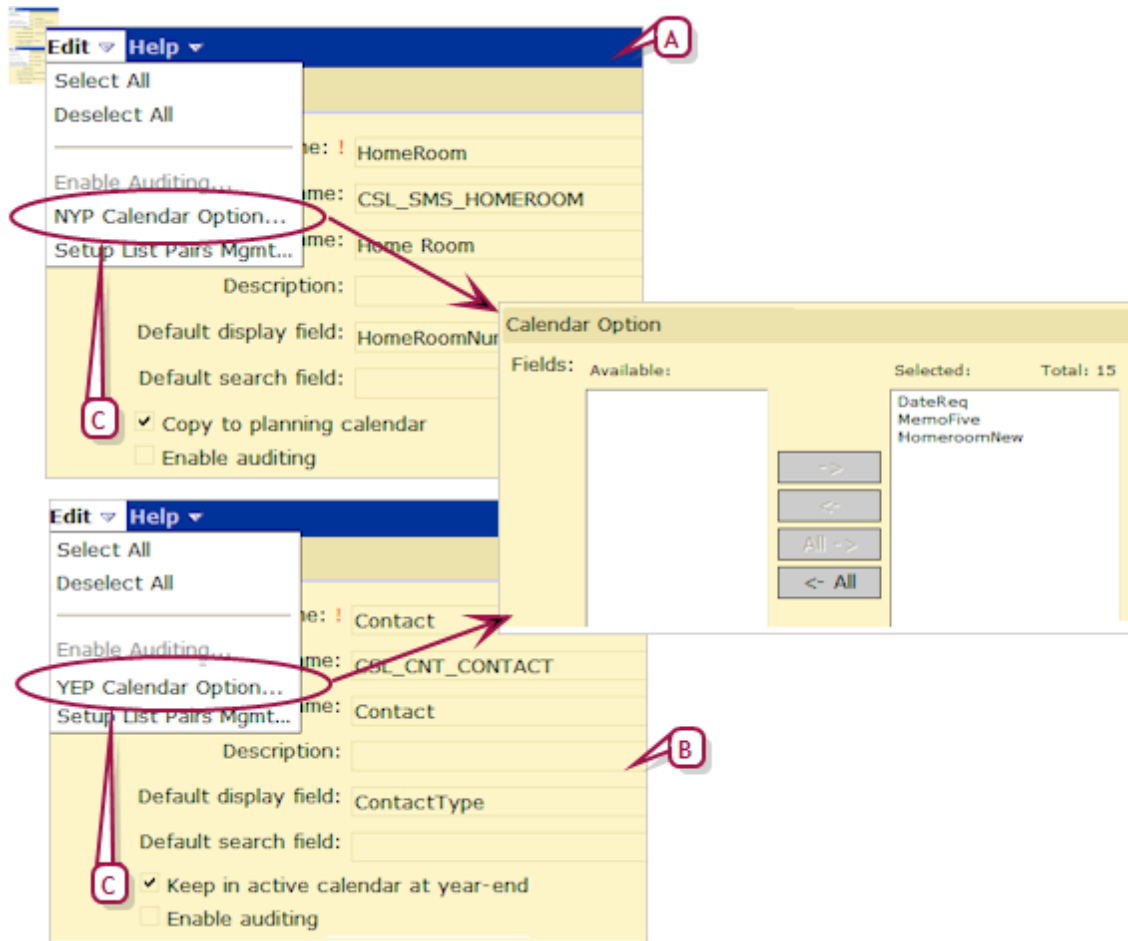
A Calendarized schema
B Non-calendarized schema
C If the **Copy to planning calendar** or **Keep in active calendar at year end** option is selected in the Main schema, all fields appear in the Selected list on the NYP or YEP Calendar Options page. (If a calendar option is not selected, all fields appear in the Available list). The District Administrator can change these settings by moving the fields either left or right.

Although a custom schema inherits the calendar settings of the Main schema, it is possible to change these settings for individual fields in the custom schema. The administrator cannot change whether a schema is calendarized or non-calendarized but can control what happens to the data in the schema's fields during Next-Year Preparation [p. 435] (for fields in a calendarized schema) or during Year-End Processing [p. 450] (for fields in a non-calendarized schema) [*Figure 196*].

To change calendar settings for a field: [DA[1]]

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[1]You can do this if your role is DistrictAdministrator.

1 In the **Admin** menu, click **District Setup**. District Setup page appears.

2 Under **cTools**, click **Manage Schemas**. The cTools Manage Schemas page appears.

3 Click the feature area [p. 474] that contains the field to be updated.
   - Student Health Tracking schemas originate from within the Student Demographic feature area. Therefore, to work with Health schemas, click the Student Demographic feature area.

4 On the Manage Schema Properties page, under **Schema name**, click the applicable schema. The Add/Edit Extension or Add/Edit Child page appears.

5 In the Edit menu, click **NYP Calendar Option** (for calendarized schema) or **YEP Calendar Option** (appears for non-calendarized schema). The *NYP* or *YEP* Calendar Option page appears [*Figure 196*].

6 To have the field's data copied to the planning calendar or kept in the active calendar at year end, double-click the field in the **Available** list. The field moves to the **Selected** list.
   - Or, to not have PowerSchool SMS copy the data to the planning calendar or to have PowerSchool SMS discard it from the active calendar at year end, double-click the field in the **Selected** list. The field moves to the **Available** list.

7 Click **OK**.

Setting field auditing properties

The Database Audit Log [p. 166] in PowerSchool SMS provides date- and time-stamped records of user activity In fields that have been enabled for auditing. The fields in a custom schema inherit the data auditing properties from the Main schema [p. 489]; however, the District Administrator can change this setting to meet the needs of the district. The administrator can choose to have PowerSchool SMS audit all fields in the custom schema or select individual fields for auditing. **Note**: To enable auditing of individual fields, the custom schema to which the fields belong must also be audit-enabled.

If data auditing is removed from a previously audit-enabled schema, the associated fields remain audit-enabled. This means that if the schema is audit-enabled again in the future, the schema's fields are automatically re-enabled for auditing.

Data auditing can be enabled for custom fields of the following data types [p. 500]:

- Alphanumeric
- Numeric
- Date
- Yes/No
- Setup List
- Collection

To change a field's auditing properties: [DA[1]]

1 In the **Admin** menu, click **District Setup**. District Setup page appears.
2 Under **cTools**, click <u>Manage Schemas</u>. The cTools Manage Schemas page appears.
3 Click the feature area [p. 474] that contains the field to be audit enabled.
  - Student Health Tracking schemas originate from within the Student Demographic feature area. Therefore, to work with Health schemas, click the Student Demographic feature area.
4 On the Manage Schema Properties page appear, under **Schema name**, select the applicable schema. The Add/Edit Extension or Add/Edit Child page appears.
5 Select **Enable auditing**.
  - This option must be selected and the page saved in order to enable the **Enable Auditing...** option in the Edit menu.
6 Click **Save**.
7 In the Edit menu, click **Enable Auditing**. The Enable Auditing page appears.
  - If the Main schema that this custom schema is extending is audit enabled, by default all the custom fields appear in the **Selected** list. If the Main schema is not audit enabled, all fields appear in the **Available** list.
8 In the **Available** list, double-click the field to be audit enabled. The field moves to the **Selected** list.
  - To disable auditing of a field, double-click the field in the **Selected** list. The field moves to the **Available** list.
9 Click **OK.**
10 Click **Apply Pending Changes**.

Linking setup list pairs in a custom schema

A setup list pair [p. 481] is a pair of drop-down menus that work together in a parent-child relationship. We recommend that the District Administrator create the setup list pair [p. 486] first then, once the custom schema is created, link the setup list pairs together. Linked setup list pairs can be separated, as long as they have not been used to populate any fields in PowerSchool SMS.

To link a setup list pair [DA[2]]:

1 In the **Admin** menu, click **District Setup**. District Setup page appears.
2 Under **cTools**, click <u>Manage Schemas</u>. The cTools Manage Schemas page appears.
3 Click the feature area [p. 474] that contains the setup list fields to be linked.

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[1]You can do this if your role is School Administrator.
[2]You can do this if your role is District Administrator.

- Student Health Tracking schemas originate from within the Student Demographic feature area. Therefore, to work with Health schemas, click the Student Demographic feature area.

4   On the Manage Schema Properties page, under **Schema name**, select the relevant schema. The Add/Edit Extension or Add/Edit Child page appears.

5   Under **Schema Fields**, select the child and parent fields in the setup list pair.
- To verify that two setup list fields are part of a setup list pair, or to create a setup list pair, in the Edit menu click **Setup List Pairs Mgmt**.

6   In the Actions menu, click **Link Setup List Pairs**.
- To unlink a setup list pair, select the setup list that is the child in the setup list pair and in the Actions menu, click **Break Setup List Pairs**.

7   Click **Save**.

8   Click **Apply Pending Changes**.

Editing fields in a Main schema

A Main schema [p. 489] is a schema that comes built into PowerSchool SMS. A District Administrator can change the display name of a field, make a field required, or delete a field in a Main schema. To preserve the integrity of the system, new fields cannot be added to a Main schema.

To edit a Main schema [DA[1]]:

1   In the **Admin** menu, click **District Setup**. The District Setup page appears.

2   Under **cTools**, click **Manage Schemas**. The cTools Manage Schemas page appears.

3   Click the feature area [p. 474] that contains the relevant Main schema. The Manage Schema Properties page appears.

4   Click the Main schema to be edited.
- PowerSchool SMS indicates a Main schema by displaying the word **Built-in** in the **Schema type** column and **Main** in the **Schema category** column.

5   On the Add/Edit Main page, click the field to be edited.
- To delete a field, in the Actions menu click **Delete** field.

6   Make the field changes.

7   Click **OK**.

8   Click **Apply Pending Changes**.

Working with custom pages, panels, and fields

Adding pages, panels, fields, and objects to a custom schema in PowerSchool SMS involves the following steps, in strict order:

1   Add a page [p. 506].

2   Add a panel to the custom page [p. 508].

3   Add fields to the custom panel [p. 509].

---

[1]You can do this if your role is District Administrator.

4 Turn off the PowerSchool SMS Task Manager to enhance performance while applying pending changes to custom pages [p. 472].

5 Apply pending changes for custom schemas [p. 517].

6 Publish and apply pending changes for custom pages [p. 517].

7 Reset the Internet Information Server (IIS) [p. 521].

8 Turn on the Chancery SMS Task Manager to regenerate the data access views [p. 380].

Other optional steps include grouping custom pages to create a collapsible menu in the control bar [p. 507] and adding objects to a panel [p. 513].

Note: If a custom schema is locked [p. 473], only the schema creator can make changes to the schema. Other customizers can extend the schema, but cannot edit it directly or delete it, and can add new panels to pages in the locked schema but cannot change existing panels and fields.

Adding a custom page to a schema

The District Administrator can add pages to unlocked [p. 473] custom schemas [p. 489] and to built-in schemas in customizable feature areas [p. 474].

To add a page [DA[1]]:

1 In the **Admin** menu, click **District Setup**.The District Setup page appears.

2 Under **cTools**, click <u>Manage Pages</u>. The cTools Manage Pages page appears.

3 Click the relevant feature area [p. 474]. The Manage Page Details page appears.

4 In the Actions menu, click **Add Custom Page**.
   - To edit a custom page, click the page name.
   - To delete a custom page, select the page and in the Actions menu click **Delete Custom page**.

5 On the Add/Edit Page page, under **Page Properties**, enter or change information, which includes:
   - **Schema**: The schema to which the page is added.
   - **Page name**: The name of the page as it appears on the page and in the bread crumbs.
   - **Left menu name**: The name of the link to the page as it appears in the control bar.
   - **Page description**: A description to help users identify the page's purpose.

6 Click **Save**. The new custom page appears under **Custom Pages** on the Manage Page Details page.

7 Add panels [see p.508] and fields [see p.509] to the custom page.

8 Check page permissions to ensure they are appropriate see *Custom page permissions* [p. 519].

---

[1]You can do this if your role is District Administrator.

Grouping pages

When adding multiple related custom pages [p. 506], it is possible to group the pages together [*Figure 197*]. Grouping pages keeps the control bar a manageable length because PowerSchool SMS displays grouped pages as a collapsible menu in the control bar.

Figure 197: Grouped pages
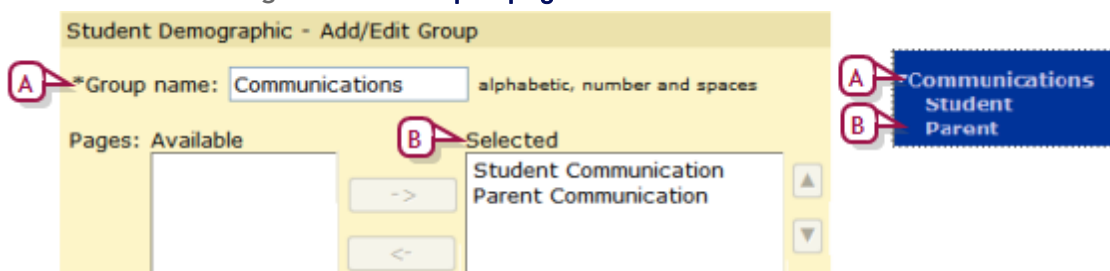
A   Group
B   Custom page links

To group pages [DA[1]]:

1   In the **Admin** menu, click **District Setup**. The District Setup page appears.
2   Under **cTools**, click **Manage Pages**. The cTools Manage Pages page appears.
3   Click the relevant feature area [p. 474].
4   On the Manage Page Details page, in the Actions menu click **Add Group**.
   - To edit a group of pages, under **Custom Pages** click the group name.
   - To delete a group of pages, select the group and in the Actions menu, click **Delete Group**.
5   On the Add/Edit Group page, enter a **Group name**.
   - The name entered here appears in the control bar.
6   In the **Available** list, double-click each page to be included in the group. The page moves to the **Selected** list.
7   Click **OK**.

Inserting a custom page into a built-in page group (Health only)

In the Student Health Tracking feature area [p. 474], there is the option to group custom pages with PowerSchool SMS built-in pages by creating a custom group [p. 507] with the same name as the built-in group. When PowerSchool SMS identifies groups of the same name, it includes all pages—built-in and custom—in one group.

For example, to add a page called "Other" to the built-in group "Screenings", the District Administrator would create a new group with the name

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[1]You can do this if your role is District Administrator.

"Screenings", add the custom page to the group, and then PowerSchool SMS inserts the page into the built-in Screenings group [*Figure 198*].

Figure 198: Page link in built-in group
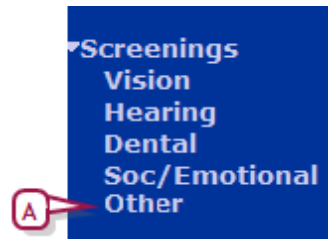
A Link to custom page added to built-in page group in control bar.

To insert a custom page into a built-in page group [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **cTools**, click Manage Pages. The cTools Manage Pages page appears.
3 Click **Student Health Tracking**. The Manage Page Details page appears
4 In the Actions menu click **Add Group**.
5 For **Group Name**, enter the name of the built-in group into which the custom page is to be inserted.
6 In the **Available** list, double-click the custom page to be added to the group. The page moves to the **Selected** list.
7 Click **OK**.

Adding a custom panel to a page

A panel helps organize the information on a page by grouping fields that are alike. A District Administrator can add an unlimited number of panels to custom and built-in pages. The administrator has some ability to specify how the panel will appear; for example, the panel heading color can be hidden, the panel can be made collapsible, or the panel can be made read only.

When an administrator adds a panel to a page, the panel is inserted directly below any panels that are built into PowerSchool SMS and above any PowerSchool SMS pages that are built-in but were created using cTools.

To add a panel [DA[2]]:

1 In the **Admin** menu, click **District Setup**.The District Setup page appears.
2 Under **cTools**, click Manage Pages. The cTools Manage Pages page appears.
3 Click the relevant feature area [p. 474]. The Manage Page Details page appears.

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[1]You can do this if your role is District Administrator.
[2]You can do this if your role is District Administrator.

4   Under **Custom Pages**, click the page to which the panel will be added. The Add/Edit Page page appears.

5   In the Actions menu, click **Add Page Panel.**
    • To edit a panel, select the panel and in the Actions menu click **Edit Page Panel**.
    • To delete a panel, select the panel and in the Actions menu click **Delete Page Panel**.

6   On the Add/Edit Panel page, under **Panel Properties**, enter or change information, which includes:
    • **Panel name:** The name of the page as it appears in the panel header.
    • **On screen text**: Instructions to help users use the panel appropriately. On a page, on-screen text appears below the panel heading.
    • **Panel options**:
        • **Publish:** The panel is visible on the associated page. As long as the page is not published, the Panel option can be set to Publish without affecting users [see p.517]
        • **Unpublish**: The panel is not visible on the associated page [see p.517].
        • **Read only**: None of the fields on the panel can be edited by users.
        • **Hide panel heading color**: The panel heading is the same color as the panel. **Note:** When you select this option, selecting the option **Collapsible** or **Collapsed by default** has no effect; that is, users cannot collapse the panel nor is the panel collapsed on entry to the page.
        • **Collapsible panel**: Users can close the panel. **Note:** If the **Hide panel heading color** option is selected, selecting this option has no effect; that is, users will be unable to collapse the panel.
        • **Collapsed by default**: Works with the **Collapsible** option; the panel is closed when users arrive at the page. **Note:** If the **Hide panel heading color** option is selected, selecting this option has no effect.

7   Click **Save**. The Add/Edit Page page appears.
    • To change the order in which panels appear on the page, on the Add/Edit Page page, in the **Edit** menu click **Change Panel Order**. On the Change Order page, select the panel and use the up and down arrows to change the display order.

8   Add fields [p. 509] to the panel, and add objects if required [p. 513].

9   Click **Save**.
    • To see the new panel, stop PowerSchool SMS Task Manager [see p.380], click **Apply Pending Changes** [see p.517], and then reset IIS [see p.521].
    • If you are adding this panel to a custom page, check page permissions to ensure they are appropriate see *Custom page permissions* [p. 519].

Adding a custom field to a panel

A District Administrator can add fields to custom or built-in pages and specify how the field will appear on the page see *Supported field data type/control type combinations* [p. 511]. The administrator must first

configure the field at the schema level before he or she can add it to the panel on a page see *Configuring fields in a schema* [p. 494].

To add a field to a panel [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.

2 Under **cTools**, click <u>Manage Pages</u>. The cTools Manage Pages page appears.

3 Click the relevant feature area [p. 474]. The Manage Page Details page appears.

4 Under **Custom Pages**, click the page to which the field will be added. The Add/Edit Page page appears.

5 Under **Panel Selection**, click the panel to which you want to add the field.

6 On the Add/Edit Panel page, in the Actions menu, click **Add/Remove Field**.
   - To edit a field's properties, under **Panel Fields**, click the field. The Edit Field page appears.
   - To remove a field from a panel without deleting it from the schema, select the field and in the Actions menu click **Add/Remove field**.
   - To delete a field from the schema, select it and in the Actions menu, click **Delete Field/Object**. When you delete a field, you permanently delete all data entered in that field.

7 On the Add/Remove Field page, In the **Available** list, double-click the field. The field moves tot he **Selected** list.
   - To remove a field, double-click it in the **Selected** list. The field moves to the **Available** list.

8 Click **OK**. The Add/Edit Panel page appears.

9 Under **Panel Fields**, click the field. The Edit Field page appears.

10 Enter or change information, which includes:
   - **Label**: The name as it appears next to the field.
   - **Control type** [*Table 78*, p.511]: Determines how the field will appear on the page.
   - **Field options**:
       - **Publish:** The field is visible on the associated panel. As long as the panel is not published, the Field option can be set to Publish without affecting users [see p.517].
       - **Unpublish**: The field is not visible on the associated panel [see p.517].
       - **Read only**: The field cannot be edited by users.
       - **Show Add/Delete action menu items**: This option appears for grid pages only and enables you to display **Add** and **Delete** in the Actions menu of the grid page.

11 Click **OK**. The Add/Edit Panel page appears.
   - To change the order in which multiple fields appear in the panel, in the **Edit** menu, click **Change Field Order**. On the Change Order page,

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[1]You can do this if your role is District Administrator.

select the field and use the up and down arrows to change the display order

12 Add objects if required [p. 513].

13 Click **Save**.

- To see the new field, stop PowerSchool SMS Task Manager [see p.380], click **Apply Pending Changes** [see p.517], and then reset IIS [see p.521].

- If you are adding this panel to a custom page, check page permissions to ensure they are appropriate see *Custom page permissions* [p. 519].

Supported field data type/control type combinations
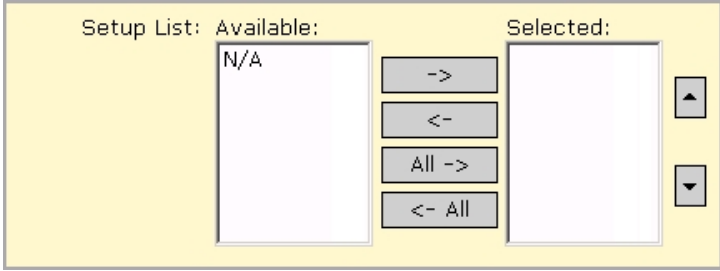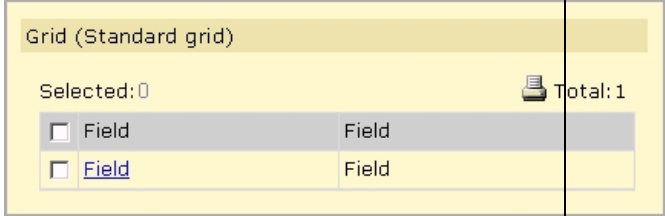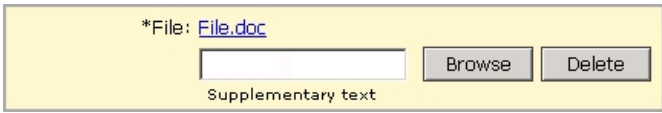
Each field has a *data type* and a *control type*. A field's data type determines how the data will be captured in the database.

The District Administrator selects a field's data type when he or she creates a schema [see also *Specifying how data is entered in the database* p.500]. A field's control type determines how the data will appear on screen, and is available for selection when the field is added to a panel on a page [p. 509].

The control type available is determined by the data type specified for the field in the schema. **Note**: For the data type "Collection", the schema type (Extension or Child) determines the control type [*Table 78*, p.511].

Table 78: **Data type/control type combinations:**

Data Type	Control Type	Description
Alpha-numeric	**Text box**	A single-line text field for letters and numbers. Options include entering supplementary text to provide additional information for users, and to have PowerSchool SMS validate the data in the field [p. 513]. *Alphanumeric: letters 12345 Supplementary text
Numeric	**Numeric box**	A single-line text field that accepts only numbers. Options include entering supplementary text to provide additional information for users. *Numeric: 888.00 Supplementary text
Date	**Date control**	A popup calendar and a field that accepts only dates. Options include entering supplementary text to provide additional information for users, and having PowerSchool SMS validate the data in the field [p. 513]. *Date: 6/8/2005 Supplementary text
Yes/No	**Check box**	A check box that users selected or deselected. Options include having PowerSchool SMS validate the data in the field [p. 513]. ☑ Yes/No
Setup list	**Drop-down list Combo box**	**Drop-down list**: A menu of items from a setup list.Options include having PowerSchool SMS validate the data in the field [p. 513]. **Combo box**: A drop-down list that when a user enters multiple letters, the first item in the setup list that starts with that sequence of letters appears.

Data Type	Control Type	Description
		Setup List: N/A ▼
Collection (Extension schema)	List mover	A pair of list boxes that contain available and selected items from a setup list. Options include having PowerSchool SMS validate the data in the field [p. 513]. Setup List: Available: N/A → ← All → ← All Selected: ▲ ▼
Collection (Child schema)	Standard grid	A display-only grid that holds multiple records, with links to a page where records can be edited. Options include including Add and Delete in the Actions menu. Grid (Standard grid) Selected: 0 🖨 Total: 1 ☐ Field Field ☐ Field Field
Collection (Child schema)	Editable grid	A grid that holds multiple records, where the records can be edited within the grid. Options include including Add and Delete in the Actions menu and selecting the number of rows users are permitted to add. Grid (Editable grid) Selected: 0 🖨 Total: 1 ☐ Field Field ☐
Memo	Multi-line text	A text field with room for multiple lines of text. Options include setting the number of lines of text that users are permitted to enter. Memo:
File	Attach- ment	A field that points to a file attachment stored in the database, with associated buttons to upload and delete the file. Options include entering supplementary text to provide additional information for users. *File: File.doc [ ] Browse Delete Supplementary text

Validating data in custom fields

For custom fields with certain data type and control type combinations [*Table 78*, p.511], a developer [p. 390] can set up PowerSchool SMS to validate the data entered into the fields. Because client validations are very technical, we recommend that a developer familiar with JavaScript create the validations. The developer must set up either a JavaScript file that contains a library of functions that can be used for validation or a JavaScript code block entered directly into the Client Validation panel. For information about creating Client Validations, see the *Chancery SMS cTools Client Validation Guide*, available from the support site.

Adding text and creating links

The District Administrator can use *objects* to add text, create headers, and add links. PowerSchool SMS has two types of objects:

* *Text Object*: Made up of lines of text. Typically, a District Administrator adds a Text Object to create a header, provide users with additional information about how to navigate through a page, or to act as a placeholder for a hyperlink [p. 513].
* *Link Object*: Appears on a panel as a hyperlink. A Link Object can provide a link to a Web page, a report, or a custom page in PowerSchool SMS [p. 514]. A Link Object can also provide a link to an external application [p. 516].

Note: You cannot add objects to a panel in a custom schema if the schema is locked [p. 473].

Adding text

District Administrators can add text to a panel by using a Text Object. PowerSchool SMS supports multiple Text Object formats [*Table 79*, p.514].

To add a Text Object to a panel [DA[1]]:

1 In the **Admin** menu, click **District Setup**.The District Setup page appears.
2 Under **cTools**, click **Manage Pages**. The cTools Manage Pages page appears.
3 Click the relevant feature area [p. 474]. The Manage Page Details page appears.
4 Under **Custom Pages**, click the page to which you want to add the Text Object The Add/Edit Page page appears.
5 Under **Panel Selection**, click the panel to which you want to add the Text Object. The Add/Edit Panel page appears.
6 In the Actions menu, click **Add Text Object**. The Add/Edit Text Object page appears.
7 Enter or change information, which includes:

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[1]You can do this if your role is District Administrator.

- **Object ID**: The name to be used internally by the database to identify the field, up to 25 characters. Do not use numbers, spaces, or special characters. This value cannot be changed once the changes are saved to the database.
- **Display name**: The name of the Text Object, up to 25 characters. This name is used only to identify the Text Object on the Add/Edit Panel page. The display name does not appear on the completed page.
- **Field options** [see p.517]:
    - **Publish**: The Text Object is visible on the panel.
    - **Unpublish**: The Text Object does not appear on the panel, even if the panel is published and visible. As long as the panel or associated page are not published, the object can be set to Publish without being visible.
- **Display on grid**: This option is applicable only to Child schemas [p. 489]. Select this option to add the Text Object to a grid.
- **Text type**:
    - **Normal**: Text appears in the PowerSchool SMS normal interface font.
    - **Header**: Text appears in the PowerSchool SMS page header size and font.
    - **Supplementary**: Text appears in the smaller PowerSchool SMS supplementary text font.
- **Display text**: The content of the Text Object. This is the text that appears on the completed page.

8 Click **OK**.

Table 79: Text Objects

Format	Description
Normal	Normal text appears in Verdana, 10 point, regular. This is a text object with a Text Type of "Normal".
Header	Header text appears in Verdana, 10 point, bold. **This is a text object with a Text Type of "Header".**
Supplementary	Supplementary text appears in Verdana, 8 point, regular. This is a text object with a Text Type of "Supplementary".

Changing a field or text into a hyperlink

To make a field or text on a panel into a hyperlink, the District Administrator uses a Link Object. The hyperlink can provide access to a:

- Web page: The link launches the new web page in a dialog.
- Custom page: The link launches a custom page.
- Report: The link launches the Report Options page for that report in a dialog.

Any Text Object can be turned into a link, as can any field with control type that can be displayed on a grid, such as a text box, numeric box, date control, check box, or drop-down list. However, PowerSchool SMS can only display a link on the completed page if the associated field appears in a read-only format. That means that editable fields must either have a read-only setting or be displayed in a standard grid.
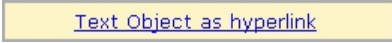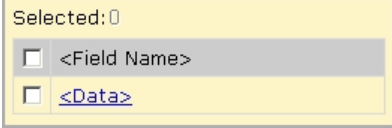
To add a Link Object to a panel [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.

2 Under **cTools**, click **Manage Pages**. The cTools Manage Pages page appears.

3 Click the feature area [p. 474] you want to change. The Manage Page Details page appears.

4 Under Custom Pages, click the page to which you want to add the Link Object. The Add/Edit Page page appears.

5 Under **Panel Selection**, click the panel to which you want to add the Link Object. The Add/Edit Panel page appears.

6 In the Actions menu, click **Add Link Object**. The Add/Edit Link Object page page appears.

7 Enter or change information, which includes:
- **Display name**: The name of the Link Object, up to 25 characters. This name is used only to identify the Link Object on the Add/Edit Panel page. The display name does not appear on the completed page.
- **Field options** [see p.517]:
  - **Publish**: The Link Object is visible on the panel.
  - **Unpublish**: The Link Object does not appear on the panel, even if the panel is published and visible. As long as the panel or associated page are not published, the object can be set to Publish without being visible.
- **Panel object**: The field or Text Object (from the Add/Edit Panel page) to be turned into a hyperlink.
- **Link to Web page**: The URL for an external web page [see also *Linking to an external application* p.516].
- **Link to Report**: The first field is the report category, the second field is the report name.
- **Alt-text**: Text that appears when the user holds the cursor over the link.
- **Link only when in grid**: This option appears only for pages in a Child schema. Select this option when the object should appear as a hyperlink only when it is in a grid [see *Any Text Object can be turned into a link, as can any field with control type that can be displayed on a grid, such as a text box, numeric box, date control, check box, or drop-down list. However, PowerSchool SMS can only display a link on the completed page if the associated field appears in a read-only format. That means that editable fields must either have a read-only setting or be displayed in a standard grid.* p.515].

8 Click **OK**.

---

[1]You can do this if your role is District Administrator.
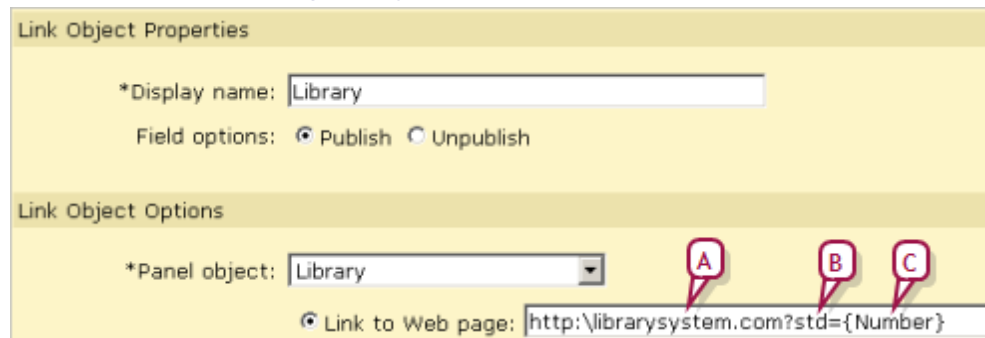
Panel Object	Description
Text Object	The entire display text of the Text Object appears as a hyperlink. Text Object as hyperlink
Read-only field	The read-only data for the field appears as a hyperlink. Read-only field: <Data>
Field in standard grid	The data in the column for the field appears as a hyperlink. Selected: 0 ☐ <Field Name> ☐ <Data>

Linking to an external application

The District Administrator can use a Link Object [p. 514] to link a field or text to another application; for example, to link a field on a student's record in PowerSchool SMS to the same student's record in a library system [*Figure 199*].

Figure 199: Linking an object to an external application:

A   External application URL.
B   External application database field name.
C   PowerSchool SMS metadata schema name.

When linking to an external application, the following rules apply:

* The PowerSchool SMS field number must be defined on the page in the external application.
* The PowerSchool SMS field to which the Link Object will be attached must be the control type Text Box [p. 511] and must be set to read-only.
* When creating the Link Object, both the URL and the parameter to pass in the Link to the Web Page field must be entered. The parameter name references the metadata schema name [p. 489], not the field name. For example, to reference Student ID, the schema name is {Number}; therefore, the parameter must be {Number}.

- Do not surround the metadata schema name in quotes because PowerSchool SMS cannot interpret this value. If the third-party application you are linking to requires quotes around the field name, use %22.
- The parameter to pass must exist on the page in the application you are linking to. The parameter in the example below is the Student ID field, which has a PowerSchool SMS schema name of {Number}. PowerSchool SMS passes this parameter to the external application's Student ID field, which is named "std" on the external application page.

Controlling access to custom schema and pages

District Administrators can control users' ability to work with custom pages in several ways: by assigning appropriate permissions [p. 519], by defining the settings for publishing in the page properties, and by applying pending changes see *Displaying custom schemas and pages* [p. 517]. The ability to make changes without applying them immediately is an important consideration when creating customizations in a production environment; changes to a system should only be published during times when no one is using that system.

Displaying custom schemas and pages

For custom pages and their panels and fields, the combination of **Pending Changes** and the **Publish/Unpublish** option determine whether users see those elements. These settings provide the District Administrators with the option to do the bulk of the customization and then publish fields and objects, and apply pending changes when the customization is complete.

Pending Changes

The **Pending Changes** status on the Add/Edit Extension and Add/Edit Child pages indicates whether changes that have been made to a schema, page, panel, field, or object have been created in the database [*Figure 200*]. Changes are not visible to users of PowerSchool SMS until the **Apply Pending Changes** button is clicked on the Add/Edit Extension or Child page for a schema or the Add/Edit Page or Panel page for a custom page or panel see *Saving custom schemas to the database* [p. 520].

Note: Before applying schema customization changes (that is, before clicking the **Apply Pending Changes** button), stop the PowerSchool SMS Task Manager see *Stopping the PowerSchool SMS Task Manager* [p. 519]. After applying customization changes, reset the Internet Information Server (IIS) see *Resetting the Internet Information Server (IIS)* [p. 521] and restart the PowerSchool SMS Task Manager see *Starting the PowerSchool SMS Task Manager* [p. 521], so that the new pages, panels, fields, and objects appear.

Publish/Unpublish

The **Publish/Unpublish** setting [*Figure 200*] (along with the **Pending Changes** status [p. 517]) determines whether a specific custom page, panel, field, or object is visible to users. If a District Administrator adds one of these elements but does not want to display it immediately, he or she can select **Unpublish.** Unpublish can also be used as an alternative to deleting an element, such as when there is uncertainty about whether the element might be required again at a later date.

When working with page elements, the publish/unpublish status is hierarchical; that is, a field inherits the publish/unpublish status of the panel and the panel inherits the publish/unpublish status of the page.

On the Add/Edit Page page, published/unpublished panels display "Yes" or "No" respectively in the **Published** column. On the Add/Edit Panel page, published/unpublished fields and objects display "Yes" or "No" respectively in the **Display field** column [*Figure 200*].

Figure 200 : Pending changes and publish statuses
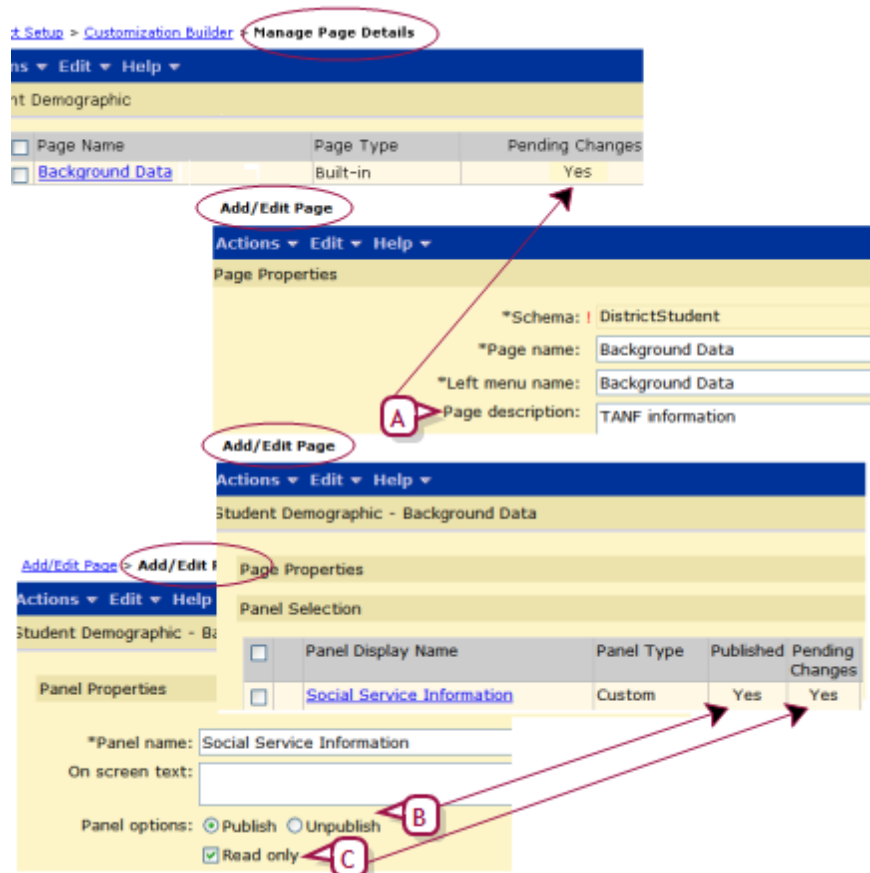
A   When a change is made on the Add/Edit Page page (in this example, a page description was added) and the page is saved, the Manage Page Details page displays "Yes" in the **Pending Changes** column. The changes do not take effect until the **Apply Pending Changes** [p. 520] button is clicked,

at which time "No" displays in this column and the changes are saved to the database.

B When the **Publish** option is selected, "Yes" appears in the **Published** column on the Add/Edit Page page; otherwise, "No" appears.

C When a change is made on the Add/Edit Panel page (in this example, the panel options are changed), and the page is saved, "Yes" appears in the **Pending Changes** column on the Add/Edit Page page.

Custom page permissions

When a District Administrator creates a custom page, the page name appears as a permission [p. 246] on the **Edit Base Role** and **Edit Roles** pages [p. 246], under the appropriate permissions category. Custom page permissions function in the same manner as built-in page permissions and can be changed for each role as required.

By default, access to use custom pages is set as follows:

- District administrators and district health professionals can add, edit, and delete pages.
- School administrators and school health professionals can add and edit pages.
- School secretaries and teachers can view pages.

District and school health professionals receive these default permissions because the permissions are based on the District Administrator and School Administrator base roles [p. 246], respectively. However, depending on the feature areas [p. 474] being customized, the default permissions may not be appropriate. When customization is complete, check the permissions for each new page and change the permissions as required [p. 246].

For custom panels, permissions are based on the existing permissions for the page to which the panels are added. For example, if a role has the Edit permission for the Add/Edit Incident page, that role will also have Edit permission for any custom panels added to that page.

Stopping the PowerSchool SMS Task Manager

When changes are made to the database, the View Generator task automatically runs in the PowerSchool SMS Task Manager to regenerate the data access views that are used to build report templates. This task is resource-intensive; therefore, to ensure the process is as quick and easy as possible, it is recommended that the District Administrator turn off the PowerSchool SMS Task Manager while applying customization changes.

Because stopping PowerSchool SMS Task Manager interrupts the use of PowerSchool SMS, if customizations are created in a production environment, it is recommended that you apply changes after hours.

To stop the task manager [DA[1]]:

1 Log off from PowerSchool SMS.

---

[1]You can do this if your role is District Administrator.

2 On the web server, from the **Start** menu, click **Settings >
Control Panel** > **Administrative Tools > Services**. The
Services window appears.

3 Right-click **PowerSchool SMSTask Manager Service**.

4 In the menu, click **Stop**.

Saving custom schemas to the database

Once all custom schemas are created, the District Administrator must apply
the pending changes to save them to the database. If customization is
occurring in a production environment, complete this process during off
hours so as not to disrupt the system. Remember to stop the PowerSchool SMS
Task Manager [p. 519] before applying pending changes.

To apply pending changes for a custom schema [DA[1]]:

1 In the **Admin** menu, click **District Setup**.The District Setup
page appears.

2 Under **cTools**, click **Manage Schemas**. The cTools Manage
Schemas page appears.

3 Click the applicable feature area [p. 474]. The Manage Schema
Properties page appears.

4 Under **Schema name**, select the applicable custom schema.

5 In the Actions menu, click **Edit Schema**. The Add/Edit
<Extension or Child> page appears.

6 Click **Apply Pending Changes**.

7 Click **Save**.

Publishing custom pages and saving to the database

When the customization of panels and fields on custom pages is complete,
and pending changes have been applied for the associated schema, stop the
PowerSchool SMS Task Manager [p. 519] and apply pending changes to save
the pages to the database [see also *Displaying custom schemas and pages*
p.517]. If customization is occurring in a production environment, complete
this process during off hours so as not to disrupt the system.

Clicking **Apply Pending Changes** applies all changes for the selected page
and for any other panels and fields that depend on it. For example, applying
pending changes while on the Manage Page Details page saves changes to
that page and changes to its associated panels and fields.

To apply changes to a single panel only, open the panel from the Add/Edit
Page page and click Apply Pending Changes on the Add/Edit Panel page.

To publish and apply pending changes for a custom page [DA[2]
]:

1 In the **Admin** menu, click **District Setup**.The District Setup
page appears.

---

[1]You can do this if your role is District Administrator.
[2]You can do this if your role is District Administrator.

2 Under **cTools**, click <u>Manage Pages</u>. The cTools Manage Pages page appears.

3 Click the applicable feature area [p. 474]. The Manage Page Details page appears.

4 Under **Custom Pages**, click the relevant page. The Add/Edit Page page appears.

5 Click **Apply Pending Changes**.

Resetting the Internet Information Server (IIS)

When custom schemas and pages are added to PowerSchool SMS, changes to the database are also updated as metadata [p. 489]. This metadata is cached on the web server. In order to see the changes, reset the Internet Information Server (IIS) to refresh the cache. If customization is occurring in a production environment, complete this process during off hours so as not to disrupt the system.

To reset IIS [DA[1]]:

1 Log off from PowerSchool SMS.

2 On your web servers, in the Start menu, click **Run**. The Run dialog appears.

3 For **Open**, enter "iisreset".

4 Click **OK**.

Starting the PowerSchool SMS Task Manager

Once customization of PowerSchool SMS is complete, restart the PowerSchool SMS Task Manager. System performance may be slow for a period of time after the restart, as the View Generator task will be running to update the data access views based on the changes made to PowerSchool SMS.

To start the task manager [DA[2]]:

1 From the Start menu, click **Settings > Control Panel > Administrative Tools > Services**.

2 Right-click **PowerSchool SMS Task Manager Service**.

3 In the menu, click **Start**.

Understanding custom Extension schema searches

When a District Administrator adds a field to a schema, that field is automatically added to the search functionality [p. 37], allowing users to search the custom data. Where the custom fields in a custom Extension schema [p. 489] are accessible in a search control depends on whether the custom Extension schema was created from a Built-in or Child schema.

If the custom Extension schema was created from a Built-in schema, when the user selects the "Generic" category on the **Detail** tab of the search control, the fields in the Extension schema are available from the second drop-down list.

---

[1]You can do this if your role is District Administrator.
[2]You can do this if your role is District Administrator.

If the custom Extension schema was created from a Child schema, the Child schema name appears in the **Category** field on the **Detail** tab of the search control. When the user selects the Child schema from the Category drop-down list, the Extension schema fields become available for selection.

Searching custom list items

Setup list and Collection field types reference a setup list with multiple list items [see *: Data type/control type combinations:* p.511]. Users can build search criteria based on the list items in a custom Setup List or Collection type field.

When a District Administrator defines a field that has a data type of Setup List or Collection for a custom schema, he or she selects the setup list to reference [p. 494]. When users select that field in a search control, the list items appear and users can choose to search for one or more items [p. 523].

When users search for data in a field that references a setup list, in addition to standard operators (for example, greater than, less than, equal to, and so on) the following four operators are available:

- includes
- excludes
- exists
- does not exist

How the search operators work when the user is searching custom fields depends on whether or not a default search field has been selected for the schema, as follows:

If the District Administrator has designated a field as the default search field, the search operators produce the following search results for users:

- "Includes": Displays records that contain the selected setup list item in the setup list field that was specified as the default search field. Multiple list items can be selected using Ctrl+click see *Selecting multiple search criteria in a custom schema* [p. 523].
- "Excludes": Displays records that do not contain the selected setup list item in the setup list field selected as the default search field. Multiple list items can be selected using Ctrl+click see *Selecting multiple search criteria in a custom schema* [p. 523].
- "Exists": Displays records where there is any setup list item in the specified default search field.
- "Does not exist": Displays records where no list items have been entered in the specified default search field.

If the District Administrator has not selected a default search field, the search operators "includes" and "excludes" are not available. The available search operators will produce the following search results:

- "Exists": Displays records in which the custom schema being searched contains the specified data in any setup list field.
- "Does not exist": Displays records that do not contain the data in any setup list field in the custom schema.

Selecting multiple search criteria in a custom schema

If a user wants to search a custom Extension schema using multiple criteria, the default search field [p. 521] must be selected. In addition, the user must select the **Match** option "Any Criteria" (the "OR" logical operator) to get results.

When users select multiple custom field list items for their search criteria, the logical operator "OR" is always used. In the example below, the search results will consist of student records in which the custom setup list field "Exceptionality" contains the list item "Deaf" **OR** "Hearing Impaired" **OR** "Speech Impaired" [*Figure 201*].

Figure 201: Selecting multiple search criteria
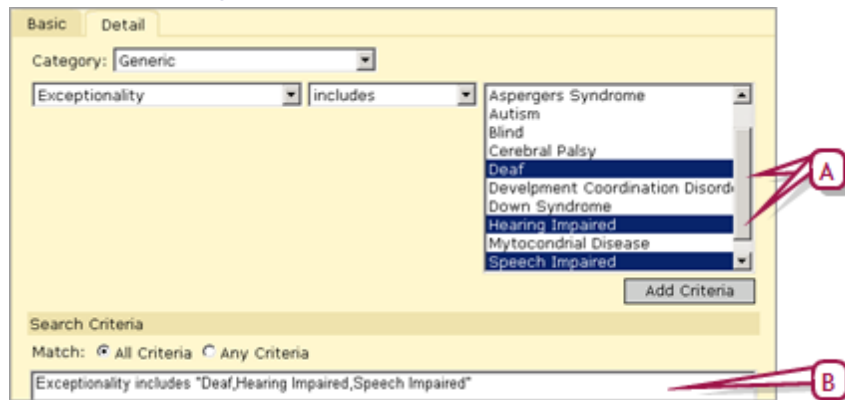
A To select more than one search criterion, press `Ctrl` and click.

B Search criteria are separated by the logical operator "Or".

When users combine search criteria for a field with a data type [p. 500] of Setup List or Collection with search criteria for a field of any other data type, the Match option "All Criteria" acts as an "AND" logical operator and "Any Criteria" acts as an "OR" logical operator.

Sharing customizations

Changes made through customization functionality are portable between different installations of PowerSchool SMS using files called a *Customization Package* (also known as a *cTools Package*). This portability enables a District Administrator to create or enhance a customization in a development environment and test it before applying that customization to a production environment. Alternatively, a third-party developer could customize a Chancery SMS system, create a package, and email it to a district for application to its system. In just a few minutes, the District Administrator can install the package and start using the customized features. Similarly, developers can enhance a customization and send a new package to a district to install during the school year, without affecting that district's data.

A Customization Package includes custom setup lists, setup list pairs, schemas, fields, panels, and pages, and is forward-compatible with new

versions of Chancery SMS. However, a Customization Package for a new release cannot be installed on an older version of the software.

If the creator of a custom schema and pages has an *owner key* file [p. 473] on his or her computer to restrict changes to the customizations, when the creator builds a Customization Package, any customizations without an owner key are tagged with the creator's owner key. If the creator of a Customization Package does not have an owner key on their computer, when they create a package, any customizations tagged with someone else's owner key are not included in the package.

Table 81: **Permissions pertaining to working with Customization Packages**

To	You need this permission	Set to	Details
Create a custom package	**District > Create Customization Package**	Yes	[p. 640]
Install a custom package	**District > Install Customization Package**	Yes	[p. 650]

Viewing an installed Customization Package

If the District Administrator has installed one or more Customization packages, information about the packages appears on the Install Customization Package page. PowerSchool SMS creates the file name of a Customization Package automatically. You can control the package numbers and build numbers, but PowerSchool SMS prevents errors by ensuring that you increment these numbers [p. 527].

To view installed packages:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.

2 Under **cTools**, click **Install Customization Package**. The Install Customization Package page appears.

3 View the following information:
   - **Package name**: The file name of the package, which includes the package name, the PowerSchool SMSversion number, the package number, and the build number [*Figure 202*].
   - **Date created**: The date the package was created.
   - **Description**: A description of the package.
   - **Status** [p. 527]: The current status of the package. Possible statuses are:
     - "In Progress": the package is currently being installed.
     - "Completed": the package was installed successfully.
     - "Failed": errors were detected during the installation of the package.
     - "Incomplete": the installation has not completed successfully.
   - **Install date**: The date the package was installed into Chancery SMS.

4 Click **Cancel**.
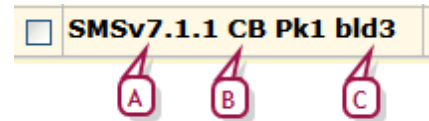
A   Chancery SMS version number, which is the version of
    Chancery SMS in which the package was created. This file
    name is generated by the system and cannot be change.
B   The Customization Package version number. This number
    must be equal to or greater than the last package created.
C   The package build number represents the number of times a
    package has been created. This number must be greater
    than the build number of the last created package. When
    you increment the package number [p. 525], set the build
    number to 1.

Creating a Customization Package

You can create two types of Customization Package: *full* or *partial*.

A full package includes:

- All schemas, pages, panels, and fields.
- Elements built with Custom Data Management (Student Data),
  including setup lists.
- All custom setup list pairs and setup list pair items.
- Information about the environment in which the package was
  created.
- Information about all dependencies, such as other packages.

A partial package includes:

- Only the changes since the last successful creation of the selected
  package.
- Information about the environment in which the package was
  created.

When you create a Customization Package, PowerSchool SMS creates seven
files. The file names are preceded by "SMSv" "Pk" "bld", and followed by the
package number and build number [*Figure 202*]. The file location is
predefined—PowerSchool SMS saves the files to the following folder on the
PowerSchool SMS database server:
c:\Inetpub\wwwroot\ChancerySMS\CustomizationPackage\CreatePackage.

The seven files created are:

- **CDM.sql**: Contains the Custom Data Management (Student Data)
  customizations.
- **cToolsPackageSummary.xml**: Contains summary information, such
  as version, build number, etc., for the current package.
- **SchemaManager.xml**: Contains the custom extension and child
  schemas.
- **UIManager.xml**: Contains the custom pages, panels, and fields.

- **SetupListData.xml**, **SetupListPairData.xml**, and **SetupListPairJoinData.xml:** Contain all custom setup lists, setup list pairs, and list items.

If client validations [p. 513] have been created, PowerSchool SMS also creates a "ScriptFiles.zip" file. This file contains the script files for the validations.

Warning: To maintain the locked [p. 473] status of a Customization Package, do not make edits directly in any of the following three files:

- **SchemaManager.xml**
- **UIManager.xml**
- **cToolsPackageSummary.xml**

If changes to any of these file are detected during installation, PowerSchool SMS does not install the package.

Packages include only customizations where pending changes have been applied [p. 517]. If you created or changed a schema, field, or panel without applying the changes, a warning appears when you create a package. Stop the creation of the package and apply the pending changes or create the package without the changes.

Report customizations are not included in Customization Packages. Reports are uploaded through a different mechanism [p. 136].

To create a Customization Package [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears

2 Under **cTools**, click <u>Create Customization Package</u>. The Create Customization Package page appears.

3 Under **Create New Package**, enter or view the following information:
- **Date created**: Defaults to today's date.
- **Version**: The version of PowerSchool SMS on which the package was created.
- **Created by**: If an owner key [p. 473] exists, it appears in this field. If an owner key does not exist, the district number appears in this field.
- **Package #**: If this is the first customization, leave the package number as the default of "1". If this is a subsequent package and the customizations have changed significantly since the previously created package, increment the package number by one or, if the changes are not significant leave the default value, which is the same as in the last package.
- **Build #**: If you incremented the package number, enter "1". If you used the default **Package #**, leave the default value for the build number (the default value is one greater than the build number in the last package).
- **Description**: A description of the package.
- **Status** [p. 527]: When you click Create Package, this field displays the package creation status. Statuses are:

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[1]You can do this if your role is District Administrator.

- In Progress
- Package creation complete
- Completed
- Fail
- **Package mode**:
  - **Full**: Package includes the entire schema and all pages, along with their associated hierarchy structure.
  - **Partial**: Package contains only the changes since the last successful creation of the selected package. If you select partial, select the previous package created from the "Changes Since" drop-down list.

4 Click **Create Package**. The status updates to "In Progress". One of the following occurs:
- If errors occur, a message appears with an explanation of the failure. Click **OK** and the status updates to "Fail".
- If the package is created successfully, a "Package creation complete" message appears. Click **OK.** The status updates to "Completed" and the grid under **Summary** is updated.
- If a message warns you that any unapplied pending changes will not be saved, click **OK** to proceed with the package creation or click **Cancel** to stop the package and find and apply changes [p. 517].
- When the customization is created successfully, the files are saved to: *c:\Inetpub\wwwroot\PowerSchoolSMS\CustomizationPackage\ CreatePackage*.

Installing a Customization Package

During the installation of a Full [p. 525] package, the entire schema and all page elements along with their associated hierarchy structure are included. If the required structure is not detected on the computer during installation, the structure is added. For example, when the District Administrator adds a custom schema and creates a Full package, if the computer on which he or she installs the package does not have the built-in schema on which the new custom schema is based, PowerSchool SMS adds the required schema and the package installs successfully.

During the installation of a Partial [p. 525] package, only the changes since the last successful creation of the selected package are installed; therefore, not all custom schema and page elements are included. During installation of a Partial package, if the required structure does not exist on the target computer, PowerSchool SMS cannot install the partial package and an error message appears.

Note: Information about the environment in which a package is created is included in both Full and Partial Customization packages. The District Administrator should check this information and ensure the environment in which he or she is installing the package is compatible with the package being installed see *Pre-checks and troubleshooting* [p. 529].

If errors are detected during the installation of the SchemaManager.xml, the schemas that can be installed are installed and errors are logged for the schemas that cannot be installed see *Pre-checks and troubleshooting* [p.

529]. When the process is finished, installation of the UIManager.xml file does not commence. The status of the installation is set to Incomplete.

If errors are detected during the installation of UIManager.xml, the interface properties that can be installed are installed and errors are logged for the properties that cannot be installed. The status of the installation is set to Incomplete. If no errors are detected during the installation of UIManager.xml, the installation status is set to Complete.

A Customization Package for a localized database (for example, a state-specific localization) can be installed in two ways: either directly by the PowerSchool SMS installer when you upgrade to a new version of PowerSchool SMS, or by manually installing the package through PowerSchool SMS [p. 528].

Installing the package

Packages should be installed during off-hours, as you will need to stop and restart the PowerSchool SMS Task Manager and reset the IIS to complete the process, both of which will interrupt use of PowerSchool SMS.

Installing a Customization Package involves the following steps:

1 Stopping the Task Manager [p. 519].
2 Installing the Package [p. 528].
3 Restarting the Task Manager [p. 521].
4 Resetting the IIS [p. 521].

To install the package [DA[1]]:

1 On the PowerSchool SMS database server, copy the customization files from
   c:\In-etpub\wwwroot\P-owerSchoolSMS\CustomizationPackage\CreatePackage to
   c:\Inetpub\wwwroot\PowerSchoolSMS\CustomizationPackage
   on any web server or on the database server.
2 Sign in to PowerSchool SMS.
3 In the **Admin** menu, click **District Setup**. The District Setup page appears.
4 Under **cTools**, click **Install Customization Package**. The Install Customization Package page appears.
5 Under **Install New Package**, click **Browse** and navigate to the folder *c:\Inetpub\wwwroot\ChancerySMS\CustomizationPackage*.
6 Select the package file, and click **Open**.
7 If the file is a valid package, the following information appears:
   • **Package name**: The name entered when the package was created. Chancery SMS gets this value from the package [p. 525].
   • **Date created**: The date the package was created. Chancery SMS gets this value from the package.

---

[1]You can do this if your role is District Administrator.

- **Description**: The description entered when the package was created.
- **Status**: The status of the package installation.

8 Click **Install New Package**.

- If the installation is successful, "Completed" appears in the Status column.
- If the installation is not successful, "Failed" or "Incomplete" appears in the Status column. To troubleshoot the installation issue, see *Pre-checks and troubleshooting* [p. 529]. To reinstall the package, see *Re-installing a package* [p. 529]. You may need to delete or rename some of your existing customizations to allow the package to install successfully.
- If the message "Package installation denied. The packaged files have been tampered with. Direct editing of these files is strictly prohibited" appears, this means changes have been made directly in the SchemaManager.xml, UIManager.xml, or cToolsPackageSummary.xml files. The Customization Package will need to be re-created and re-installed.

Pre-checks and troubleshooting

Use the PowerSchool SMS *Customization Package Installation Log* to perform an environment pre-check before installing a package, and to troubleshoot incomplete and failed package installations. The Customization Installation Log records information about the package being installed—such as date of creation and package type—as well as information about any other packages present in the environment when the custom package was created. The log also performs a pre-check when a District Administrator installs a Partial package to ensure all dependencies exist on the computer on which the Partial package is being installed.

To view the Customization Package Installation Log [DA[1]]:

On the Install Customization Package page, in the **Status** column, click a link.

OR

1 Navigate to *c:\inetpub\wwwroot\PowerSchoolSMS\CustomizationPackage*.
2 Double-click **InstallPackage**.

Re-installing a package

If you were unable to successfully install a package (that is, the installed package has a status of Failed or Incomplete), you can reinstall it. Check the error log [p. 529], make the necessary adjustments to the package, and then re-install the package.

To re-install a package [DA[2]]:

1 In the **Admin** menu, click **District Setup**. The District Setup

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[1]You can do this if your role is District Administrator.
[2]You can do this if your role is District Administrator.

page appears.

2   Under **cTools**, click <u>Install Customization Package</u>. The
    Install Customization Package page appears.

3   Select the package you want to reinstall.

4   In the Actions menu, click **Install Existing Package**.

5   Click **OK**.

PowerSchool SMS Optional package

Some built-in panels in PowerSchool SMS are unlocked [p. 473] and can be modified by users [*Table 82*, p.531]. For new customers, these panels are available in an *Optional package*, that can be installed if required. For existing customers who have upgraded from PowerSchool SMS versions prior to version 6.7, these pages and panels are automatically in the application.

If you are installing PowerSchool SMS 6.7 or higher, on the first install of the system PowerSchool SMS copies the Optional package to the *csl\cToolsPackage\US\Optional* folder on the database server. Review the items in [*Table 82*, p.531] to determine whether your district requires the pages and panels listed; if so, follow the installation instructions below.

To install the Optional package:

1   On the database server, navigate to *csl\cToolsPackage\US*.

2   Double-click the Optional folder.

3   Copy the **cToolsPackage_USOptional.zip** file.

4   Navigate to
    c:\Inetpub\wwwroot\PowerSchoolSMS\CustomizationPackage.

5   Paste the **cToolsPackage_USOptional.zip** file.

Feature Area	Pages (Locked)	Panels
Program Management	Program Profile - Academic Enhancement	Program Information
	Program Profile - After School Academic	Program Participation
	Program Profile - After School Athletics	Program Information
	Program Profile - Early Childhood Education	Languages ECE Setting Family Information Household Information
	Program Profile - English Language Learners	Languages ELL Setting Parent/Guardian Status
	Program Profile - Free & Reduced Meals	Meal Specifics Household Information
	Program Profile - Gifted and Talented	Program Information
	Program Profile - Home Hospital	Episode Information
	Program Profile - Homeless	Status Information Dwelling Information Services
	Program Profile - Migrant Status	Qualifying Information Services
	Program Profile - Out of District Placement	Special Service Information Placement Information
	General Info	Instructional Time Interaction with Other Programs
	Program Setup Summary	Program Funding Program Student Costs
	Session Details	Assign to Off-Campus Facilities
School Info	School Information	Cities Associated With School School Alternates
Student Behavior	Add/Edit Action	Issue Management Plan
	Goal Details	Goal Details Progress Team Details Intervention Details
	Intervention	Intervention Details Progress Details
	Progress Details	Intervention Progress Details
	Progress Team Details	Progress Team Details
	Additional Incident Details	Time Details Incident Details

Feature Area	Pages (Locked)	Panels
Student Demographics	Background Data	All panels
	Federal Info tab	Languages

Appendices

- *PowerSchool SMS Report Package reports* [p. 533]
- *PowerSchool SMS built-in reports* [p. 594]
- *Daily attendance code calculation rules planning worksheets* [p. 615]
- *Permissions catalog* [p. 619]
- *Permanent Record* [p. 807]

PowerSchool SMS Report Package reports

Administration Reports

Address Out of Zone

In a district using Address Validation, use this report to identify students registered in out-of-zone schools. The report displays the student's name, Student ID, Grade, and Zoned School, as well as the Exception Reason [*Figure 203*].

Figure 203: Address Out of Zone Report results sample

Address Out of Zone Report

Chancery School District

2007 - 2008

Arlington High School — Students: **1**

Student Name	Student ID	Grade	Zoned School	Exception Reason
Beams, Casandra	10042635	12	Crystal High School	Family Issue

Collins High School — Students: **2**

Student Name	Student ID	Grade	Zoned School	Exception Reason
Winters, Jonathan	000036	11	Panorama High School	International Student
Lucian, Doyle	10020334	9	Crystal High School	International Student

Crystal High School — Students: **4**

Student Name	Student ID	Grade	Zoned School	Exception Reason
Bow, Dorian	10461896	8	Bloomfield Middle School	Family Issue
Braud, Grady	10461045	8	Bloomfield Middle School	International Student
Cannady, Janet	10461819	8	Bloomfield Middle School	International Student
Gallardo, Book	10461655	8	Bloomfield Middle School	International Student

Report options include:

- **Hide Inactive Students**

PowerSchool SMS List of Reports

Refer to *Managing reports* [p. 124]. Note: To run any report in the PowerSchool SMS Report Package, you must upload the PowerSchool SMS List of Reports. This report contains a shared stored procedure used by all report package reports.

Enrolled Students Not Projected

This report displays students who are enrolled in a district school but for whom no enrollment is projected [p. 151] for the next year, that is, the system does not specify a district school to which PowerSchool SMS will transfer the student during Year-End Processing [p. 450]. Enrolled students are those who set to be retained or promoted, are active on the last day of a school's active calendar, but are not in the district's graduating grade level and are not subject to withdrawal after the last day of the school's active calendar [p. 141]. The report results will also include the following:

* A student who has requested a particular school but does not have a district approval (in a district where approval is required).
* A student who has a pending or promoted status, is in a non-graduating grade level, and is a participant in a single program session [p. 88] at a school and that program session is set to not roll over and the program session is set to withdraw the student.

The report displays the student's name, Student ID, and Grade [*Figure 204*]. It is useful for a District Administrator prior to running Year-End Processing. A School Administrator can run the report for his or her school. It enables the administrator to ensure that every student has a projected school. A link to this report appears on the District-Level Checklist section of the Year-End Processing Pre-Check page.

Figure 204: Enrolled Students Not Projected sample results

Enrolled Students Not Projected Report
Chancery School District

School Name: Crystal High School

Student Name	Student ID	Grade
Welsh, @SG-Tammy Jack	D 000035	8

Total Number of Students not Projected: 2

School Name: Panorama High School

Student Name	Student ID	Grade
Welsh, @SG-Tammy Jack	D 000035	12

Total Number of Students not Projected: 2

Attendance Reports

Daily Absence by Period

For schools using secondary scheduling, this report lists all students for a given date range who have a non-present attendance code [*Figure 205*].

Daily Absence Report by Period

Chancery High

For the period of 7/4/05 to 5/1/06

ABSENCE DATE: 12/13/2005

Period (Class Name)	Teacher Name (Number)	Student Name (Number)	Absent/Tardy
P7 (Ancient Civilizations-5)	Hartman, Doug(T-5183)	Brody, Greg (9999016707)	AE

A   **Period (Class Name):** The results are listed in order of period.

Daily Absence by Attendance Code

For schools using secondary scheduling, this report lists all students for a specified date range who have a non-present attendance code [*Figure 206*].

Figure 206: Daily Absence by Attendance Code report sample results

Daily Absence Report By Attendance Code

Chancery High

For the period of 7/4/05 to 5/1/06

ABSENCE DATE: 9/22/2005

Attendance Code	Description	Student Name (Number)	Period (Class Name)	Teacher Name (Number)
T	Tardy Unexcused	Brody, Greg (9999016707)	P1 (Algebra 2-2)	Cavein, Tich A(2)
		Brody, Greg (9999016707)	P2 (French - Advanced-1)	DeGaulle, Antoinette(T-5204)
		Brody, Greg (9999016707)	P3 (Business Ethics-3)	Harrison, John P(7)
		Brody, Greg (9999016707)	P4 (Chemistry-2)	Einstein, Albert(T-5184)

A   **Attendance Code:** The results are grouped by code.

Period Attendance

This report summarizes student attendance for each period broken down by attendance category (present, absent, and tardy) [*Figure 207*]. Typically, this report is used to generate a list of students who are absent unexcused and subject to follow-up action such as a call to the home. Also, a School Administrator can use the report to monitor school-wide attendance.

Figure 207: Period Attendance report sample results

A   **Attendance Totals**: Presents attendance broken down by category.

B   **Student Details**. Displays a list of students who have been assigned a particular attendance code for the selected periods.

Report options include:

- **Calculation Method**: Specifies how totals are calculated for the **Attendance Totals** section and how attendance codes are calculated in the **Student Details** section [*Figure 207*].

  Attendance code type calculation is based on the Attendance Type field for the attendance code. If the type is "Present", the present total is incremented. If the type is "Absent", the absent total is incremented. If the type is "Tardy", the tardy total is incremented. If the type is "Early Dismissal", the early dismissed total is incremented.

  Attendance code value calculation is based on the value assigned in the Attendance Value field for the attendance code. Attendance totals are calculated by summing the attendance value for each attendance code assigned to the student.

- **Report Display Options:**

  Print Attendance Details: Select this check box to have the report generate a **Student Details** section [*Figure 207*].

  Print Contact Information: Select this check box to have the Student Details section show contact information for all students in each attendance code. **Note:** This option applies only if the **Print Attendance Details** check box is selected.

  Print Attendance Code Legend: Select this check box to have the Student Details section include a description of the attendance codes. **Note:** This option applies only if the **Print Attendance Details** check box is selected.

Print Attendance Comments: Select this check box to have the Student Details section include any comments entered by the student's teacher. **Note:** This option applies only if the **Print Attendance Details** check box is selected.

Print Office Attendance Comments: Select this check box to have the Student Details section include any comments entered by the school office. **Note:** This option applies only if the **Print Attendance Details** check box is selected.

Print Unlisted Phone Numbers: Select this check box to have the Student Details section include contact phone numbers flagged as "unlisted". **Note:**This option applies only if the **Print Attendance Details** check box is selected.

- **Sort Order**: Specifies the Student Details section's listing order.

Student Cumulative Attendance

This report presents the entire personal attendance record in a specified date range for one or more students, student by student. Attendance totals can be calculated based on attendance code values or attendance code types.

Figure 208: Student Cumulative Attendance Summary By Type report sample results

Student Cumulative Attendance Summary By Type

Crystal High School

Reporting date: August 15, 2004 - December 07, 2004

NOTE: Totals are calculated by attendance code Type.
This report contains unsubmitted attendance data.

Albert, Garry
Student ID: 10461223   Grade Level: 11   Track: Homeroom: N/A   Date of Birth: October 03, 1987   Gender: Male

Daily Attendance Summary

	1	2	Total
Attendance days	37	42	79
Days enrolled	37	15	52
Present	37	14	51
Tardy excused	0	0	0
Tardy unexcused	0	0	0
Absent excused	0	0	0
Absent unexcused	0	1	1

	1	2	All
Highest # consecutive exc. tardies	0	0	0
Highest # consecutive unexc. tardies	0	0	0
Highest # consecutive exc. absences	0	0	0
Highest # consecutive unexc. absences	0	1	1
Average daily attendance	1.00	0.93	0.98

Class Summary

Class	Present	Tardy Excused	Tardy Unexcused	Absent Excused	Absent Unexcused
CRD-Mathematics-1T-1	54	1	0	0	0
CRD-Chemistry-1T-1	54	0	0	1	0
CRD-English-1T-1	54	0	0	0	1
CRD-History-1T-1	53	2	0	0	0

A Student
B **Daily Attendance Summary**: Summarizes the student's attendance codes during the specified date range.
C **Class Summary**: Summarizes the student's attendance codes by class in which the student was enrolled.
  Note: The optional **Attendance Exception Details** section is not shown. This section summarizes the student's attendance on exception days.

Report options include:

- **Calculation Method**: Specifies how totals are calculated for the **Attendance Totals** section and how attendance codes are calculated in the **Student Details** section [*Figure 207*].

  Attendance code type calculation is based on the Attendance Type field for the attendance code. If the type is "Present", the present total is incremented. If the type is "Absent", the absent total is incremented. If the type is "Tardy", the tardy total is incremented. If the type is "Early Dismissal", the early dismissed total is incremented.

  Attendance code value calculation is based on the value assigned in the Attendance Value field for the attendance code. Attendance totals are calculated by summing the attendance value for each attendance code assigned to the student.

- **Report Display Options:**

  Start New Page for Each Student: Select this check box to have each student's information start on a new page [*Figure 207*].

  Print Class Attendance Summary: For schools using class attendance, select this check box to include a **Class Summary** section, which displays attendance totals based on period attendance codes rather than daily attendance codes [*Figure 207*]. If a student transferred classes during the selected period, only the class transferred into (not the class transferred from) is included in the report.

  Print Attendance Details: Select this check box to include an **Attendance Exception Details** section.

  Print Attendance Code Legend: Select this check box to include in the **Student Details** section a description of the attendance codes. **Note:** This option applies only if the **Print Attendance Details** check box is selected.

  Print Teacher Attendance Comment: Select this check box to include in the **Student Details** section any comments entered by the student's teacher. **Note:** This option applies only if the **Print Attendance Details** check box is selected.

  Print Office/Administrator Attendance Comment: Select this check box to include in the **Student Details** section any comments entered by the school office. **Note:** This option applies only if the **Print Attendance Details** check box is selected.

Teacher Attendance Verification

For a specific Teacher, this report lists all students assigned non-present attendance codes during a specified date range [*Figure 209*].

Teacher Attendance Verification Report

Chancery High

For the period of 7/4/05 to 5/1/06

TEACHER: DeGaulle, Antonette(T-5204)

Date	Class Name (Period)	Student Name (Number)	Absent/Tardy
8/19/2005	French - Advanced-2 (P1)	Aikens, Charlene (9900839686)	AE
9/22/2005	French - Advanced-1 (P2)	Brody, Greg (9999018707)	T
10/3/2005	French - Intermediate-1 (P4)	Acevedo, Amanda M (9901399291)	AA
4/13/2006	French - Advanced-2 (P1)	Aikens, Charlene (9900839686)	AP
4/17/2006	French - Advanced-2 (P1)	Bernard, Jesse C (9901254474)	A

Verify that the above absences are correct for the specified dates.

Signed: _____ Date: _____

A Absences: Listed in order of date, from the oldest to the most recent.
B Signature line: Enables the Teacher to confirm the report's accuracy.

Unsubmitted Attendance by Period

This report lists all classes on a specific date for which the "Submit for teacher" check box is not selected [*Figure 210*].

Figure 210: Unsubmitted Attendance by Period report sample results

Unsubmitted Attendance by Period

Chancery High

Reporting Date: Monday, May 8, 2006

Period: Period 1

Class	Course	Teacher	Room
Algebra 2-2	Algebra 2	Cavein, Tich A	104
Biological Science-1	Biological Science	Bernoulli, James	200
Business Internship-2	Business Internship	Harrison, John P	115
Business Internship-3	Business Internship	Rickel, Sandy	122
French - Advanced-2	French - Advanced	DeGaulle, Antonette	106
Freshman English-1	Freshman English	Becker, Paul	101
German - Intermediate-1	German - Intermediate	Donaldson, Ann	109
Life Science-3	Life Science	Pauling, Linus	103
Physical Education - Middle -4	Physical Education - Middle School	Thorpe, James	700
Physical Science-2	Physical Science	Newton, Issac	202
Pre Algebra-2	Pre Algebra	Fitts, Robert	111
Sets & Lighting-2	Sets & Lighting	Giannelli, Tom	400
Spanish - Intermediate-2	Spanish - Intermediate	Johnson, Cheryl	117
Trigonometry/Pre-Calculus-3	Trigonometry/Pre-Calculus	Wallace, Mike	125
US History - 1945 to present-4	US History - 1945 to present	Rooney, Andy	123
World Cultures & Geography-1	World Cultures & Geography	Amess, James	100

Period: Period 2

Class	Course	Teacher	Room
Advanced Placement Calculus-2	Advanced Placement Calculus	Fitts, Robert	111
Advanced Placement English-2	Advanced Placement English	Wilson, Brenda	127
Algebra 2-3	Algebra 2	Duchesne, Yanick	110
American History-1	American History	Bush, George W	128
Ancient Civilizations-2	Ancient Civilizations	Amess, James	100
Art Exploration - MS-2	Art Exploration - MS	Batt, Wilma	600

A **Period**: The results are grouped by period.
B **Class**: Listed in alphabetical order.

Unsubmitted Attendance by Teacher

This report lists all classes on a specific date for which the Teacher has not submitted attendance, that is, the "Submit for teacher" check box is not selected [*Figure 211*]. The report encompasses any class on the specified date that is complete or in progress when the report is run; a class scheduled for later in the day is excluded.

Figure 211: Unsubmitted Attendance by Teacher report sample results

Unsubmitted Attendance by Teacher
Chancery High

Reporting Date: Monday, May 8, 2006

Arness, James

Period	Class	Course	Room
Period 2	Ancient Civilizations-2	Ancient Civilizations	100
Period 1	World Cultures & Geography-1	World Cultures & Geography	100

Batt, Wilma

Period	Class	Course	Room
Period 2	Art Exploration - MS-2	Art Exploration - MS	600

Becker, Paul

Period	Class	Course	Room
Period 1	Freshman English-1	Freshman English	101
Period 2	Sophomore Reading-2	Sophomore Reading	101

Bennett, Albert

Period	Class	Course	Room
Period 2	Trigonometry/Pre-Calculus-1	Trigonometry/Pre-Calculus	102

Unsubmitted Attendance

This report lists students with unsubmitted attendance [*Figure 212*], including attendance recorded for a date in the past then cleared later.

Figure 212: Unsubmitted Attendance report sample results

Unsubmitted Attendance
Arlington High School

Date: March 3, 2006 12:34 pm

Period	Teacher Name	Class Name	Course Name	Room	# of Students
A	Adair, Rodolfo	Algebra PRE-1	Algebra PRE	105(1)	30

Grading Reports

Cumulative GPA

This report lists GPA scores by student [*Figure 213*]. You can use this report to verify cumulative GPA values and check for unexpected results. **Note:** This report has two versions: one for Permanent Record (PR) environments and one for other environments. The PR version use data from a combination of existing historical tables and new permanent record tables.

Figure 213: Cumulative GPA Report sample results

Cumulative GPA Report
Panorama High School

Sort Order: By student last name within grade level
Legend: * Indicates inactive student, GPA 1 = 01_Cum_Un_GP_TotPotCr (Mar 24, 2005), GPA 2 = 02_Cum_Un_NV_TotPotCr (Mar 24, 2005), GPA 3 = 03_Cum_W_GP_TotPotCr_Adj (Mar 24, 2005), GPA 4 = 04_Cum_W_NV_TotPotCr_Adj (Mar 24, 2005), GPA 5 = 05_Cum_Un_GP_TotPotCr_CE0 (Mar 24, 2005), GPA 6 = 06_Cum_Un_NV_TotPotCr_CE0 (Mar 24, 2005), GPA 7 = 07_Cum_W_GP_TotPotCr_CE0_Adj (Mar 24, 2005)

Grade: 9

Student	ID	GPA 1	GPA 1 (full precision)	GPA 2	GPA 2 (full precision)
Altamirano, Ira	11241352	2.00000	2.0000000000	75.00000	75.0000000000
Bach, Devona	11240975	2.00000	2.0000000000	75.00000	75.0000000000
Cantero, Kathi	11241463				
* Deans, Grant	11240952	1.00000	1.0000000000	58.50000	58.5000000000
Elders, Latrisha	11241459				
Fernandes, Elvis	11241338				
Goode, Sergio	11240230	0.00000	0.0000000000		
Heavner, Merlin	11241362	0.00000	0.0000000000		
Kibbe, Roxie	11241331	0.00000	0.0000000000		

Report options include:

- **Sort order**:
  By student last name within grade level [*Figure 213*]
  Descending by cumulative GPA within grade level
  Ascending by cumulative GPA within grade level
- **Include full precision cumulative GPA values:** Generates cumulative GPAs to ten decimal places. This is particularly useful for class ranking purposes.

Failing Grades Report (Secondary)

This report identifies students who are failing specific classes [*Figure 214*]. This enables a School Administrator or Teacher to identify students at risk of not graduating, or students who need assistance such as tutoring. The report is most useful at the end of a grading period, just before report cards are generated.

Failing Grades Report

Alta High School

Grading Period: Grades 9 - 12 - Quarter 2

Student Name	Number	Grade Level	Class	Teacher	Grade Item	Grade
ALBIN, BRAYDEN	900002190	10	AP Art-1	Patel, K	Final	F
Lane, Emily	9000482	10	AP Art-1	Patel, K	Final	F
					Semester Grade	F
Lipscomb, Martha A	6016728	10	AP Art-1	Patel, K	Final	F
Mackey, Darlene R	2001037	6	AP Art-1	Patel, K	Final	F
Rubble, Betty	000075	8	Jewelry I-1	Marshall, T	Course Grade	F
Smith, Norman Y	3750	10	AP Art-1	Patel, K	Final	F

Grades Verification

For secondary schools, this report gives a Teacher an overview of student grades for all students in a class roster. It presents all grade items assigned to the student for each grading period [*Figure 215*].

In the report options, there is no link between filtering by Term and filtering by Grading Period. The intent of the Term filter is to specify the classes (for example, all of a Teacher's Semester 1 classes). If you also want to show only the Grading Periods that coincide with a particular term, specify this in a separate filter.

Figure 215: Grades Verification report sample results

Indicators on the report include:

@: Indicates a narrative comment (the actual comment does not appear).

~: Indicates a manual override of a calculated grade.

*: Identifies a student who has withdrawn from the class before the last day of the class. If you specify a Grading Period filter, the asterisk appears only if the student has withdrawn before the end of the last grading period shown for the class.

Honor Roll

This report displays a list of students on a school's honor roll [*Figure 216*].

Honor Roll Report

Crystal High School

A Honor Roll		Report Card Period 3

Current year GPA > 3

Grade N/A   3 total

Student	~	Override Reason
Costas, Jerry (10042049)		
Drown, Gregorio (10040728)		
Ebling, Katelynn (10020333)		

Report options include:

- **New page for each grade level**
- **Include columns for the override indicator and reason**

Missing Grades Report (Elementary)

For elementary schools, this report identified students who are missing grading information for a specified grading period [*Figure 217*]. Typically, a Teacher or School Administrator runs this report is before report cards are generated at the end of a grading period.

Missing Grades Report

Atlantic Elementary School
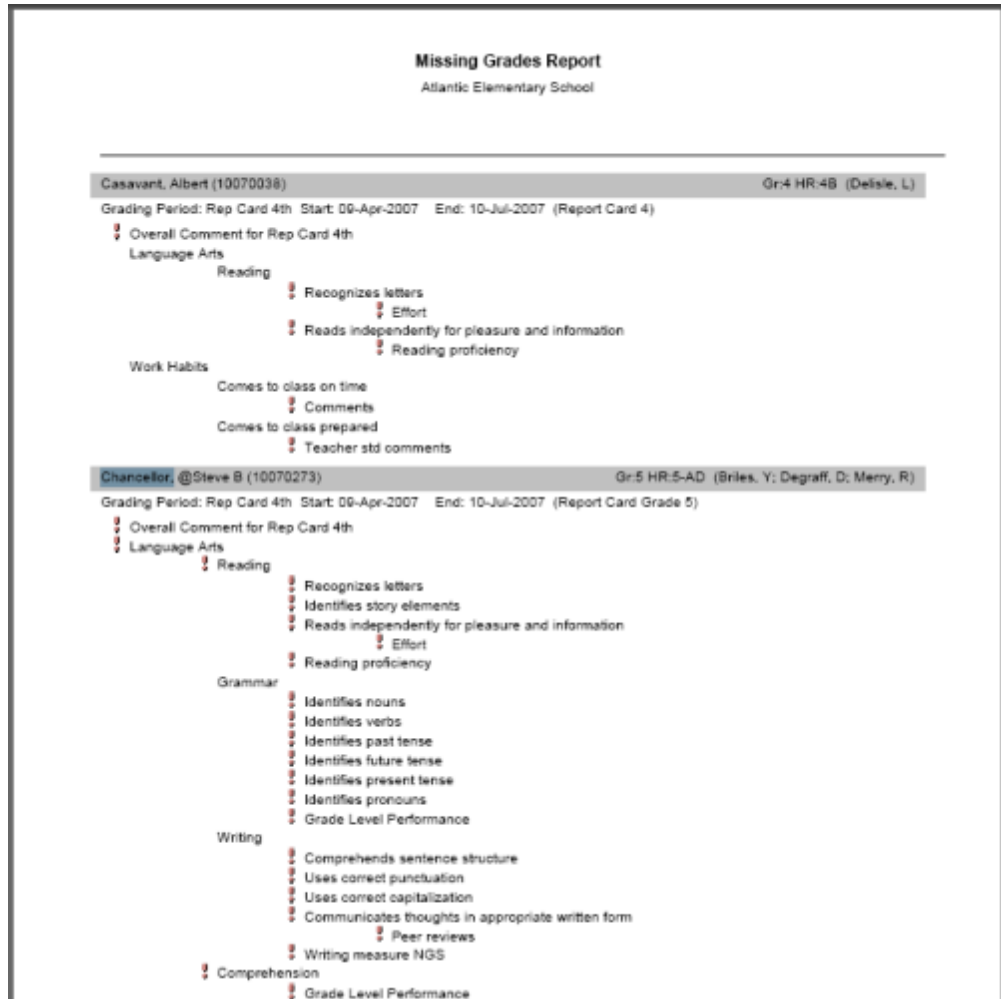
Indicators on the report include:

!: Indicates a missing grade.

Report options include:

- **Grading period:**
  Current Report Card
  Current Progress Report
  Last Report Card
  Last Progress Report
- **Sort By:**
  Homeroom, student last name: This option is most useful to a School Administrator.
  Student last name

Missing Grades Report (Secondary)

For secondary schools, this report identified students who are missing grading information for a specified grading period [*Figure 218*]. Typically, a

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Teacher or School Administrator runs this report is before report cards are generated at the end of a grading period.

Figure 218: Missing Grades Report sample results

Indicators on the report include:

*: Identifies a student who has withdrawn from or dropped the class before the last day of the class. (Where the student transferred to another class, the student's name is included for both classes and the dropped class.)

!: Indicates a missing grade.

Report options include:

- **Grading period:**
  Current Report Card
  Current Progress Report
  Last Report Card
  Last Progress Report
- **Sort By:**
  Homeroom, student last name: This option is most useful to a School Administrator.
  Student last name: The only option available to a Teacher.

Specific Grades Report

This report identifies students with specific types of grades, including special grades such as E (Exempt) [*Figure 219*]. Typically, a School Administrator or Teacher runs this report during and at the end of a grading period, just before report cards are generated.

Figure 219: Specific Grades Report sample results

Specific Grades Report

Alta High School

Selected Grading Period: Grades 9 - 12 - Quarter 2

Student Name	ID	Current Grade Level	Class	Teacher	Grade Item	Grade
Lipscomb, Martha A	6016728	10	Algebra II-1	Lopez, J	Course Grade	A
Mackey, Darlene R	2001037	6	AP Art-1	Patel, K	Course Grade	A
MELO, Mariela	900004682	9	Algebra II-1	Lopez, J	Course Grade	A
					Final	A
Smith, Norman Y	3750	10	Algebra II-1	Lopez, J	Course Grade	A
Smith, Norman Y	3750	10	AP Art-1	Patel, K	Course Grade	A

Student Academic Plan Progress Report

The report provides information about a student's assigned academic plan [p. 100]. The report shows the name of the student's counselor and the year or date the student entered 9th grade, along with the courses and required credits in the academic plan version, the student's earned and pending credits for those courses, and the student's completion status for each group of assigned courses. The report also provides a list of courses the student has taken for which the course credits will not contribute to this academic plan. PowerSchool SMS sorts this report by group and then by course priority.

Note: This report also appears in ParentConnectXP [p. 108], where it enables a student and a parent/guardian to view his or her academic plan online.

Figure 220: Student Academic Plan Progress Report

Student Academic Plan Progress Report

ARLINGTON HIGH SCHOOL

Student name: Bos, Victor   Counselor:

Student ID: 10020341   Grade: 12   Year entered 9th grade: 2004   Ⓐ

Plan version: Academic Plan Basic

Group name	Courses	Grade	Year	Required credits	Earned credits	Pending credits	Status
Academic Plan Basic				20.0	6.0	12.0	I
Core				16.0	0.0	10.0	I
Mathematics				4.0	2.0	2.0	P
	15 Calculus	12	2009		2.0	2.0	
Science				4.0	0.0	0.0	I
Humanities				4.0	4.0	0.0	C
	50 Lit Classics	12	2009		1.5	0.0	
	30200 English 11	11	2008		1.0	0.0	
	30300 English 12	12	2009		1.5	0.0	
PHE				2.0	0.0	0.0	I
Languages				2.0 OSG	0.0	0.0	I

Ⓐ Indicators on the report include:
   OSG: Indicates that credits are collected from only one sub-

group
C: All courses in the group are completed
P: Some or all of the courses in the group are in progress
I: Some or all of the courses in the group are incomplete

Report options include:

- **Rules:** Select this option to print the rules associated with this academic plan (for example, the test scores that are required to complete the plan).
- **Notes:** Select this option to print the notes entered for the student that relate to this academic plan.

Student Transcript by Subject Area

This report produces a transcript for specific students, grade levels, or homerooms in your school. This report groups transcript information by subject area [*Figure 221*]. The report includes options to display ethnicity, graduated students, current year information, and official transcripts with watermarks. By default, PowerSchool SMS sets the report filters to only the selected students. **Note:** This report has two versions: one for Permanent Record (PR) environments and one for other environments. The PR version use data from a combination of existing historical tables and new permanent record tables.

Figure 221: Student Transcript by Subject Area sample results

Report options include:

- **Display Historical As**: Determines the display format of historical grades, such as numeric, letter grade, or pass/fail. (Grades for the current year are displayed as the school recorded them.)
- **Sort Order**:
  By Course Name
  By Course Number
- **Ethnicity**:
  Print ethnic category
  Print federal ethnic category and federal race categories
- **Include Only Graduated Students**: Includes a student only if an accreditation date is entered on his or her historical page.
- **Include Current Year Info**: Generates all current year information including both the active year and the historical record with the current year date. If you select this option, the report calculates GPAs to include information for the active year. **Note:** Applies to environments other than Permanent Record.

  In a Permanent Record environment, this option is **Print Year GPA for active year if active year is included**. This generates the active-year data if either the **Last-completed report card** or the **Current report card option** is selected in the **Active year data** area of the **Permanent Record Setup** page (to exclude active-year data, select the **Do not include active year data**) check box.

  Caution: This calculation requires additional processing time and may impact system performance.
- **Print Official Transcript**: Places the text "Official" as a watermark on the transcript. Otherwise the watermark is "Unofficial" [*Figure 221*].
- **School Message**: The report includes on the transcript any message entered here; for example, "School reopens and classes start August 20".

Student Transcript by Year

This report produces transcripts for specific students, grade levels, or homerooms in your school. It groups transcripts by school year (such as 2007, 2008, and 2009) and then alphabetically by school name [*Figure 222*]. The report includes options to display ethnicity, graduated students, grades, current year information, and official transcripts with watermarks. By default, PowerSchool SMS sets the report filters to only the selected students.

Note: This report has two versions: one for Permanent Record (PR) environments and one for other environments. The PR version use data from a combination of existing historical tables and new permanent record tables.

Report options include:

- **Display Historical As**: Determines the display format of historical grades, such as numeric, letter grade, or pass/fail. (Grades for the current year are displayed as the school recorded them.)

- **Sort Order**:
  By Course Name
  By Course Number

- **Ethnicity**:
  Print ethnic category
  Print federal ethnic category and federal race categories

- **Include Only Graduated Students**: Includes a student only if an accreditation date is entered on his or her historical page.

- **Include Current Year Info**: Generates all current year information including both the active year and the historical record with the current year date. If you select this option, the report calculates GPAs to include information for the active year. **Note:** Applies to environments other than Permanent Record.

  In a Permanent Record environment, this option is **Print Year GPA for active year if active year is included**. This generates the active-year data if either the **Last-completed report card** or the **Current report card option** is selected in the **Active year data** area of the **Permanent Record Setup** page (to exclude active-year data, select the **Do not include active year data** check box).

Caution: This calculation requires additional processing time and may impact system performance.

- **Print Official Transcript**: Places the text "Official" as a watermark on the transcript. Otherwise the watermark is "Unofficial" [*Figure 222*].
- **School Message**: The report includes on the transcript any message entered here; for example, "School reopens and classes start August 20".

Health Reports

Immunization Delinquency Letter

This report produces a form letter that notifies the parent that a specific student is to be excluded from school until he or she gets proper immunizations [*Figure 223*].

Figure 223: Immunization Delinquency Letter sample results

Immunization Next Due Report

This report lists when immunization are due by student [*Figure 224*]. The report includes basic demographic information and indicates if a students is provisionally enrolled.

Figure 224: Immunization Next Due Report sample results

Immunization Next Due Report

Oceanview High School

Student Name	Student ID	Birthdate	Age	Grade	Gender	Prov. Enroll	Immunization	Action	Action Date	Next Due
Alberts, Johanna	11330506	04/01/1990	15	9	F	Yes	DTP / DTaP	N/A		9/30/1990
							Hepatitis B	N/A		3/31/2000
							Measles	N/A		3/31/1997
							Mumps	N/A		3/31/2002
							Polio	N/A		5/31/1990
							Varicella	N/A		3/31/1997
Aldape, Carmen	11060574	12/04/1990	15	9	M	Yes	DTP / DTaP	N/A		6/3/1991
							Hepatitis B	N/A		12/3/2000
							Measles	N/A		12/3/1997
							Mumps	N/A		12/3/2002
							Polio	N/A		2/3/1991
							Varicella	N/A		12/3/1997
Alday, Randall	11210057	09/26/1989	16	10	M	Yes	DTP / DTaP	N/A		3/25/1990
							Hepatitis B	N/A		9/25/1999
							Measles	N/A		9/25/1996
							Mumps	N/A		9/25/2001
							Polio	N/A		11/25/1989
							Varicella	N/A		9/25/1996
Alderman, Caroll	11200673	03/08/1987	18	12	F	Yes	DTP / DTaP	N/A		9/7/1987
							Hepatitis B	N/A		3/7/1997
							Measles	N/A		3/7/1994
							Mumps	N/A		3/7/1999
							Polio	N/A		5/7/1987
							Varicella	N/A		3/7/1994

Immunization Non-Compliance Report

This report lists the students who have not complied with immunization requirements [*Figure 225*]. The report shows the due date of the next immunization and indicates if a student is provisionally enrolled.

Figure 225: Immunization Non-Compliance Report sample results

Immunization Non-Compliance Report

Oceanview High School

Immunization Type: DTP / DTaP

Student Name	Student ID	Birthdate	Age	Grade	Prov. Enroll	Scheduled Due Date
Bemis, Aline	11210229	04/13/1989	16	10	Yes	10/12/1989
Bendel, Sherita	11210751	08/23/1989	16	10	Yes	12/22/1989
Benzing, Lory	11060797	11/16/1990	15	9	Yes	5/15/1991
Bequette, Mack	11060654	12/16/1989	16	10	Yes	6/15/1990
Berens, Senaida	11200223	11/10/1988	17	11	Yes	5/9/1989
Berger, Carla	11060691	03/31/1990	15	9	Yes	9/29/1990
Bergerson, Karri	11210483	11/10/1989	16	10	Yes	5/9/1990
Bergman, Ethan	11330696	09/11/1990	15	9	Yes	3/10/1991
Berkman, Elenor	11330563	06/06/1989	16	10	Yes	12/5/1989
Berlanga, Barabara	11210230	05/06/1989	16	10	Yes	11/5/1989
Bernardini, Chong	11330146	11/01/1990	15	9	Yes	4/30/1991
Berndt, Jerrell	11210568	07/17/1989	16	10	Yes	1/16/1990
Berta, Corinne	11210353	11/17/1989	16	10	Yes	5/16/1990
Berube, Ofelia	11330277	05/12/1989	16	10	Yes	11/11/1989
Bessey, Gertrudis	11210286	03/30/1989	16	10	Yes	9/29/1989
Bessler, Margery	11060537	08/14/1989	16	10	Yes	2/13/1990
Bester, Mariko	11201125	12/19/1987	18	12	Yes	6/18/1988

Student Health Condition Report

This report lists the health condition of each student [*Figure 226*]. It indicates if a student is receiving treatment or taking medication.

Figure 226: Student Health Condition Report sample results

Student Immunization History

This report displays a student's immunization history [*Figure 227*]. It includes demographic information about the student.

Figure 227: Student Immunization History Report sample results

Online Course Requests

Student Online Course Request Status report

This report [] lists a secondary school's students according to their online course request status [p. 108]. Secondary school administrators and counselors can use this report in the active calendar.

Figure 228: Student Online Course Request report sample output

Student Online Course Request Status

Panorama High School

Statuses for next year's requests (2012/2013)

Not downloaded

Counselor: Berry, Rasa F

Number	Name	Grade level (active)
10700398	Banister, @@Eugenio	11
001091	Zuchy, @Blaze	11
10800587	Archie, Donette	10
10700466	Ben, Antoinette	10
10800374	Addington, Jeffry	9
10810099	Bjork, Crystle	9
10800246	Boyers, Sara	8
10800239	Capps, Wilma	8

Counselor: Plant, Lola D

002115	OCR_Lambros, Darren C	11
002104	OCR_Martell, Jerri T	8

Counselor: No Counselor

003050	BFG-Tanner, @Polly S	11
003051	BFG-Rollins, @Tansy S	10

Parent/guardian approval pending

Counselor: Zephyr, Matilda M

Number	Name	Grade level (active)
001354	OCR_Smithx2, Katie L	9

Counselor approval pending

Counselor: Plant, Lola D

Number	Name	Grade level (active)
002114	OCR_O'Brien, Saoirse C	11
002200	OCR_Smith, Hayley D	11
002105	OCR_Fontana, Shanna A	9
002101	OCR_Summers, Tanisha N	8

Report options include:

- **Status**: By default, the report displays all statuses. The user can choose one or more specific statuses, including Not downloaded, In progress, Parent/guardian approval pending, Counselor approval pending, Completed.
- **Sort by**: The user can have the list of students sorted by Counselor or Grade level.

By default, the following roles have permission to run this report:

- School Administrator
- School Counselor

Student Recommended Course Verification report

This report lists a secondary school's students who have one or more courses recommended to them [p. 110]. For each student, the report displays []:

- The recommended courses no longer available
- Issues with recommended courses
- Duplicate recommendations
- Required, alternate, and elective recommended courses

Secondary school administrators and counselors at schools using secondary scheduling can use this report in the active calendar.

Student Recommended Courses Verification

Panorama High School

Recommended courses for next year (2012/2013)

Counselor: Berry, Sasha F

Name	Number	Grade level (active)
AP-Zephyr, Patricia	77001133	8

Recommended courses no longer available:

Elective	20050	Computer as a Tool	Recommended by:	Plant, Lola D

Student specific recommended course issues:

Student has 3 recommended alternates for elective courses which exceeds the maximum number of alternates for elective courses allowed.

Student has 2 recommended study hall courses which exceeds the maximum number of study halls allowed.

Student has a recommended course load of 11.0 which exceeds the maximum scheduling load of 8.

Student duplicate course recommendations:

80010 Study Hall has been recommended more than once in Electives

Required recommended courses:

25150	Woodworking 1	Recommended by:	Berry, Sasha F
20200	IS Computer Prog	Recommended by:	Berry, Sasha F
SCR10002	English 9	Recommended by:	Berry, Sasha F
SCR20002	Mathematics 9	Recommended by:	Berry, Sasha F
SCR30002	Science 9	Recommended by:	Berry, Sasha F
SCR40002	Social Studies 9	Recommended by:	Berry, Sasha F
SCR50002	French 9	Recommended by:	Berry, Sasha F
SCR51002	Spanish 9	Recommended by:	Berry, Sasha F

Alternate for required recommended courses:

25000	Drafting 1	Recommended by:	Berry, Sasha F	Alt. for: Woodworking 1

Elective recommended courses:

15050	Keyboarding	Recommended by:	Berry, Sasha F
80010	Study Hall	Recommended by:	Berry, Sasha F
80010	Study Hall	Recommended by:	Berry, Sasha F
SCR34001	Environmental Studies 11	Recommended by:	Berry, Sasha F
SCR41001	American History 11	Recommended by:	Berry, Sasha F
20050	Computer as a Tool	Recommended by:	Plant, Lola D

Alternates for electives recommended courses:

10200	Adv Drawing & Painting	Recommended by:	Berry, Sasha F
SCR53001	Mandarin Beg	Recommended by:	Berry, Sasha F
SCR52002	Japanese 9	Recommended by:	Berry, Sasha F

Report options include:

- **Select courses**: By default, the report displays all recommended courses. The user can choose to display only recommended courses that require followup.

- **Sort by**: The user can have the list of students sorted by Counselor or Grade level.

By default, the following roles have permission to run this report:

- School Administrator
- School Counselor

Scheduling Reports

Class Add/Drop

This report lists the classes added or dropped by students on a class roster [*Figure 230*]. The report identifies the class, the student, and the reason given for the change.

Figure 230: Class Add/Drop report sample results

Class Adds/Drops (by Teacher): Chancery High for 2005 - 2006

Teacher Name: Arness, James (1)

Class	Add/Drop	Effective Date	Student Name	Grade	Gender	Change Reason
Ancient Civilizations-2	Add	01/01/2006	Brody, Joan (9999016748)	11	F	N/A

Teacher Name: Becker, Paul (5025)

Class	Add/Drop	Effective Date	Student Name	Grade	Gender	Change Reason
Junior English-1	Add	09/27/2005	Brody, Joan (9999016748)	11	F	N/A

Teacher Name: Bennett, Albert (T-5194)

Class	Add/Drop	Effective Date	Student Name	Grade	Gender	Change Reason
Algebra 2-1	Add	09/27/2005	Brody, Joan (9999016748)	11	F	N/A

Teacher Name: Bush, George W. (T-5188)

Class	Add/Drop	Effective Date	Student Name	Grade	Gender	Change Reason
European History-1	Add	08/11/2005	Averett, Thomas J (9901569514)	9	M	N/A

Teacher Name: Cavein, Tich A. (2)

Class	Add/Drop	Effective Date	Student Name	Grade	Gender	Change Reason
Pre Algebra-1	Add	09/27/2005	Brody, Joan (9999016748)	11	F	N/A

Teacher Name: Domoney, Dennis (5)

Class	Add/Drop	Effective Date	Student Name	Grade	Gender	Change Reason
Middle Eastern History-1	Add	09/27/2005	Brody, Joan (9999016748)	11	F	N/A

Teacher Name: Einstein, Albert (T-5184)

Class	Add/Drop	Effective Date	Student Name	Grade	Gender	Change Reason
Chemistry-2	Add	09/27/2005	Brody, Joan (9999016748)	11	F	N/A

Teacher Name: Monet, Claude (T-5196)

Class	Add/Drop	Effective Date	Student Name	Grade	Gender	Change Reason
Photography-4	Add	01/01/2006	Brody, Joan (9999016748)	11	F	N/A

Teacher Name: Reiber, Stacy (T-5195)

Class	Add/Drop	Effective Date	Student Name	Grade	Gender	Change Reason
Drawing & Painting-3	Add	09/27/2005	Brody, Joan (9999016748)	11	F	N/A

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Report options include:

- **Effective Date**: Today, the entire school year, or a date range.
- **Print Change Reason**: By code or prose description.
- **Sort by**: Teacher or student

Class Listing (Elementary)

This report enables an elementary School Administrator to show how classes are scheduled [*Figure 231*]. It lists each class, the teacher, the room, and the number of students registered versus the capacity. This report is similar to the secondary Master Schedule report [p. 570].

Figure 231: Class Listing report sample results

Class Listing

Cypress Elementary

Schedule: 2005-2006 A

Meeting Pattern	Subject	Class Name	Scheduling Group	Teacher(s)	Room	# of Students
M6	Physical Education	Physical Education 6 [1]	Classes	Mayfield, M.		0 (0)/0
T6	Art	Art 6 (160)	Classes	Becker, P.	160	0 (0)/20
W6	Physical Education	Physical Education 6 [1]	Classes	Mayfield, M.		0 (0)/0
Th6	Art	Art 6 (160)	Classes	Becker, P.	160	0 (0)/20
F6	Music	Music 6 (160)	Classes	Bellamy, J.	160	0 (0)/20
	Art	Art 1 (110)	Classes	Becker, P.	110	0 (0)/20
		Art 1 (115)	Classes	Becker, P.	115	0 (0)/20
		Art 2 (120)	Classes	Becker, P.	120	0 (0)/20
		Art 2 (125)	Classes	Becker, P.	125	0 (0)/20
		Art 3 (130)	Classes	Becker, P.	130	0 (0)/20
		Art 3 (135)	Classes	Becker, P.	135	0 (0)/20
		Art 4 (140)	Classes	Becker, P.	140	0 (0)/20
		Art 4 (145)	Classes	Becker, P.	145	0 (0)/20
		Art 5 (150)	Classes	Becker, P.	150	0 (0)/20
		Art 5 (155)	Classes	Becker, P.	155	0 (0)/20
		Art 6 (165)	Classes	Becker, P.	165	0 (0)/20
		Art K (101)	Classes	Becker, P.	101	0 (0)/20
		Art K (105)	Classes	Becker, P.	105	0 (0)/20
	Language Arts	Language Arts 1 (110)	Classes	Christian, K.	110	0 (0)/20
		Language Arts 1 (115)	Classes	Colvin, P.	115	0 (0)/20
		Language Arts 2 (120)	Classes	Fike, B.	120	0 (0)/20
		Language Arts 2 (125)	Classes	Giannelli, T.	125	0 (0)/20
		Language Arts 3 (130)	Classes	Gonzalez, M.	130	0 (0)/20
		Language Arts 3 (135)	Classes	Hardin, L.	135	0 (0)/20
		Language Arts 4 (140)	Classes	Harris, L.	140	0 (0)/20
		Language Arts 4 (145)	Classes	Hendricks, B.	145	0 (0)/20
		Language Arts 5 (150)	Classes	Hix, M.	150	0 (0)/20
		Language Arts 5 (155)	Classes	Lankford, V.	155	0 (0)/20

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A **# of Students**: Displays (in order) the number of students scheduled to be in this class, the highest number of students that have been scheduled to be in this class (the "high water mark"), and the capacity of the class.

Report options include:

- **Sort by:**
  Meeting Pattern
  Subject

Class Roster

Printing this report enables a teacher or administrator to keep a paper-based attendance record for each class [*Figure 232*]. It lists all students in the

specified class or homeroom and has a blank space for each day of the week or month. The report includes all information necessary to submit the attendance papers, such as the class name, the teacher's name, and class's schedule.

Figure 232: Class Roster report sample results

Report options include:

- **Effective Date**: Today, the entire school year, or a date range.
- **Report Type**: Weekly, monthly, or Demographics.
- **Roster**: Class, Homeroom, or both
- **Sort Print Output By**: Teacher then Class/Homeroom or by Class/Homeroom
- **Print Gender Summary**
- **Print Ethnic Category Summary**

Class Roster Monthly

Printing this report enables a teacher or administrator to keep a paper-based attendance record for each class [*Figure 233*]. It lists all students in the specified class or homeroom and has a blank space for each day of the specified month. The report includes all information necessary to submit the attendance papers, such as the class name, the teacher's name, and class's schedule.

Note: Since the Class Roster report [p. 558] is newer and offers more options, including weekly attendance, we recommend that you hide this report from most users.

Class Roster (Monthly)

Chancery High

Class: Advanced Placement English-2   **Schedule:** 2005 - 2006

Teacher(s): Wilson, Brenda Term: FY Meets: P2 Room: 127

Student Name	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Cesaire, Nariyah																															
Coleman, Christopher																															
Collier, Tanisha L																															
Dabresil, Robert A																															
Delva, Lakeisha C																															
Dhaiti, Charna C																															
Dorielan, Ralph T																															
Doucette, Eveline M																															
Edwards, Brandon J																															

Class Roster Weekly

Printing this report enables a teacher or administrator to keep a paper-based attendance record for each class [*Figure 234*]. It lists all students in the specified class or homeroom and has a blank space for each day of the specified week. The report includes all information necessary to submit the attendance papers, such as the class name, the teacher's name, and class's schedule.

Note: Since the Class Roster report [p. 558] is newer and offers more options, including weekly attendance, we recommend that you hide this report from most users.

Figure 234: Class Roster Weekly report sample results

Class Roster (Weekly)

Chancery High

Class: Advanced Placement English-2   **Schedule:** 2005 - 2006

Teacher(s): Wilson, Brenda Term: FY Meets: P2 Room: 127

Student Name	Monday	Tuesday	Wednesday	Thursday	Friday
Cesaire, Nariyah					
Coleman, Christopher					
Collier, Tanisha L					
Dabresil, Robert A					
Delva, Lakeisha C					
Dhaiti, Charna C					
Dorielan, Ralph T					
Doucette, Eveline M					
Edwards, Brandon J					

Class Schedule Log

This report enables an administrator to review the process of building a master schedule. The report displays the contents of the log from the "Schedule Classes" process, which records the date and details of each event in the process [*Figure 235*].

Figure 235: **Class Schedule Log report sample results**

Student Contacts Roster

This report presents, for every student in a specified class or homeroom, information on how to contact the student's parent, guardians, and emergency contacts [*Figure 236*]. For each contact, the report indicates whether that contact lives with the student, gets mailings for the student, has custody of the student, or is the emergency contact.

Figure 236: Student Contacts Roster report sample results

A Lives with: Indicates that this contact lives with the student
B Custody: Indicates that this contact has custody of the student.
C Mailings: Indicates that this contact receives mailings from the school pertaining to this student.
D Emergency: Indicates that this contact is an emergency contact for the student.

Report options include:

- **Effective Date**: Today, the entire school year, or a date range.
- **Contacts Included**: All contact, or emergency contacts only.
- **Roster**: Class, Homeroom, or both
- **Sort Print Output By**: Teacher then class/homeroom, or class/homeroom

Course Catalog by Name

This report lists the details of all courses available by course name [*Figure 237*]. This list facilitates registration and scheduling by presenting enough information about each course (such as level, prerequisites, and credits) to enable students and their parents to select courses and counselors to advise students.

Course Catalog 2005/2006

Arlington High School

202 Regents Physical Setting/

AP PHYSICS - LAB 4060 (202AP-PH-R)

State Course Number:	4060	
Grade Level(s):	9, 10, 11, 12	**Credit:** 1.0000
Prerequisite(s):	None	
Corequisite(s):	PHYSICS-R w/LAB 4040	
AP PHYSICS-R w/LAB		

PHYSICS-R w/LAB 4040 (Phy. Lab)

State Course Number:	4040	
Grade Level(s):	9, 10, 11, 12	**Credit:** 1.0000
Prerequisite(s):	None	
Corequisite(s):	None	
PHYSICS-R w/LAB		

Course Catalog by Number

This report lists the details of all courses available by course number [*Figure 238*]. This list facilitates registration and scheduling by presenting enough information about each course (such as level, prerequisites, and credits) to enable students and their parents to select courses and counselors to advise students.

Figure 238: Course Catalog by Number report sample results

Course Catalog 2005/2006

Oceanview High School

Performing Arts

65200 Stage Craft 1 (Pa sc1)

State Course Number:

Grade Level(s):   Any   Credit: 1.0000

Prerequisite(s):   None

Corequisite(s):   None

65250 Stage Craft 2 (Pa sc2)

State Course Number:

Grade Level(s):   10, 11, 12   Credit: 0.5000

Prerequisite(s):   Stage Craft 1 65200

Corequisite(s):   None

Course Request List

By course, this report lists students who have requested the course [*Figure 239*]. The report also tallies the number of primary versus alternate requests. By default, PowerSchool SMS sets the report filters to only the selected students.

Course Request List

Chancery High

Schedule: 2005 - 2006

ACCT (BUS9877)   99% (98 of 99) primary requests scheduled, and 0 of 0 alternate requests scheduled

Count	Student Name	Student ID	Grade Level	Gender	Term	Type
1.	Abbott, Daline	9901243499	12	Female		Primary
2.	Alexandre, Kristin Tshwanda	9900855326	12	Female		Primary
3.	Anderson, Bridget Denise	9900611406	12	Female		Primary
4.	Anderson, Desiree Shaqueta	9900992093	12	Female		Primary
5.	Andre, Dave Troy	9901220491	12	Male		Primary
6.	Anthony, Lauren	9901192971	12	Female		Primary
7.	Armstead, Kenneth	9901202662	12	Male		Primary
8.	Bastien, Jennifer D	9901356335	12	Female		Primary
9.	Beaulieu, Shacarra S	9901000931	12	Female		Primary
10.	Blaise, Maria Delores	9901138297	12	Female		Primary
11.	Bolden, Shayna Monique	9900869407	12	Female		Primary
12.	Bowers, Lysandra	9901305507	12	Female		Primary
13.	Bridges, Radeya	9901502595	12	Female		Primary
14.	Brown, Brandon C	9900865978	12	Male		Primary

Course Request Rule Violation

This report lists violations of course request rules grouped by student [*Figure 240*]. This report enables an administrator to identify and resolve course request issues. By default, PowerSchool SMS sets the report filters to only the selected students. **Note:** This report is a condensed version of the exceptions information included in the Course Request Verification report [p. 569].

Figure 240: Course Request Rule Violation report sample results

Course Request Rule Violations

Arlington High School   Schedule: Planning Schedule A (2005-2006

Aitken, Jene (10041021)

Course Name	Course #	Type	Term	Exception
AP PHYSICS - LAB	4060	Req'd		Co-requisite not met: PHYSICS-R w/LAB Requested same course multiple times

Akers, Clyde (10042706)

Course Name	Course #	Type	Term	Exception
AP PHYSICS - LAB	4060	Req'd		Co-requisite not met: PHYSICS-R w/LAB Requested same course multiple times

Akin, Lacresha (10041371)

Course Name	Course #	Type	Term	Exception
AP PHYSICS - LAB	4060	Req'd		Co-requisite not met: PHYSICS-R w/LAB Requested same course multiple times

Alatorre, Domenica (10040002)

Course Name	Course #	Type	Term	Exception
Algebra	12	Req'd		Pre-requisite not met: Algebra PRE
AP PHYSICS - LAB	4060	Req'd		Co-requisite not met: PHYSICS-R w/LAB Requested same course multiple times
US HISTORY	2235	Req'd		Co-requisite not met: WORLD HISTORY - A

Course Request Tally

This report presents the total number of student requests for each course [*Figure 241*]. It shows both primary and alternate requests and breaks down the primary requests by gender.

Figure 241: Course Request Tally report sample results

Course Request Tally by Grade

Chancery High   Schedule: 2005 - 2006

Course Name (#)	# of Classes Created	Total Primary Requests	Total Alternate Requests	Male	Female	Grade Level #					
						N/A	7	8	9	10	11
Accounting Principles (BUS9877)	4	99		48	51				34	22	25
Advanced Placement Calculus	2	36		19	17	2					
Advanced Placement English	3	51		25	26	2					
Advanced Placement History	2	36		19	17	1					
Algebra (MATH8734)	4	100		53	47	1			99		
Algebra 2 (MATH3323)	4	103		58	45						103
American History (SS8786)	1	30		14	16			30			

Report options include:

- **Report Type:**

  "By grade" uses the student's projected grade level and lists the courses alphabetically [*Figure 241*].

  "By grade and department" uses the student's projected grade level and groups the courses by department.

  "By term" uses the coming term and lists the courses alphabetically.

  "By term and department" uses the coming term and groups the courses by department.

  "By gender and ethnic category"

- **Show:**

  Totals Only

  Percentages Only

  Totals and Percentages

- **Sort Order:** By course name or number

Course Request Tally by Grade

This report presents the total number of student requests for each course [*Figure 242*]. It shows both primary and alternate requests and breaks down the primary requests by gender and by grade.

Figure 242: Course Request Tally by Grade report sample results

Course Request Tally - by Grade Level

Chancery High   Schedule:2005 - 2006

Course Name (#)	Total Primary Requests	Total Alternate Requests	Male	Female	Grade Levels					
					N/A	7	8	9	10	11
ACCT (BUS9877)	99		48	51				34	22	25
Aide (SER3345)	55		27	28						30
ALG (MATH8734)	100		53	47	1			99		
ALG 2 (MATH3323)	102		58	44						102
ANCT CIV (SS88976)	102		58	44						102
AP CALC (MATH9987)	36		19	17	2					
AP ENG (LA55632)	51		25	26	2					
AP HISTORY (SS8876)	36		19	17	1					
ARCH DRAFT (LMS9333)	60		31	29	1			2	18	21
ART EXP MS (ART3444)	33		12	21		21	12			
BAND-MS (MUS4453)	27		12	15		19	8			
BIOLOGY (SCI8873)	100		53	47					100	
BUS ETH (BUS5559)	144		81	63	1			28	44	47
BUS INT (BUS9986)	51		27	24	1					26
CHEM (SCI8864)	102		58	44						102
CHOIR-MS (MUS3325)	35		19	16		18	17			
CONC CHOIR (MUS8876)	96		43	52	1			69		
CUR EVENTS (SS8874)	69		16	53	1					

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Course Request Tally by Term

This report presents the total number of student requests for each course [*Figure 243*]. It shows both primary and alternate requests and breaks down the primary requests by gender and by the term requested.

Figure 243: Course Request Tally by Term report sample results

Course Request Tally - by Term

Chancery High   Schedule:2005 - 2006

Course Name (#)	Total Primary Requests	Total Alternate Requests	Male	Female	Term Preferences No Term
ACCT (BUS9877)	99		48	51	99
Aide (SER3345)	55		27	28	55
ALG (MATH8734)	100		53	47	100
ALG 2 (MATH3323)	102		58	44	102
ANCT CIV (SS88976)	102		58	44	102
AP CALC (MATH9987)	36		19	17	36
AP ENG (LA55632)	51		25	26	51
AP HISTORY (SS8876)	36		19	17	36
ARCH DRAFT (LMS9333)	60		31	29	60
ART EXP MS (ART3444)	33		12	21	33
BAND-MS (MUS4453)	27		12	15	27
BIOLOGY (SCI8873)	100		53	47	100
BUS ETH (BUS5559)	144		81	63	144
BUS INT (BUS9996)	51		27	24	51
CHEM (SCI8864)	102		58	44	102
CHOIR-MS (MUS3325)	35		19	16	35
CONC CHOIR (MUS8876)	95		43	52	95
CUR EVENTS (SS8874)	69		16	53	69

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Course Request Tally by Term by Dept

This report presents the total number of student requests for each course grouped by department [*Figure 244*]. It shows both primary and alternate requests and breaks down the primary requests by gender and by the term requested.

Figure 244: Course Request Tally by Term by Department report sample results

Course Request Tally - by Department / Term

Chancery High   Schedule:2005 - 2006

Fine Arts - Art

Course Name (#)	Total Primary Requests	Total Alternate Requests	Male	Female	Term Preferences No Term
ART EXP MS (ART3444)	33		12	21	33
DRAW (ART5783)	55		25	30	55
PHOTO (ART3388)	104		40	64	104
SCULPT (ART5778)	80		31	49	80

Course Request Verification

This report lists a specific student's course requests in a format that enables a student's parent or guardian to review and sign off on the requests [*Figure 245*]. Primary and alternate requests are listed separately. By default, PowerSchool SMS sets the report filters to only the selected students.

Figure 245: Course Request Verification report sample results

Course Request Verification
Crystal High School

Schedule : Planning Schedule 1

Requests for : Arms, Harris (10462469)   Grade : 12

Primary Requests

Course	Credits	Type	Priority	Term	Grade Level	Exceptions
CRD-Chemistry-2S	1.0	Req'd	10			
CRD-English-2S	1.0	Req'd	10			
CRD-Geography-2S	1.0	Elect	10			
CRD-History-2S	1.0	Elect	10			
CRD-Mathematics-2S	1.0	Req'd	10			
CRK-Artistry Techniques	1.0	Elect	10			
CRT-Algebra II	1.0	Req'd	10			Course intended for Grade Level(s): 9, 10
CRT-Physics 11	1.0	Elect	10			Course intended for Grade Level(s): 11

Total Requested Credits :   8.0

Parent/Guardian Signature : _____

Full Time Equivalent Summary

This report lists scheduled classes for a specific term that details full time equivalents (FTEs) for courses [*Figure 246*]. Details include course scheduling load, term, the number of classes created, the percentage of the course that is completed within the selected term (for example, 100% for a single-term class, 50% for a class that spans two terms), and the scheduling load for the selected term. In addition, it details the FTEs needed to cover all created classes, the FTEs allocated for the classes needed, and the FTEs of teachers scheduled to classes. Totals are also provided, broken down by subject area, department, and term. Note: This report does not work with filters.

Figure 246: Full Time Equivalent Summary report sample results

Full Time Equivalent Summary

Chancery High

Schedule: 2005 - 2006
Full-time Teaching Load: 5.00

Term: FY

Course Name (#)	Course Scheduling Load	Course Term	# Classes Created	% complete within grouped Term	Scheduling Load for grouped Term	FTE Required	FTE Allocated	FTE Scheduled
ART EXP MS (ART3444)	0.50	S1	1	100%	0.50	0.10	0.10	0.10
ART EXP MS (ART3444)	0.50	S2	1	100%	0.50	0.10	0.10	0.10
DRAW (ART5783)	0.50	S1	2	100%	1.00	0.20	0.20	0.20
DRAW (ART5783)	0.50	S2	1	100%	0.50	0.10	0.10	0.10
PHOTO (ART3388)	0.50	S1	3	100%	1.50	0.30	0.30	0.30
PHOTO (ART3388)	0.50	S2	2	100%	1.00	0.20	0.20	0.20
SCULPT (ART5778)	0.50	S1	2	100%	1.00	0.20	0.20	0.20
SCULPT (ART5778)	0.50	S2	2	100%	1.00	0.20	0.20	0.20
			Totals for Subject Area: Art		7.00	1.40	1.40	1.40
BAND-MS (MUS4453)	1.00	FY	1	100%	1.00	0.20	0.20	0.20
CHOIR-MS (MUS3325)	1.00	FY	1	100%	1.00	0.20	0.20	0.20
CONC CHOIR (MUS8876)	1.00	FY	1	100%	1.00	0.20	0.20	0.20
GEN MUS MS (MUS9938)	0.50	S1	1	100%	0.50	0.10	0.10	0.10
SYM BAND (MUS5739)	1.00	FY	1	100%	1.00	0.20	0.20	0.20
			Totals for Subject Area: Music		4.50	0.90	0.90	0.90
DRAMA-MS (THE4883)	0.50	S1	1	100%	0.50	0.10	0.10	0.10
DRAMA-MS (THE4883)	0.50	S2	1	100%	0.50	0.10		0.10
SET LIGHTS (THE8845)	0.50	S1	1	100%	0.50	0.10	0.10	0.10
SET LIGHTS (THE8845)	0.50	S2	1	100%	0.50	0.10	0.10	0.10
THEATRE PR (THE5577)	0.50	S1	3	100%	1.50	0.30	0.30	0.30
THEATRE PR (THE5577)	0.50	S2	2	100%	1.00	0.20	0.20	0.20
			Totals for Subject Area: Theatre		4.50	0.90	0.80	0.90
			Totals for Department: Fine Arts		16.00	3.20	3.10	3.20

Load Students Log

This report displays the details of scheduling decisions made by the Master Schedule Builder [*Figure 247*].

Figure 247: Load Students Log report sample results

Student Schedule Log

Schedule: ohs 1

Time Stamp	EventType	Event Details
2004/06/02 13:39:46	Begin student loader	Overfill:0%, Max. Unscheduled:2, Use Rescheduling:Yes, Balance Classes:Yes, Use Alternates:Yes
		Priorities:Sequence:2, Attribute:3, Balance:1, Term Preferences:4
2004/06/02 13:39:51	Progress Information	Initialization Complete
2004/06/02 13:39:51	Progress Information	Loader Student Creation Starting
2004/06/02 13:42:40	Progress Information	Loader Student Creation Complete
2004/06/02 13:42:40	Progress Information	Loader Engine Starting
2004/06/02 13:43:15	Pattern limit exceeded	Maximum Patterns:10000
2004/06/02 13:43:30	Pattern limit exceeded	Maximum Patterns:10000
2004/06/02 13:43:31	Pattern limit exceeded	Maximum Patterns:10000
2004/06/02 13:45:13	Pattern limit exceeded	Maximum Patterns:10000
2004/06/02 13:45:20	Pattern limit exceeded	Maximum Patterns:10000

Master Schedule

This report lists all courses, the classes scheduled for each course, and the details of those classes, including scheduling group, team, term, meeting pattern, teacher, room, and number of students [*Figure 248*].

Master Schedule

Arlington High School

Selected Term(s):

Selected Scheduling Group(s):   Schedule: Planning Schedule A (2005-2006)

Course	Class Name	Scheduling Group	Team	Term	Meeting Pattern	Teacher(s)	Room	# of Students
202AP-PH-R (4060)	AP PHYSICS - LAB-6	Group 1		T1				0/23
	AP PHYSICS - LAB-7	Group 1		T1				20/23
	AP PHYSICS-R w/LAB-1	Group 1	Team 1	T1	TR (D)	Adair, Rodolfo / Addis, Giovanni / Begay, Marlys	105 (1)	0/23
	AP PHYSICS-R w/LAB-2	Group 1		T3	TR (D)	Teacher placeholder B	105 (1)	30/23
	AP PHYSICS-R w/LAB-3	Group 1		T4	TR (D)	Teacher placeholder A / Aybar, Cedrick / Bowe, Harry	103 (1)	20/23
	AP PHYSICS-R w/LAB-4	Group 1		T1		Veasey, Miranda		30/23
	AP PHYSICS-R w/LAB-5	Group 1		T4		Adair, Rodolfo		0/23
Algebra (12)	Algebra-1	Group 1	Team 2	T1	MWF (F)	Aybar, Cedrick / Campa, Hershel / Chaidez, Joan	103 (1)	0/29
	Algebra-2	Group 1	Team 3	T2	TR (D)	Conkling, Marcos / Bowe, Harry / Campa, Hershel	104 (1)	30/29
	Algebra-3	Group 1	Team 3	T3	MWF (F)	Adair, Rodolfo / Caton, Eugenio / Chaidez, Joan	101 (1)	30/29
	Algebra-4	Group 1	Team 3	T1	TR (D)	Cisneros, Mac	101 (1)	0/29
Algebra PR (45445)	Algebra PRE-1	Group 1	Team 1	OT	MWF (A)	Adair, Rodolfo	105 (1)	30/30
English (8)	English-1	Group 1		T1				30/29
Geometry (13)	Geometry-1	Group 1	Team 2	T2	MWF (G)	Begay, Marlys	103 (1)	30/29
	Geometry-2	Group 1	Team 1	T1	MWF (E)	Bello, Jacquline	104 (1)	0/29

Master Schedule by Meeting Pattern

This report lists all meeting patterns, the classes scheduled for each course, and the details of those classes, including scheduling group, team, term, course, teacher, room, and number of students [*Figure 249*].

Figure 249: Master Schedule by Meeting Pattern report sample results

Master Schedule by Meeting Pattern

Chancery High

Schedule: 2005 - 2006

Meeting Pattern	Term	Course	Class Name	Scheduling Group	Team	Teacher(s)	Room	# of Students
P1	S1	THEATRE PR (THE557	Theatre Production-1	High School		Giannelli, Tom	400 (755)	4/35
P1	S2	Aide (SER3345)	Student Aide-2	High School				26/50
P1	S2	PE - MS (PE88377)	Physical Education - Middle	High School		Thorpe, James	700 (755)	31/35
P1	S2	SET LIGHTS (THE8845	Sets & Lighting-2	High School		Giannelli, Tom	400 (755)	55/50
P1	S2	Study Hall (84503)	Study Hall - Spring-1	High School				3/35
P1	S2	US HIST 45 (SS88334)	US History - 1945 to presen	High School		Rooney, Andy	123 (755)	23/35
P2	FY	ALG 2 (MATH3323)	Algebra 2-3	High School		Duchesne, Yanick	110 (755)	33/35
P2	FY	AP CALC (MATH9987)	Advanced Placement Calcu	High School		Fitts, Robert	111 (755)	7/35
P2	FY	AP ENG (LA55632)	Advanced Placement Englis	High School		Wilson, Brenda	127 (755)	9/35

Open Seats Summary

This report totals the capacity, seats filled, and seats available for all classes in each meeting pattern, broken down by scheduling group and term [*Figure 250*]. The numbers are distributed across grade levels according to the grade levels of students with course requests for the associated classes. When there are no students loaded into classes, the distribution across grade

levels is evenly balanced for each class. As students are loaded into classes, the grade level distribution adjusts dynamically to reflect actual grade levels in the different classes.

This report is useful for schools using secondary scheduling, but it also runs for schools using elementary scheduling if meeting patterns are defined and assigned to lasses.

Open Seats Summary

Alta High School

| Term(s) selected: | | | | | | Schedule: 2004-2006 | |

Grade: 9   Total # of Students in grade: 24

Term	Sched Group	Meeting Pattern	Total # Seats	# Seats Filled	% Seats Filled	# Seats Avail	% Seats Avail
Semester 1	Freshman & Sophomore	MTWRF - 1	2	0	0.00 %	2	100.00 %
Total Grade 9, Semester 1, Freshman & Sophomore:			2	0	0.00 %	2	100.00 %
Total Grade 9, Semester 1:			2	0	0.00 %	2	100.00 %
Semester 2	Freshman & Sophomore	MTWRF - 1	1	0	0.00 %	1	100.00 %
Total Grade 9, Semester 2, Freshman & Sophomore:			1	0	0.00 %	1	100.00 %
Total Grade 9, Semester 2:			1	0	0.00 %	1	100.00 %

Room Matrix by Day Period

The report displays how a school's rooms are used during each period of each day's schedule [*Figure 251*]. Where a room is assigned to a course, the reports shows the class, teacher, department, the number of students in the class, and the class capacity. Where there is a conflict (that is, more than one class scheduled into a room in a given period), the first class is displayed and a message indicates the conflict. The report is broken down by scheduling group, but any overlap with classes from other scheduling groups is shown for each period.

This report is useful for schools using secondary scheduling, but it also runs for schools using elementary scheduling if meeting patterns are defined and assigned to lasses.

Room Matrix by Day & Period

Alta High School

Building: 385   Term: First Quarter   Schedule: 2004-2005

Scheduling Group: 41   Day: Thursday

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Period:	1	2	3	4L	5L	6
101 (Main Building)						
102 (Main Building)					*25-4L-S1 Computer Basic Ops-1 Alta, A (Athletics) 2/24	*25-4L-S1 Computer Basic Ops-1 Alta, A (Athletics) 2/24
103 (Main Building)						
104 (Main Building)						
105 (Main Building)						*25-S-S1 AP Art-1 Reynolds, J 0/24
106 (Main Building)		*25-2-S1 Government-1 Lopez, J 5/28	*25-2-S1 Government-1 Lopez, J 5/28			
107 (Main Building)		*25-2-S1 Accounting II-1 Hennigs, J 18/24	*25-2-S1 Accounting II-1 Hennigs, J 18/24			

On this report, we recommend using the following default filters:

Filter	Filter Option	Description
Room	Name	Prompts users to filter by room name.
	Number	Prompts users to filter by room number.

Room Schedule

This report lists the details of classes being held in a particular room [*Figure 252*], including the meeting pattern, term, class name, teacher, and the number of students versus the room capacity.

Figure 252: Room Schedule report sample results

Room Schedule

Chancery High

Room Number: 102   Schedule: 2005 - 2006
Building Number: 755   Room Type: Classroom

Meets	Term	Class Name	Teacher(s)	# of Students
P1	S1	Health - Middle School-1	Bryant, Paul	26/35
P2	FY	Trigonometry/Pre-Calculus-1	Bennett, Albert	36/35
P3	FY	Algebra-1	Bennett, Albert	11/35
P4	FY	General Math Skills-1	Bennett, Albert	28/35
P5	FY	Life Science-1	Bernoulli, James	9/35
P7	FY	Algebra 2-1	Bennett, Albert	17/35

Room Schedule Matrix

The report displays how a school room is used during each period on each day of the week [*Figure 253*]. For each class, the report includes the term, class name, teacher, and the number of students versus the room capacity

Figure 253: Room Schedule Matrix report sample results

On this report, we recommend using the following default filters:

Filter	Option	Description
Building	Name	Prompts users to filter by building name.
Room	Name	Prompts users to filter by room name.
	Number	Prompts users to filter by room number.
Term	Name	Prompts users to filter by term name.

Scheduling Configuration

This report provides a summary [*Figure 254*] of the following settings configured on the Scheduling Steps page:

* Under Step 2, Scheduling Structure
* Under Step 3, Class Loading Rules
* Under Step 5, Class Scheduling Options
* Under Step 6, Student Loader Options

Scheduling Configuration

Crystal High School

Schedule: Planning Schedule 1

Scheduling Groups

Scheduling Group	Description
DBGroup	Double blocks
FGroup	Full year group
MS Students	MS students only - scheduling group to test SRC group by parameter
OffGroup	
S1Group	
S2Group	
T1Group	
T2Group	
T3Group	
T4Group	
XPeriods	other bell schedule to allow student schedules with periods overlapping

Scheduling Term Set

Term Set	Sched. Grp	Term	Code	Start Date	End Date
Full Year	DBGroup	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
	FGroup	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
	MS Students	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
	OffGroup	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
	S1Group	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
	S2Group	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
	T1Group	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
	T2Group	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
	T3Group	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
	T4Group	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
	XPeriods	Full Year	Yr	Jul 18, 2005	Jul 15, 2006
Quarters	DBGroup	Term 1	T1	Jul 18, 2005	Nov 6, 2005
		Term 2	T2	Nov 7, 2005	Jan 29, 2006
		Term 3	T3	Jan 30, 2006	Apr 23, 2006
		Term 4	T4	Apr 24, 2006	Jul 15, 2006
	FGroup	Term 1	T1	Jul 18, 2005	Nov 6, 2005
		Term 2	T2	Nov 7, 2005	Jan 29, 2006
		Term 3	T3	Jan 30, 2006	Apr 23, 2006

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Scheduling Performance Statistics

This report provides statistics related to the effectiveness of the master schedule as it relates to student requests scheduled, with detail by scheduling group and grade level [*Figure 255*].

Figure 255: Scheduling Performance Statistics report sample results

Scheduling Performance Statistics

Chancery High

Schedule: 2005 - 2006

Total FTE for classes

Scheduling Group	FTE Required	FTE Allocated	FTE Scheduled	% Scheduled
High School	23.03	21.67	22.00	102.00 %
All Groups:	**23.03**	**21.67**	**22.00**	**102.00** %

Total number of classes

Scheduling Group		# Created	# Scheduled	% Scheduled
High School		214	193	90 %
All Groups:		**214**	**193**	**90** %

Total number of primary student course requests

Grade Level		# Entered	# Scheduled	% Scheduled
Grade N/A		49	24	49 %
Grade 7		1,064	539	51 %
Grade 8		478	239	50 %
Grade 9		1,794	785	44 %
Grade 10		1,958	1,063	54 %
Grade 11		1,931	952	49 %
Grade 12		905	902	100 %
All Grade Levels:		**8,179**	**4,504**	**57** %

Average class size

Scheduling Group	Grade Level	Required	Elective	All Classes
High School	Grade 7	35(+/-0)		35(+/-0)
	Grade 8	35(+/-0)		35(+/-0)
	Grade 9	33(+/-3)		33(+/-3)
	Grade 10	34(+/-2)		34(+/-2)
	Grade 11	33(+/-3)		33(+/-3)
	Grade 12	35(+/-0)		35(+/-0)
	Multi-grade	34(+/-2)	39(+/-19)	37(+/-16)
	All Grade Levels:	**34(+/-2)**	**39(+/-19)**	**36(+/-13)**
All Groups	Grade 7	35(+/-0)		35(+/-0)
	Grade 8	35(+/-0)		35(+/-0)
	Grade 9	33(+/-3)		33(+/-3)
	Grade 10	34(+/-2)		34(+/-2)
	Grade 11	33(+/-3)		33(+/-3)

Scheduling Pre-check Builder

This report lists potential problem areas with the scheduling setup before a run of the Master Schedule Builder [*Figure 256*].

Figure 256: Scheduling Pre-check Builder report sample results

Scheduling Pre-check Builder

Chancery High

Course-Teacher Room Preference Discrepencies

Course Name	Course Room Preferences	Teacher Name	Course Pref	Teacher Room Preferences
Band - Middle School (MUS4453)	Room Types: Music Rehearsal Room	Rowe, Jacob (T-5210)	5	
Choir - Middle School (MUS3325)		Rowe, Jacob (T-5210)	5	
Concert Choir (MUS8876)		Rowe, Jacob (T-5210)	5	
General Music - MS (MUS9938)		Rowe, Jacob (T-5210)	5	
Symphonic Band (MUS5739)		Rowe, Jacob (T-5210)	5	

Course-Teacher Alocation Discrepencies

Course Name	FTE Needed for Classes	FTE Allocated for Classes	Difference
German - Advanced (FL3992)	0.4	0.2	-0.2
German - Intermediate (FL99333)	0.4	0.2	-0.2
Drama - Middle School (THE4883)	0.2	0.1	-0.1
American History (SS8786)	0.2	0.4	0.2

Day without Bell Schedules

Scheduling Group	Regular or Special Day without Bell Schedule
Middle School	Regular Day

Teacher over/under-allocations

Teacher Name	Teacher Max Load	Allocated Load	Difference
Franz, Paul (T-5211)	5.00	1.00	-4.00
Murphy, Gary (T-5181)	5.00	1.00	-4.00
Peck, Gregory (T-5203)	5.00	1.00	-4.00
Giannelli, Tom (T-5043)	5.00	1.50	-3.50
Rebak, Davey (T-5039)	5.00	1.50	-3.50
Reiber, Stacy (T-5195)	5.00	1.50	-3.50
Thespian, Bea (T-5202)	5.00	1.50	-3.50
Batt, Wilma (T-5197)	5.00	2.00	-3.00
Mann, Peter (T-5034)	5.00	2.00	-3.00
Monet, Claude (T-5196)	5.00	2.00	-3.00
Rowe, Jacob (T-5210)	5.00	2.50	-2.50
Bryant, Paul (T-5199)	5.00	3.00	-2.00
Cavein, Tich (2)	5.00	3.00	-2.00
Donaldson, Ann (T-5206)	5.00	3.00	-2.00
Foster, Felicia (T-5200)	5.00	3.00	-2.00
Lee, Fred (5042)	5.00	3.00	-2.00
Pickle, Shary (T-5038)	5.00	3.00	-2.00
Thorpe, James (T-5198)	5.00	3.00	-2.00
Wallace, Mike (T-5192)	5.00	3.00	-2.00

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Scheduling Pre-check Loader

This report provides a summary of all of the scheduling setup information that influences the "Load Students" process [*Figure 257*]. It includes sections for: Teacher Conflicts, Room Conflicts, Classes missing Teachers, Classes missing Rooms, and Classes missing Meeting Patterns.

Figure 257: Scheduling Pre-check Loader report sample results

Scheduling Pre-check Loader

Chancery High

Schedule: 2005 - 2006

Teacher Conflicts

Teacher	Class Name	Course Name	Term	Meeting Pattern
Arness, James (1)	Government-1	Government (SS88765)	S1	P2
	Current Events-1	Current Events (SS8874)	S1	P4
	Teacher Planning-1	CSL SMS Reservation Label Teache	S1	P5
	Ancient Civilizations-2	Ancient Civilizations (SS88976)	S2	P2
	Middle Eastern History-2	Middle Eastern History (SS7634)	S2	P4
	Geography-2	Geography (SS3211)	S2	P5
Barr, George (T-5188)	Ancient Civilizations-1	Ancient Civilizations (SS88976)	S1	P2
	European History-1	European History (SS88466)	S1	P5
	Government-3	Government (SS88765)	S1	P6
	American History-1	American History (SS8786)	S2	P2
	Current Events-2	Current Events (SS8874)	S2	P5
	Middle Eastern History-4	Middle Eastern History (SS7634)	S2	P6
Domoney, Dennis (5)	Middle Eastern History-1	Middle Eastern History (SS7634)	S1	P6
	Government-2	Government (SS88765)	S2	P6
Foster, Felicia (T-5200)	Physical Education - High Sc-5	Physical Education - High School (PE	S1	P3
	Physical Education - High Sc-1	Physical Education - High School (PE	S1	P6
	Individual Sports-2	Individual Sports (PE3335)	S2	P3
	Physical Education - High Sc-4	Physical Education - High School (PE	S2	P6

Student Schedule (Elementary)

For elementary schools, this report produces a schedule of classes for each
student [*Figure 258*].

Figure 258: Student Schedule (Elementary) report sample results

Student last name

Students Schedule (Elementary)

Anderson Elementary School

Schedule: Anderson 2004-05

Student Name: Austria, Fredricka (10020053)

Grade: 6

Homeroom: 121

Class	Meeting Pattern	Teacher(s)	Room
Creative Arts 6 (6A)		Vrooman, Earnest	121
Language Arts 6 (6A)		Vrooman, Earnest	121
Mathematics 6 (6A)		Raphael, Sandra	121
Remedial Math 6 (6A)		Vrooman, Earnest	121
Science 6 (6A)		Vrooman, Earnest	121
Social Studies 6 (6A)		Vrooman, Earnest	121
Spanish Language 6 (6A)		Raphael, Sandra	121

Report options include:

- **Effective Date**: The current date, the entire school year, or a
  specified date range
- **Sort Print Output By**:
  Student last name
  Active Calendar homeroom
  Planning calendar homeroom
  Active Calendar homeroom teacher
  Planning calendar homeroom teacher
  Active Calendar grade level
  Planning calendar grade level

Teacher for a specific Active Calendar
- **Scheduling Group**
- **Meeting Pattern**

Student Schedule

For secondary schools, this report produces a schedule of classes for each student [*Figure 259*]. By default, PowerSchool SMS sets the report filters to only the selected students. For a secondary school, this report is available on the Student Search Results page.

Figure 259: Student Schedule report sample results

Students Schedule
Crystal High School

Student Name: Amaker, Juan (10210122)   **Schedule:** Planning Schedule 1
Grade: 9
Homeroom: 09A

Meets	Term	Class	Teacher	Room
MP1	Yr	CRD-Geography-1	Cutshall, Terese	
MP2	Yr	CRD-History-21	Avera, Caren / Bannister, Rodolfo	
MP3	S1	CRD-Art-3	Cordes, Ola	Room20 (M1)
MP3	S2	CRD-Art-3	Okamoto, Elton	Room20 (M1)
MP5	S1	CRD-Mathematics-2S-1	Ament, Tiffani	Room3 (M1)
MP5	S2	CRD-Mathematics-2S-1	Ament, Tiffani	Room3 (M1)

Student Schedule Matrix (Elementary)

For elementary schools, this report displays a week's schedule of classes for each student [*Figure 260*]. By default, PowerSchool SMS sets the report filters to only the selected students. **Note**: A School Administrator can run this report from the Student Search Results page [*Searching for students* p.37].

Figure 260: Student Schedule Matrix (Elementary) report sample results

Student last name: Brenner, Jared K

Student Schedule: Anderson Elementary School for Anderson 2004-05

Student Name: Brenner, Jared K (10020342) Grade: 8 Homeroom: 200

Scheduling Group: Classes

Report options include:

- **Effective Date**: The current date, the entire school year, or a specified date range
- **Sort Print Output By**:
  Student last name
  Active Calendar homeroom
  Planning Calendar homeroom
  Active Calendar homeroom teacher
  Planning Calendar homeroom teacher
  Active Calendar grade level
  Planning Calendar grade level
  Teacher for a specific Active Calendar
- **Scheduling Group**
- **Meeting Pattern**

Student Schedule Matrix

For secondary schools, this report displays a week's schedule of classes for each student [*Figure 261*]. By default, PowerSchool SMS sets the report filters to only the selected students. **Note**: A School Administrator can run this report from Student Search Results page [*Searching for students* p.37].

Figure 261: Student Schedule Matrix report sample results

Student Schedule: Oceanview High School for New 06-07

Student Name: Abarca, Latina (11330533) Grade: 9 Homeroom: N/A

Scheduling Group: All

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Monday	Tuesday	Wednesday	Thursday	Friday
P1 (7:40 am-8:30 am) Yr (7/16-7/15) 311 (1) **45000[5]**	P1 (7:40 am-8:30 am) Yr (7/16-7/15) 311 (1) **45000[5]**	W1 (7:40 am-9:15 am) Yr (7/16-7/15) 311 (1) **45000[5]**	T1 (7:40 am-9:15 am) Yr (7/16-7/15) 205 (1) **40300[5]**	P1 (7:40 am-8:30 am) Yr (7/16-7/15) 311 (1) **45000[5]**
P2 (8:35 am-9:25 am) Yr (7/16-7/15) 205 (1) **40300[5]**	P2 (8:35 am-9:25 am) Yr (7/16-7/15) 205 (1) **40300[5]**			P2 (8:35 am-9:25 am) Yr (7/16-7/15) 205 (1) **40300[5]**
P3 (9:30 am-10:20 am)	P3 (9:30 am-10:20 am)	W2 (9:30 am-10:45 am)	T2 (9:30 am-10:45 am)	P3 (9:30 am-10:20 am)
P4 (10:25 am-11:15 am)	P4 (10:25 am-11:15 am)	W3 (10:55 am-12:55 pm) Yr (7/16-7/15) 206 (1) **40200[10]**	T3 (10:55 am-12:55 pm) Yr (7/16-7/15) 154 (1) **20150[5]** Leavens, A	P4 (10:25 am-11:15 am)
P5 (11:20 am-12:40 pm) Yr (7/16-7/15) 206 (1) **40200[10]**	P5 (11:20 am-12:40 pm) Yr (7/16-7/15) 206 (1) **40200[10]**			P5 (11:20 am-12:40 pm) Yr (7/16-7/15) 206 (1) **40200[10]**
P6 (12:45 pm-1:35 pm) Yr (7/16-7/15) 154 (1) **20150[5]** Leavens, A P7 (1:40 pm-2:30 pm) Yr (7/16-7/15) 203 (1) **40250[30]** Aviles, B P8 (2:35 pm-3:00 pm)	P6 (12:45 pm-1:35 pm) Yr (7/16-7/15) 154 (1) **20150[5]** Leavens, A P7 (1:40 pm-2:30 pm) Yr (7/16-7/15) 203 (1) **40250[30]** Aviles, B P8 (2:35 pm-3:00 pm)	W4 (1:00 pm-2:30 pm) Yr (7/16-7/15) 203 (1) **40250[30]** Aviles, B	T4 (1:00 pm-2:30 pm)	P6 (12:45 pm-1:35 pm) Yr (7/16-7/15) 154 (1) **20150[5]** Leavens, A P7 (1:40 pm-2:30 pm) Yr (7/16-7/15) 203 (1) **40250[30]** Aviles, B P8 (2:35 pm-3:00 pm)

Student Schedule Load Summary

This report compares each student's scheduled course load with his or her requested load [*Figure 262*].

Student Scheduling Load Summary

Chancery High

Schedule: 2005 - 2006

Student Name	Number	Grade Level	Gender	Scheduled Load	Requested Load
Abbott, Daline	9901243499	12	F	7.00	7.00
Abel, Robert	9903171161	8	M	6.50	7.00
Abel, Tonya	9903171163	8	F	7.00	7.00
Abraham, Felicia	9901235595	9	F	7.00	6.50
Acevedo, Amanda	9901399291	10	F	7.00	7.00
Acosta, Trilauni	9900850933	13	F	0.00	0.00
Adams, Laura	9811271461	7	F	7.00	7.00
Adams, Nicole	9903171166	8	F	7.00	7.00
Affleck, Bonnie	9903171167	8	F	7.00	7.00
Aikens, Charlene	9900839886	11	F	7.00	7.50
Aikin, Zurisaddai	9901393180	10	F	7.00	7.00
Alexa, Amber	9811284103	7	F	7.00	7.00
Alexandre, Kristin	9900855326	12	F	7.00	7.00
Allen, Ariel	9901077974	11	F	7.00	7.00
Allsop, Blair	9900756331	13	M	0.00	0.00
Anderson, Bridget	9900611406	12	F	7.00	7.00
Anderson, Mary	9900864210	13	F	0.00	0.00
Anderson, Desiree	9900992093	12	F	7.00	7.00
Andre, Dave	9901220491	12	M	7.00	7.00
Andrews, Judy	9901008207	11	F	7.00	7.00

Teacher Schedule

This report lists each teacher's schedule of classes [*Figure 263*].

Figure 263: Teacher Schedule report sample results

Teacher Schedule

Chancery High

Teacher Name: Foster, Felicia
Department: Physical Education
Homeroom:

Schedule: 2005 - 2006

Meets	Term	Class	Room	# of Students
P3	S1	Physical Education - High Sc-5	700 (755)	12/35
P3	S2	Individual Sports-2	700 (755)	17/35
P4	S2	Team Sports-2	700 (755)	22/35
P6	S1	Physical Education - High Sc-1	700 (755)	20/35
P6	S2	Physical Education - High Sc-4	700 (755)	32/35
P7	S2	Physical Education - Middle -2	700 (755)	12/35

Teacher Schedule Matrix

This report displays a week's schedule of classes for each teacher [*Figure 264*]. Note: This report does not display information for staff not assigned to a Staff Department.

Figure 264: Teacher Schedule Matrix report sample results

Teacher Schedule: Crystal High School for 2004 - 2005

Teacher Name: Ament, T (12966) Department: Mathematics Homeroom: H46

Scheduling Group: S2Group

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Day S		Day B	
P1 (9:00 am-9:55 am)		P1 (9:00 am-9:55 am)	
S1	Room3 (M1	S1	Room3 (M1
CRD-Chemistry-2S-1		CRD-Chemistry-2S-1	
	6/25		6/25
S2	Room3 (M1	S2	Room3 (M1
CRD-Chemistry-2S-1		CRD-Chemistry-2S-1	
	6/25		6/25
SL (12:00 pm-0:55 pm)		P2 (10:00 am-10:55 am)	
S1	Room3 (M1	S1	Room3 (M1
CRD-English-2S-1		CRD-English-2S-1	
	8/25		8/25
S2	Room3 (M1	S2	Room3 (M1
CRD-English-2S-1		CRD-English-2S-1	
	8/25		8/25
PM (1:00 pm-2:55 pm)		P3 (11:00 am-11:55 am)	
S1	Room3 (M1	S1	Room3 (M1
CRD-Geography-2S-1		CRD-Geography-2S-1	
	4/25		4/25

Teacher Matrix by Day and Period

The report displays where each teacher is assigned during each period of each day's schedule [*Figure 265*]. For a teacher assignment, the report shows the class, room number, the number of students in the class, and the class capacity. Where there is a conflict (that is, more than one assignment in a given period), the first class is displayed and a message indicates the conflict. The report is broken down by scheduling group, but any overlap with classes from other scheduling groups is shown for each period.

This report is useful for schools using secondary scheduling, but it also runs for schools using elementary scheduling if meeting patterns are defined and assigned to lasses.

Figure 265: Teacher Matrix by Day Period report sample results

Teacher Matrix by Day & Period

Alta High School

Term: Full Year Day: Tuesday

Scheduling Group: 25

Schedule: 2004-2005

Department: Biology

Page # 14-1

Period:	1	2	3L	4L	5	6
Lopez, Juan		Government-1-S1			41-7	41-7
					Photography I-1	Photography I-1
		106 5/28			109 7/24	109 7/24

On this report, we recommend using the following default filters:

Filter	Option	Description
Teacher	Last Name	Prompts users to filter by teacher last name.
	First Name	Prompts users to filter by teacher first name.
Term	Name	Prompts users to filter by term name.
Staff Department	Code	Prompts users to filter by staff department short name.
	Description	Prompts users to filter by staff department description.

Unscheduled Rooms

This report lists rooms that have not yet been used in scheduling classes [*Figure 266*]. The report can cover specific room types or terms. The report displays only those rooms that do not have a conflicting schedule item for a particular combination of meeting pattern, term, and scheduling group. It also provides additional key information, such as optimal and maximum room capacity and the number of classes already scheduled for that combination.

Figure 266: Unscheduled Rooms report sample results

Unscheduled Rooms

Chancery High

Selected Terms: Schedule: 2005 - 2006

Selected Room Types:

Meeting Pattern	TermCode	Sched Group	Room Type	Room Number	Optimal Room Capacity	Maximum Room Capacity	# of Classes
ER	FY	High School	Cafeteria	800 (755)	400	800	0 of 9
ER	FY	High School	Classroom	106 (755)	25	35	
				111 (755)	25	35	
				114 (755)	25	35	
				118 (755)	25	35	
				120 (755)	25	35	
				126 (755)	25	35	
				132 (755)	25	35	
ER	FY	High School	Computer Lab	500 (755)	25	35	
ER	FY	High School	Gym	700 (755)	70	120	3 of 4
ER	FY	High School	Music Rehearsal Room	901 (755)	75	125	
ER	FY	High School	Science Lab	202 (755)	25	30	
ER	S1	High School	Art Room	600 (755)	25	35	
				601 (755)	25	35	
ER	S1	High School	Cafeteria	800 (755)	400	800	0 of 9
ER	S1	High School	Classroom	106 (755)	25	35	

Unscheduled Student Analysis

Only for schools using secondary scheduling, this report displays each student's requested but unscheduled classes [*Figure 267*]. By default, PowerSchool SMS sets the report filters to only the selected students. **Note:** If the school has a large number of unscheduled students, this report may take a long time to generate results.

Unscheduled Student Analysis

Alta High School

Schedule : 2004-2005

Bartman, Suzanne L. (900000024)
Gr-10, Female

Requested Load : 1.0000
Scheduled Load : 0.0000

*Alg I (40100)   Priority = 10, Required, Load Factor = 1.0000

Status	Term	Mtg. Pttn.	Class Name	Teacher	Room	#Students
Open	S1	25-MTWRF - 3L	Algebra I-1	Marshall, Tammy	207 (385)	8/30
Open	S1	25-MTWRF - 5	Algebra I-1	Marshall, Tammy	207 (385)	8/30
Open	S2	25-MTWRF - 3L	Algebra I-1	Marshall, Tammy	207 (385)	8/30
Open	S2	25-MTWRF - 5	Algebra I-1	Marshall, Tammy	207 (385)	8/30

On this report, we recommend using the following default filters:

Filter	Option	Description
School Student	Surname	Prompts users to filter by student surname.
	First Name	Prompts user to filter by student first name.

Unscheduled Students

This report lists students who are not scheduled for a class in a particular combination of scheduling group, term, and meeting pattern [*Figure 268*].

Figure 268: Unscheduled Students report sample results

Unscheduled Students

Chancery High

Schedule: 2005 - 2006

Meeting Pattern	Term Name	Scheduling Group	Student Name	Student ID	Grade Level	Gender
P5	S1	High School	Mojica, Shelby Justine	9901068631	10	F
			Morales, Edwin Manuel	9901404637	10	M
			Quash, Allison Tavonda	9810758733	10	F
P5	S2	High School	Abbott, Johnny	9999016763	10	M
			Lucas, Brandi Nicolle	9901155207	10	F
			Marggraf, Joshua	9901063524	10	M
			Montgomery, Cassandra E	9901064171	10	F
			Morales, Sean Paul	9901481740	10	M
			Munnerlyn, Joshua Lee	9901122927	10	M
			Nicolaisen, George Albert	9901331300	10	M
			Quash, Allison Tavonda	9810758733	10	F
P6	FY	High School	Abbott, Johnny	9999016763	10	M
			Quash, Allison Tavonda	9810758733	10	F
P6	S1	High School	Abbott, Johnny	9999016763	10	M
			Quash, Allison Tavonda	9810758733	10	F
P6	S2	High School	Abbott, Johnny	9999016763	10	M
			Leger, Donna Noel	9901518284	10	F

Unscheduled Teachers

This report lists teachers who have not yet been scheduled to teach a class [*Figure 269*].

Unscheduled Teachers

Chancery High

Selected Terms :

Selected Departments :

Schedule: 2005 - 2006

Meeting Pattern	Term	Scheduling Group	Department	Teacher Name	Teacher Course Preference
ER	S1	High School	Fine Arts	Giannelli, Tom	DRAMA-MS (5), SET LIGHTS (5), THEATRE PR (5), CSLSMSRLT (9)
			Fine Arts	Rebello, Jason	
			Foreign Languages	DeGaulle, Antonette	FL EXP (5), FREN ADV (5), FREN BEG (5), FREN INT (5), CSLSMSRLT (9)
			Foreign Languages	Rebello, Jason	
			French	Rebello, Jason	
			Industrial Arts	Rebello, Jason	
			Mathematics	Fitts, Robert	ALG (5), ALG 2 (5), AP CALC (5), GEN MATH (5), GEOM (5), PRE ALG (5), TRIG/CALC (5), CSLSMSRLT (9)
			Mathematics	Rebello, Jason	

Student Behavior reports

Discipline Profile

This report provides each student's complete discipline history, organized by incident [*Figure 270*]. An administrator at any school can generate results for any student in the district, which include incidents recorded at other schools. By default, PowerSchool SMS sets the report filters to only the selected students.

The report includes only those incidents in which the student is associated with the Event/Concern and that have an Event/Concern whose "Discipline Event/Concern" flag is selected. The student can be a primary involved person, a witness, or a victim.

Figure 270: Discipline Profile Report sample results

Discipline Profile Report

633,053.00

Stan April

10460054

Report Date: December 20, 2004

NB: Only events/concerns and actions involving the selected student are listed

Birth date: February 26,   Gender: Male   Home school grade level: 13   Race:

Incident: 5013   School: Crystal High School   Role: Victim

Incident date: September 01, 2004   Overall severity: Extremely Severe Incident   Referred by: Liza   Allis

Incident description: Following a brief altercation outside the classroom, the offender followed the victim to the stairwell where she repeatedly kicked and punched the victim. Other students witnessing the attack, called a teacher, L. Allis, who intervened.

Event / Concerns:
Event/concern: Battery   Severity: N/A
Category: Discipline Event/Concern Category   Sub-category: Violence

Incident: 5011   School: Crystal High School   Role: Witness

Incident date: February 05, 2004   Overall severity: Mild Incident   Referred by: Josiah   Bogen

Incident description: The students were involved in an altercation in the hallway between period 1 and 2 classes. The argument escalated to shoving and pushing and some clothing items were torn. A student saw the fight and reported the incident to J. Bogen who broke up the fight.

Event / Concerns:
Event/concern: Fighting   Severity: N/A
Category: Discipline Event/Concern Category   Sub-category: Violence

Incident: 5008   School: Crystal High School   Role: Primary

Incident date: March 08, 2004   Overall severity: Moderate Incident   Referred by: Cyrus   Baier

Incident description: The students arrived for class with slurred speech and glassy eyes. C. Baier, their teacher, also reported the students smelled of alcohol. Empty beer bottles were discovered in the boys locker room.

Event / Concerns:
Event/concern: Alcohol   Severity: N/A
Category: Discipline Event/Concern Category   Sub-category: Substance Abuse
Actions and Action Steps:
Action: In-school suspension   Type : N/A   Severity: N/A
Category: Discipline Action Category   Sub-category: Discipline Action Sub-Category
Steps: Discipline Action Step Category   Dates: May 28, 2004 - May 28, 2004
Action: Physical Activity   Type : N/A   Severity: N/A
Category: Discipline Action Category   Sub-category: Discipline Action Sub-Category
Steps: Discipline Action Step Category   Dates: May 28, 2004 - May 28, 2004
Action: Privilege restriction   Type : N/A   Severity: N/A
Category: Discipline Action Category   Sub-category: Discipline Action Sub-Category
Steps: Discipline Action Step Category   Dates: May 28, 2004 - May 28, 2004

Total discipline incidents for student: **3**

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Attendance Phone Register

This report displays student home phone numbers and contact phone numbers for students in a selected homeroom. The report also includes the attendance category (i.e., T for Tardy, A for Absent.)

Figure 271: Attendance Phone Register report sample results

Attendance Phone Register
Anderson Elementary School (2012/2013)
Report Date(s): 07/16/2012

Date: 07/16/2012
Interval: AM

Homeroom	Category	Student Name	Home Phone	Contacts (Relation to Student)	Contact Phone
6A@	T	Alcott, @Elease	1 (604) 555-1940 [h]	Alcott, Clifton (Father) May, Martha P (Stepmother)	604-123-1234 [h] 777-898-1234 [c]
6A@	T	Bravo, Truman	1 (604) 555-5361 [h]	Bravo, Lenny (Father)	1-604-123-1234 [h]
6A@	T	Hawke, Josef	1 (604) 555-2740 [h]	Hawke, Mariana (Mother)	1-604-123-1234 [h]
6A@	A	Kinder, Landon	1 (604) 555-1043 [h]	Kinder, Edmundo (Father)	1-604-123-1234 [h]
6A@	A	Lara, Hildegarde	1 (604) 555-4369 [h]	Lara, Jeanne (Mother)	1-604-123-1234 [h]
6A@	T	Layton, Wendy	1 (604) 555-5605 [h]	Layton, Myron (Father)	1-604-123-1234 [h]

Homeroom Roster Emergency Contacts

Use this report to identify the emergency contacts for students in a selected homeroom. The report displays all homeroom students (with or without emergency contacts), the teacher for the homeroom, and each homeroom student's first two emergency contacts, including: all communication methods for both contacts, the relationship indicators "Lives with", "Gets mailings", "Has custody", "Requires translation", and any medical alerts . You also have the option of including the student's sibling information (name, gender, grade and homeroom)and you can choose to have the report display emergency contacts for incoming students.

Homeroom Roster Emergency Contacts

Anderson Elementary School

2012/2013

Homeroom: 5C   Teacher: Carriere, Jen ; Sepeda, Lawerence ; Petrick, Guillermo

Student: Morefield, Breanne A   Student Number: 10020082   Gender: F

Medical Alert: Bracelet

Contact 1: Maximus, Erica (Babysitter)

Other phone: 5551237878 ext4581

Email: test@test.com

Pager: 6046603434

Cell: 6045551234

Cell: 59876543

Work: 6042941233 4727

Home: 6042289595

Twitter: @twitteracct

Facebook: http://www.facebook.com/profile.php?id=123456

Work: 2070102000

Twitter: http://twitter.com/twitteracct

Cell: 7787146728

Cell: 6841234567

Work: 6044382929 abc123

Home: 7789265454

Email: another@test.com

Pager: 7782356161

Facebook: http://www.facebook.com/fb_username

Work: 59876543

Facebook: http://www.facebook.com/profile.php?id=987654

Lives with student: Yes

Gets mailings: Yes

Has custody: Yes

Requires Greek translation

Contact 2: Morefield, Chet (Father)

Home: 6041231234

Work: 7782941233 4581

Email: testme@nowhere.com

Lives with student: Yes

Gets mailings: Yes

Has custody: Yes

Requires Armenian translation

Student Directory Report

This report displays student demographic information for each student in a selected homeroom, along with each student's contact information, such as address, communication methods, and relationship indicators.

Figure 273: Student Directory Report sample results

Summary reports

ADA/ADM Summary Report

This report enables a School Administrator to tally and compare ADA (Average Daily Attendance, that is, the average number of students per day recorded as "present") and ADM (Average Daily Membership, that is, the average number of students per day enrolled) for a specified date range or attendance period.

This report relies on how the school or district designates the various kinds of days it has set up: a day counted for membership is any day with a value other than 0; a day counted for attendance is any day designated for the taking of attendance.

Membership is calculated according to the Day Value. For example, for a half-day, where no classes are scheduled at all, the Day Value is set to 0.5 and the Take Att value is set to Yes, but the Instructional Day is set to No. If a student was scheduled to attend school for such a day, the student's ADM

reflects only the portion of day enrolled in school, therefore the student's ADM would be 0.5.

Figure 274: ADA/ADM Report sample results

ADA-ADM Summary Report
Crystal High School

Date range: 07/16/2008 - 07/15/2009 (254 Attendance Days and 256 Membership Days)
Using: Values
Format: By grade level

Grade	Start Membership	Entries	Withdrawals	Returns	End Membership	Days Present	Days Absent	Tardies	ADA	ADM
N/A	6	0	0	0	6					5.45
7	2	0	0	0	2	247.000	0.000	0.000	0.97	1.98
8	2	0	0	0	2	238.850	6.150	4.250	0.94	1.98
9	4	496	2	0	498	1,229.000	3.000	0.000	4.84	495.09
10	194	0	0	0	194	7,558.500	97.000	0.000	29.76	192.48
11	352	2	3	0	351	48,369.750	89.500	10.500	190.43	347.27
12	561	1	12	8	558	65,045.250	71.500	13.250	256.08	557.54
13	1	2	0	1	4	979.800	1.950	0.250	3.86	3.97
15	6	0	0	0	6					5.95
16	2	0	0	0	2					1.98
17	6	0	0	0	6					5.95
Total	1,136	501	17	9	1,629	123,668.150	269.100	28.250	486.88	1,619.64

Report options include:

- **Reporting Date**: Sets the date range. **Note:** For **Reporting Date**, if you specify a **Start** or **End** date that falls outside the school calendar, PowerSchool SMS automatically adjusts the date of the report to match that of the school calendar. If both the start and end dates you specify both fall before or both after the school calendar, PowerSchool SMS does not adjust the dates, however the report generates a blank page.

- Calculate attendance statistics using:

  Values: For a report based on values, the report draws on attendance code types (that is, Present, Absent, Tardy) and the values associated with different kinds of days (such as Teaching, Professional Development, Holiday). **Note:** If, for an enrolled student, no attendance is recorded, the report uses a null value.

  Occurrences (number of times the student was given a code): **Note:** If, for an enrolled student, no attendance is recorded, the report considers it as 0 occurrences.

- **Format:**
  By Grade
  By Grade and Gender

Test Management reports

Student Test History

This report lists all the tests each student has taken in the district. This report displays test sessions grouped by test and sorted by test date [*Figure*

275]. A School Administrator or counselor could use this report to determine appropriate programs and courses for the student.

Figure 275: Student Test History report sample results

Student Test History Report
Whitefield High School

Allee, Reggie (11871179)

Gender: Male
Birthdate: Oct 9, 1986
Grade Level: 12

ACT - American College Test

Test Date	School Name	Grade Level	Comment	Pass	Achievement	Development	Final Rating	Percentile	Raw Score
01/19/2005	Whitefield High School	10			5/9	50/99	50/99	55/100	1200/1800

Student Test Profile

This report shows all of the details of a specific test for each student, including subtests and skills [*Figure 276*]. A School Administrator, counselor, or Teacher could use this report to identify a student's weakness in particular areas of study.

Figure 276: Student Test Profile report sample results

Student Test Profile

Anderson Elementary School

Anaya, Derick (10070452)

Gender: Male
Birthdate: Jan 8, 1996
Grade Level: 5
Test Session: Algebra I Session 2
Test: CMATH - C-Math
Subtest(s): Algebra I
Test Date: Oct 10, 2005
Comment:

Component	Pass	Adjective Class	Final Rating	Mastery Score	Percentile	Raw Score
CMATH - C-Math	✓	75		B+	79/100	72/300
Algebra I	✓	69			75/100	70/200
Addition & Subtraction	✓	68	10/10			

Test Scores Below Minimum Requirements

This report lists all students who did not meet minimum requirements for a test session, within a single school or across the entire district [*Figure 277*]. Information on the students includes ethnicity and gender.

Note: This report is only available if a numeric score type (for example, raw score) has been used for the test, and maximum and passing scores have

been entered for that score type. If more than one numeric score type with maximum and passing scores have been defined, the report defaults to the first.

Figure 277: Test Scores Below Minimum Requirements report sample results

Test Scores Below Minimum Requirements

Alta High School

Spring Session

Test:	ACT - American College Test
Subtest:	English
Date Range:	04/03/2006 - 05/31/2006
Grade level:	10
Maximum Score:	English 1000
Passing Score:	English 50

Student Name	Student ID	Gender	Ethnic Category	Test Date	English
Braumberger, Melissa	900000002	F	Black	05/08/2006	2

Test Session Details

This report lists all students who participated in a particular test session, within a single school or across the entire district [*Figure 278*]. Information on the students includes ethnicity and gender.

Figure 278: Test Session Details report sample results

Test Session Details

Chancery School District

Don

Test:	American College Test
Subtest:	Algebra I
Date Range:	03/21/2005 - 03/22/2005
Grade level:	10

Collingwood Collegiate Institute

Student Name	Student ID	Gender	Ethnic Category	Achievement	Development	Final Rating
Smith, Aaron	22020594	M	W	3/9	2/99	1/99

Whitefield High School

Student Name	Student ID	Gender	Ethnic Category	Achievement	Development	Final Rating
Aichele, Olivia	11871019	F	N/A	5/9	6/99	10/99

Test Session Summary

This report compares student results in a test session by gender and ethnicity within a single school or across the entire district [*Figure 279*].

Note: This report is only available if a numeric score type (for example, raw score) has been used for the test, and maximum and passing scores have been entered for that score type. If more than one numeric score type with maximum and passing scores have been defined, the report defaults to the first.

Figure 279: Test Session Summary report sample results

Test Session Summary

Anderson Elementary School

Gr7-Session1 for Algebra II(9/1/05-9/7/05)

Test:	IBMATH- IB Mathematics
Subtest:	Algebra II
Date Range:	09/01/2005 - 09/07/2005
Grade level:	7
Maximum Score:	150
Passing Score:	125

	# students	Hight Score	Low Score	Median	Average Score
Gender					
Female	1	130	130	130.00	130.00
Male	1	130	130	130.00	130.00
Ethnic Category					
N/A	2	130	130	130.00	130.00
Summary					
Total	2	130	130	130.00	130.00

Other reports

PowerTeacher Grades Entry Error Report

For a district using PowerTeacher Gradebook, this report captures synchronization issues that may occur between PowerTeacher Gradebook and PowerSchool SMS. The report shows the number of errors per error type category, along with the total number of errors. The report also provides a detailed breakdown of each grade entry error by reporting period, by school, by teacher, by class, and by student.

Report options include:

- **Error Type Category:**

  Schedule Setup: Select this check box to include Invalid classes and terms.

  Grading Setup: Select this check box to include invalid secondary course grade items, elementary report card items, and grading periods.

  Enrollment (school or class): Select this check box to include Invalid school and class enrollment.

  Invalid grades/comments

  Late grades

PowerSchool SMS built-in reports

Administration reports (built-in)

Student Behavior Summary

This report summarizes the number of disciplinary actions taken in a school by grade and action type [*Figure 280*].

PEARSON

Figure 280: Student Behavior Summary report sample results

Student Behavior Summary Report

Report Date: January 10, 2004 - April 11, 2005

Chancery High

Events and Concerns by grade level			8	9	10	11	12	13	Total
Academic	AIS	Math Low Score	0	0	1	0	0	0	1
Discipline Event/Concern	Academic	Cheating in Class	0	0	0	0	0	1	1
	Attendance	Cutting Class	0	0	1	1	0	0	2
	Criminal Offence	Felony	0	0	0	1	0	0	1
		Theft	0	0	0	1	0	0	1
	Misdemeanor	Bus Misconduct	0	1	0	1	0	0	2
		Disrespect	0	1	2	0	0	0	3
		Disruptive Behavior	1	1	2	0	1	0	5
		Unsportsmanlike Co	1	0	2	1	0	1	5
	Other	Other	0	0	0	1	0	0	1
		Trespassing	1	0	1	0	0	0	2
		Violation Code	0	0	2	0	1	0	3
	Violence	Harrassment	0	0	1	0	0	0	1
		Unprovoked Assault	1	0	0	0	0	0	1
	Weapons	Use/Poss Knife	1	0	0	0	0	0	1
		Total	5	3	12	6	2	2	30

Report options include:

- **Report Date From/Report Date To**: Sets the date range. The default is Today.
- **Report Version**: Specifies whether the report should include Events/Concerns or Actions, and how the information is to be sorted (by grade level, gender, age, or ethnicity).

School Calendar List

Figure 281: School Calendar List report sample results

School Calendar List Report

Arlington High School

School Calendar for August 15, 2004 to April 11, 2005

Date	Event
August 15, 2004	Start of attendance reporting period 1
August 31, 2004	Exception Day 1
September 20, 2004	Labour day
October 11, 2004	Thanksgiving Day
October 12, 2004	School Holiday
October 27, 2004	Exception Day 2
November 05, 2004	End of attendance reporting period 1
November 08, 2004	Start of attendance reporting period 2
November 11, 2004	Remembrance Day
December 07, 2004 - December 10, 2004	Winter outdoor schl
December 24, 2004	Christmas Holiday
December 27, 2004 - December 31, 2004	Christmas Holiday
January 03, 2005 - January 04, 2005	Christmas Holiday
January 18, 2005	Mid year conference
February 22, 2005	End of attendance reporting period 2
February 26, 2005	Start of attendance reporting period 3
March 29, 2005	Prof day Mar
April 01, 2005	Good Friday

Student Change History

Student Change History Report
Chancery High

Changes from Jul 1, 2004 to Apr 11, 2005

Homeroom: N/A --

Student Name	Number	Gr	Change Type	Effective Date	Changed by User	On	Comment
Abbott, Daline	9901243499	11	Drop from JUNIOR ENG 4	01/05/2005	Becker, Paul	01/06/2005	
Acosta, Trilauni L	9900850933	12	Add to TEAM SPTS 3	07/01/2004	Becker, Paul	03/21/2004	
			Drop from TEAM SPTS 3	12/31/2004	Becker, Paul	03/21/2004	
			Add to TEAM SPTS 2	01/01/2005	Becker, Paul	03/21/2004	
Allen, Ariel R	9901077974	10	Drop from ADVISE-10 4	11/03/2004	Myers, George	11/04/2004	
			Drop from PE - HS 3	11/03/2004	Myers, George	11/04/2004	
Allsop, Blair A	9900756331	12	Add to SPAN ADV 1	07/01/2004	Becker, Paul	07/25/2004	
Bell, Marfius M	9990560420	10	Add to SOPH READ 1	07/01/2004	Becker, Paul	07/25/2004	
			Drop from SOPH READ 1	12/31/2004	Becker, Paul	07/25/2004	
Blaise, Maria D	9901138297	11	Transfer from Grade 12 to 11	11/16/2004	Becker, Paul	11/16/2004	
Brody, Greg	9999016707	10	Transfer to Homeroom N/A	07/01/2004	Becker, Paul	01/06/2005	
			Transfer to Grade 12	07/01/2004	Becker, Paul	01/06/2005	
			Transfer from Grade 12 to 10	07/02/2004	Becker, Paul	01/06/2005	
Campbell, Crystal L	9901109693	9	Add to INT DES 1	07/01/2004	Becker, Paul	07/25/2004	
			Drop from INT DES 1	12/31/2004	Becker, Paul	07/25/2004	
Cohen, Antoinne C	9903171197	7	Add to HEALTH - M 3	07/01/2004	Becker, Paul	07/25/2004	
			Drop from HEALTH - M 3	12/31/2004	Becker, Paul	07/25/2004	
			Add to HEALTH - M 4	01/01/2005	Becker, Paul	07/25/2004	
Diaz, Caleb J	9901188727	8	Add to PE - MS 1	07/01/2004	Becker, Paul	07/25/2004	
			Drop from PE - MS 1	12/31/2004	Becker, Paul	07/25/2004	
			Add to PE - MS 2	01/01/2005	Becker, Paul	07/25/2004	
Donaldson, Colleen A	9903171200	7	Add to HEALTH - M 3	07/01/2004	Becker, Paul	04/21/2004	
			Drop from HEALTH - M 3	12/31/2004	Becker, Paul	04/21/2004	
			Add to HEALTH - M 4	01/01/2005	Becker, Paul	07/25/2004	

School Conversion Log

Figure 283: School Conversion Log report sample results

Conversion Information - Detail

Chancery High

Severity	Date/Time	Description
Information	6/5/2003 11:52:46 AM	Conversion Started
Information	6/5/2003 11:52:46 AM	Converting attendance codes
Information	6/5/2003 11:52:46 AM	Converting school homerooms
Information	6/5/2003 11:52:46 AM	Setting up student change history
Information	6/5/2003 11:52:46 AM	Setting up school alerts
Information	6/5/2003 11:52:46 AM	Setting school type to Chancery SMS .NET Enhanced
Information	6/5/2003 11:52:46 AM	Conversion completed successfully

Security Audit Summary

: Security Audit Summary report sample results

Security Audit Summary Report

From: 3/12/2005
To: 4/12/2005

School:	N/A
Unique Users:	2
Mac Logons:	0
PC Logons:	59
Total Logons:	59

School:	Chancery High
Unique Users:	3
Mac Logons:	0
PC Logons:	64
Total Logons:	64

School:	Cypress Elementary
Unique Users:	3
Mac Logons:	0
PC Logons:	22
Total Logons:	22

School:	Seymour Elementary
Unique Users:	1
Mac Logons:	0
PC Logons:	1
Total Logons:	1

Security Audit Details (by Time)

Figure 285: Security Audit Details report sample results

Security Audit Details Report (by Time)

From: 7/23/2002
To: 8/23/2002

School: N/A

Time	User	IP Address	Platform/Browser	Event
8/21/2002 12:41:22PM	Administrator, Admin	10.1.60.200	Win2K/IE 6.0	Log On
8/21/2002 12:52:25PM	Administrator, Admin	10.1.60.200	Win2K/IE 6.0	Log On
8/21/2002 12:54:02PM	Administrator, Admin	10.1.30.250	Win2K/IE 6.0	Log On
8/21/2002 12:56:00PM	Administrator, Admin	10.1.30.250	Win2K/IE 6.0	Log Off

A **IP Address**: The IP address of the user's computer at the time of the Event.

B **Platform/Browser**: The computer operating system on the user's computer and the browser [p. 31] he or she used at the time of the event.

Attendance reports (built-in)

Attendance Exceptions Student List

Attendance Exceptions Student List Report

Chancery High

| Reporting Criteria: | | **"20+" Excessive absence rule** | | | | |
| Count Within: | | Year To Date | | | | |

Gr	HR	Student Name	Rule Met Date	Gender	Contact	Total Times
11	N/A	Abbott, Daline	Apr 07, 2005	F	Abbott, Shikha (Mother) [h] 1 (360) 297-6799	27.00
12	N/A	Johnson, Cortez A	Dec 31, 2004	M	Johnson, Myrna (Mother) [h] 1 (360) 578-9140	79.00
12	N/A	Johnson, Valerie	Dec 31, 2004	F	Johnson, Falguni (Mother) [h] 1 (360) 294-0785	79.00
11	N/A	Jones, Janitzia J	Apr 11, 2005	F	Jones, Damalis (Mother) [h] 1 (360) 425-7084	43.00

| Reporting Criteria: | | **"5-9" Excessive absence rule** | | | | |
| Count Within: | | Year To Date | | | | |

Gr	HR	Student Name	Rule Met Date	Gender	Contact	Total Times
10	N/A	Barnes, Nickes G	Feb 24, 2005	M	Barnes, Araxie (Mother) [h] 1 (360) 295-5501	6.00

Grading reports (built-in)

Elementary Progress

Appears in the Reports menu on a student search results page [p. 50] [p. 37].

Centennial High School East

3rd Interim MP Progress Report (2004-2005)

Student: Caitlin McGill		Student No:	**9200074**		Grade:	11		Homeroom:	CAF1

Course Name	1IE	2I	1IG	2IE	2IG	3I	3IE	3IG	
ALGEBRA 2R (221) J Russo		80	D	1	B	88	1	B	
APPLIED CHEMISTRY R (332) D Grubb	1	90	C	2	D	89	1	B	
COOKING TECHNIQUES-SEM (880) P Dilba		96	A	1	A				
ENGLISH 3R (132) T Silverstein		88	A	1	B	89	1	B	
HEALTH 11 (3013) R James						85	1	B	
PHYS ED 11 (3003) E PE Staff		81		1	A				
SAT REVIEW-SEM (174) S Choi, R Rocchino	2	76	D	2	E				
SPANISH 3A (651) G Hunt	1	79	B	1	B	80	1	A	
US HISTORY 2A (521) C Mason-Smith	1	82	C	2	E	81	1	C	

Elementary Report Card

Appears in the Reports menu on a student search results page [p. 50].

Figure 288: Report Card - Elementary report sample results

Report Card for Kindergarten: Report Card Period 3 (2002/2003)

Parker Elementary Chancery School District	Student: Curtis Adams Teacher: E Peabody, T Pratt	Grade: K HR: K

Achievement Code		Mastery of Skills		Learning Behaviors	
☺	Above Grade Level	E	Exceeds expectations	S	Satisfactory
☺	On Grade Level	M	Meets expectations	N	Needs Improvement
☹	Below Grade Level	B	Below expectations		

	RP1	RP2	RP3
LANGUAGE ARTS			
Listening & Speaking	☹	☺	☺
Listens attentively while others speak.	M	M	M
Speaks audibly.	M	M	M
Uses appropriate language and grammar.	M	M	E
Contributes to class discussions	M	M	E
Expresses ideas clearly.	M	E	M
Handwriting	☹	☺	☺
Prints correctly letters of the alphabet, taught to date, in lowercase.	B	M	B
Prints correctly letters of the alphabet, taught to date, in uppercase.	M	M	M
Expresses creative ideas through drawing and writing.	M	M	M
Reading	☺	☺	☺
Participates in story discussions.	M	M	E
Reads with understanding.	M	M	M
Identifies rhyming words.	M	M	E
Identifies consonant sounds.	M	B	E
Identifies vowel sounds.	M	E	E

Subject Comments

Curtis demonstrates the ability to do well in all three areas of Language Arts. He needs to work on his ability to print lowercase letters and I practice outside school hours. I enjoy Curtis's eagerness to do well in Language Arts.

	RP1	RP2	RP3
MATHEMATICS	☺	☺	☺
Identifies geometric shapes.	M	M	M

	RP1	RP2	RP3
Identifies numerals.	M	M	M
Identifies numbers out of sequence.	M	M	B
Compares amounts (more, less, equal).	M	B	M
Adds and subtracts using obects.	M	M	M
Recognizes and extends patterns.	M	M	B

Subject Comments

Curtis demonstrates enthusiasm to learn in the area of mathematics. He needs to work on his ability to recognize patterns and number sequences. His ability to problem solve in teams is amazing.

	RP1	RP2	RP3
SCIENCE	☹	☹	☹
Demonstrates an understanding of basic science concepts.	B	M	B
SOCIAL STUDIES	☺	☺	☺
Demonstrates an understanding of basic concepts taught.	B	M	M
MUSIC	☺	☺	☺

Participation

Curtis actively participates in music activities. However, he needs to strengthen his skills in the area of memorizing song lyrics.

	RP1	RP2	RP3
PHYSICAL EDUCATION	☹	☹	☹

Participation

Curtis does not actively participate in physical education activities. He needs work in this area. However, when Curtis does choose to participate, he

Secondary Progress

Appears in the Reports menu on a student search results page [p. 50].

Figure 289: Secondary Progress report sample results

Centennial High School East

3rd Interim MP Progress Report (2004-2005)

Student: Caitlin McGill			Student No: 9200074			Grade: 11		Homeroom: CAF1
Course Name	1IE	2I	1IG	2IE	2IG	3I	3IE	3IG
ALGEBRA 2R (221) J Russo		80	D	1	B	88	1	B
APPLIED CHEMISTRY R (332) D Grubb	1	90	C	2	D	89	1	B
COOKING TECHNIQUES-SEM (880) P Dilba		96	A	1	A			
ENGLISH 3R (132) T Silverstein		88	A	1	B	89	1	B
HEALTH 11 (3013) R James						85	1	B
PHYS ED 11 (3003) E PE Staff		81		1	A			
SAT REVIEW-SEM (174) S Choi, R Rocchino	2	76	D	2	E			
SPANISH 3A (651) G Hunt	1	79	B	1	B	80	1	A
US HISTORY 2A (521) C Mason-Smith	1	82	C	2	E	81	1	C

Secondary Report Card

Appears in the Reports menu on a student search results page [p. 50].

Figure 290: Secondary Report Card report sample results

11220 Wallace Avenue
Texas City, TX 60628
Phone: 1 (360) 294-1233
Fax: 1 (360) 594-2225

Chancery High
Chancery School District

Principal: Daniel Robertson

Final Report Card (2004-2005)

| Student: Blair Alexander Allsop | | | | Student No: 9900756331 | | | | | Grade: 12 | | Homeroom: N/A | |

Course Name	1	2	3	S1Ex	S1	CE	4	5	6	S2Ex	S2	CE	AVG
Advanced Placement English (LA55632) P Woo	90	93	95	97	95	0.500	90	90	90	90	90	0.500	93
Physics (SCI9978) I Newton	80	84	88	90	88	0.500	80	79	80	90	84	0.500	82
Advanced Placement Calculus (MATH9987) T Cavein	90	91	92	93	92	0.500	90	80	80	80	83	0.500	87
Government (SSS8765) D Hartman	85	85	85	85	85	0.500	80	85	80	88	84	0.500	85
Spanish - Advanced (FLS8845) P Nasmyth	90	88	87	77	87	0.500	90	88	79	82	83	0.500	84
Photography (ART3388) S Reiber	93	88	89	91	89	0.250							

Attendance	1	2	3	4	5	6	Total
Days Present	64.0	35.0	35.0	42.0	38.0	38.0	252.0
Days Absent	8.0	0.0	0.0	0.0	0.0	0.0	8.0
Times Tardy	0	0	0	0	0	0	0

_____

Parent / Guardian Signature:

Award Certificate

Refer to *Awards setup* [p. 214].

Contact Mailing Labels

Figure 291: Contact Mailing Labels report sample results

Contact for: *Shaquanda Betts*
Iva Betts
2934 Ruddell Rd SE
Olympia, WA 98501
USA

Contact for: *Alex Joseph*
Eilis Joseph
7837 Martin Way E
Olympia, WA 98516-5750
USA

Contact for: *Tiffany Hair*
Dara Hair
1915 Water St SW
Olympia, WA 98501-2853
USA

Contact for: *Willie Heard*
Ishana Heard
5541 Cricket Ln SE
Olympia, WA 98503-8021
USA

Contact for: *Samuel Young*
Zee Young
1308 Alonda Ln NE
Olympia, WA 98516-3743
USA

Contact for: *Christopher Gardner*
Sarea Gardner
6821 Foothill Loop SW
Olympia, WA 98512-2077
USA

Contact for: *Kylund Vickers*
Shelah Vickers
2502 Division St NW
Olympia, WA 98502-4245
USA

Contact for: *Ariel Allen*
Renuka Allen
2401 Bristol Ct SW
Olympia, WA 98502-6061
USA

Contact for: *Ernest Davis*
Pulkita Davis
2828 Westwood Dr NW
Olympia, WA 98502-3835
USA

Contact for: *Carl Santiago*
Sapna Santiago
1243 Alki Ct NE
Olympia, WA 98516-5939
USA

Contact for: *Chemeka Brown*
Joelliane Brown
1608 22nd Ave SE
Olympia, WA 98501-3020
USA

Contact for: *Arelis Moore*
Shobi Moore
3600 Elizabeth St SE
Olympia, WA 98501-7446
USA

Contact for: *Demeras Harrison*
Ariel Harrison
4111 104th Ave SW
Olympia, WA 98512-1011
USA

Contact for: *Tashira Norfleet*
Janna Norfleet
4416 Langley Pl NE
Olympia, WA 98501
USA

Contact for: *Temeka Mccullough*
Srishti Mccullough
9221 46th Ave NE
Olympia, WA 98516-2307
USA

Contact for: *Antonio Lucas*
Ambika Lucas
5022 Meridian Rd SE
Olympia, WA 98513-4808
USA

Contact for: *Bridget Anderson*
Faina Anderson
645 Malibu Dr SE
Olympia, WA 98503-1367
USA

Contact for: *Crystal Baker*
Nandita Baker
600 Black Lake Blvd SW
Olympia, WA 98502-5053
USA

Contact for: *Krystal Daou*
Kusum Daou
115 N 2nd Ave SW
Olympia, WA 98512-6502
USA

Contact for: *Luxna Stephenson*
Rajni Stephenson
934 Israel Rd SE
Olympia, WA 98501-6307
USA

Contact for: *Ricky Fant*
Adhira Fant
3525 Ensign Rd NE
Olympia, WA 98506-5065
USA

Homeroom Roster by Gender

Figure 292: Homeroom Roster by Gender report sample results

Homeroom Roster by Gender
Parker

Homeroom: H04 - J Batchelor
Teacher: Batchelor, Jill

Female

Anspach, Janna
Boe, Florine
Crisman, Lucille
Doan, Oliva
Estey, Debroah
Gambrel, Shelly
Kaufmann, Teofila
Mikula, Randa
Rhoten, Kristeen
Sailer, Shay
Schull, Shakita
Schulze, Libbie
Yocom, Mora

Male

Bates, Woodrow
Boll, Mauricio
Bussiere, Louie
Coppin, Alec
Lamkin, Del
Mike, Lonny
Mogensen, Geoffrey
Rowen, Errol
Scogin, Man
Sheckler, Ed
Timmins, Antony
Woodie, Huey

Homeroom Roster report

Figure 293: Homeroom Roster report sample results

Homeroom Roster
Parker Elementary

Homeroom: 1-A
Teacher: Anita, Dekleva; Peters, Andrew

StudentName	Monday	Tuesday	Wednesday	Thursday	Friday
Allen, Kiaisha					
Banks, Natasha					
Beasley, Kedric a					
Boulware, Shade					
Carpenter, Bonnie					
Carroll, Chasity					
Hill, Josh					
Mustafa, Pilar					
Owen, Melissa					
Padilla, Rebecca					
Phillips, Brandy					
Phillips, Michael					
Richardson, Marcello					
Richter, Jimmy					
Roberts, Angela					
Ross, Kylie					
Sanders, Kendra					
Simmington, Jason					
Simmons, Terry					
Steward, Lakisha					
VANCE, Auto					
Ward, Tamaranku					
Ward, Tonya					
York, Hilary					

Student Birthday List

Figure 294: Student Birthday List report sample results

Student Birthday List Report
Cypress Elementary

Birthdays: Jan 1 to Dec 24

Homerooms: 115

StudentName	Birthday	Age	Gender	Grade	Homeroom
Tompkins, Christian E	Jan 18	7	M	1	115
Mackey, Kevin M	Jan 29	7	M	1	115
Ingleson, Kamran	Mar 2	7	M	1	115
Andrews, Samantha L	Mar 27	7	F	1	115
Vickers, Jasmine M	Apr 17	7	F	1	115
Jackson, Jeffrey	May 5	7	M	1	115
King, Steven L	Jun 7	7	M	1	115
Cohen, Ashley L	Jun 20	7	F	1	115
O'Brien, Melissa N	Aug 25	7	F	1	115
Quigley, Philip H	Oct 21	7	M	1	115
Eisley, Zachary R	Dec 6	7	M	1	115

Student List

Figure 295: Student List report sample results

Student List Report
Parker Elementary

Student Name	Number	Grade	Homeroom	Gender	Birthdate
Allen, Kiaisha	6016021	1	1-A	F	Jun 5, 1997
Banks, Natasha	6016061	1	1-A	F	Jun 11, 1995
Beasley, Kedric a	6016099	1	1-A	M	Dec 13, 1979
Boulware, Shade	6016131	1	1-A	M	Oct 25, 1997
Carpenter, Bonnie	6016206	1	1-A	F	Mar 18, 1996
Carroll, Chasity	6016210	1	1-A	F	Sep 3, 1980
Carter, Audra	6016215	1	1-B	F	Apr 20, 1997
Castillo, Danny	6016225	1	1-B	M	Apr 4, 1979
Childress, Jeffrey	6016244	1	1-B	M	Oct 15, 1979
Gallamore, Joshua	6016427	1	1-B	M	May 6, 1997
Garcia, Susan	6016437	1	1-B	F	Feb 6, 1981
Glidewell, Jeffrey	6016455	1	1-B	M	Jul 18, 1997
Guerra, Odie	6016500	1	1-B	F	Mar 13, 1981
Hairell, Aundria	6016513	1	1-B	F	Sep 5, 1997
Hambrick, Christy	6016520	1	1-B	F	Jun 1, 1997
Hill, Josh	6016573	1	1-A	M	Apr 15, 1997
Maddox, Scott	6016750	1	1-B	M	Feb 14, 1997
Mariscal, Rita	6016763	1	1-B	F	May 22, 1997
Mustafa, Pilar	6016873	1	1-A	F	Nov 29, 1979
Nash, Patrick	6016875	1	1-B	M	Jan 2, 1981
Nelson, Michael	6016878	1	1-B	M	Oct 7, 1997
Noble, Philip	6016886	1	1-B	M	Sep 14, 1997

Student Mailing Labels

Figure 296: Student Mailing Labels report sample results

ELIZABETH M ANDREWS
3318 COOPER POINT RD NW
OLYMPIA WA 98502-3872

SATURDAY ALEXANDER AVERETT
1224 FERN ST SW
OLYMPIA WA 98502-7210

ERICA D ANDREWS
8921 83RD AVE SE
OLYMPIA WA 98513-5649

THOMAS JAMES AVERETT
1605 PROSPECT AVE NE
OLYMPIA WA 98506-4548

JUDY NICOLE ANDREWS
650 NISQUALLY CUT OFF RD SE
OLYMPIA WA 98513-9616

CRYSTAL MONIQUE BAKER
600 BLACK LAKE BLVD SW
OLYMPIA WA 98502-5053

JIMMIE LEE ANTHONY FUNDERBURK
1221 MOTTMAN RD SW
OLYMPIA WA 98512-0405

MICHAEL G BAKER
1617 ELIZABETH ST SE
OLYMPIA WA 98501-2710

LAUREN ANTHONY
3011 59TH CT SE
OLYMPIA WA 98501-5301

TINA M BAKER
1800 ETHRIDGE CT NE
OLYMPIA WA 98506-3374

KYLE DAVID ANTONIAZZI
5001 COLLEGE ST SE
OLYMPIA WA 98503-5943

STEVEN BALAUAT
5218 33RD CT SE
OLYMPIA WA 98501

MEGAN ELIZABETH ARCE
2501 PROSPECT AVE NE
OLYMPIA WA 98506-4862

ASHLEY ROSE BARGNARE
6110 JANET DR SW
OLYMPIA WA 98501-5223

Student Medical

Figure 297: Student Medical report sample results

Student Medical Information
Parker Elementary

Homeroom 1-A

Name: Allen, Kiaisha
Number: 6016021   **Gender:** Female
Grade: 1   **Birth Date:** June 5, 1997

Medical Number:

Disability:

Permission to Call Doctor: Yes   **Call Ambulance:** Yes   **Treat:** Yes

Medical Alert:

Doctor Name:

Doctor Phone(s):

Doctor Address:

Name: Banks, Natasha
Number: 6016061   **Gender:** Female
Grade: 1   **Birth Date:** June 11, 1995

Medical Number:

Disability:

Permission to Call Doctor: Yes   **Call Ambulance:** Yes   **Treat:** Yes

Medical Alert: Has asthma - requires inhaler

Doctor Name: Dr Beth Logan

Doctor Phone(s):

Doctor Address:

Summary reports (built-in)

Age Breakdown Summary

Age Breakdown Summary Report
Arlington High School

Age calculated as of April 11, 2005

Homeroom: N/A (2,345 students)

Age	Total #	Total %
13	1	0.04%
15	186	7.93%
16	519	22.13%
17	639	27.25%
18	788	33.60%
19	212	9.04%

Total for selected homerooms (2,345 students)

Age	Total #	Total %
13	1	0.04%
15	186	7.93%
16	519	22.13%
17	639	27.25%
18	788	33.60%
19	212	9.04%

Daily Attendance Summary

Daily Attendance Summary Report

Arlington High School

Start date: Jan 5, 2005   End Date: **Feb 4, 2005**

Grade: 10   Using attendance code values.

	Total Absences		Total Tardies		Total
Date	**Excused**	**Unexcused**	**Excused**	**Unexcused**	**Presents**
Jan 05, 2005	0	0	1	0	170
Jan 06, 2005	0	0	0	0	170
Jan 07, 2005	0	0	0	0	170
Jan 10, 2005	0	0	0	0	170
Jan 11, 2005	0	0	0	0	170
Jan 12, 2005	0	0	0	0	170
Jan 13, 2005	0	0	0	0	170
Jan 14, 2005	0	0	0	0	170
Jan 17, 2005	0	0	0	0	170
Jan 18, 2005	0	0	0	0	170
Jan 19, 2005	0	0	0	0	170
Jan 20, 2005	0	0	1	0	170
Jan 21, 2005	0	0	0	0	170
Jan 24, 2005	0	0	0	0	165
Jan 25, 2005	3	2	1	1	165
Jan 26, 2005	2	3	0	1	165
Jan 27, 2005	2	3	0	3	165
Jan 28, 2005	3	2	0	0	165
Jan 31, 2005	4	1	1	0	165
Feb 01, 2005	0	0	1	0	170
Feb 02, 2005	0	0	2	0	170
Feb 03, 2005	0	0	0	4	170
Feb 04, 2005	0	0	3	0	170

Ethnicity by School and Grade

Student Ethnicity by School and Grade
Current as of Tuesday, November 22, 2005

	%
American Indian	2.1%
Asian	4.3%
Black	16.7%
Hispanic	24.5%
N/A	0.4%
Pacific Islander	2.7%
White	49.3%
Total:	100.0%
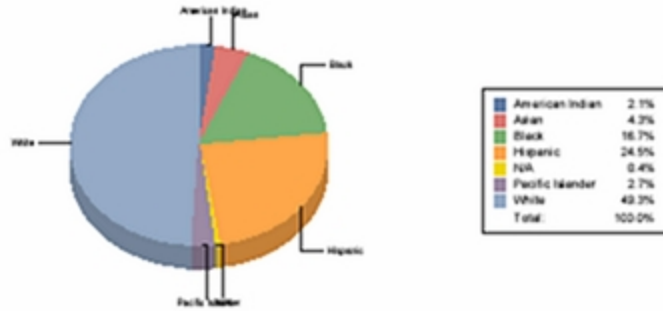
		American Indian	Asian	Black	Hispanic	N/A	Pacific Islander	White	Total
Chancery High	5	5		1	13			16	30
	6		6	4	7	16		8	41
	7		4	12	28	29		10	55	138
	8		4	6	5	8	1	5	1	30
	9			2	14	36			47	99
	10			4	12	35	1		51	103
	11				19	23	1		61	104
	12				10	27			66	103
	Total	14	29	108	174	3	23	297	648
	Total	14	29	108	174	3	23	297	648

Home Language Summary

Home Language Summary Report
Parker

Homeroom: H04 (25 students)

Chinese	2	8.00%
English	4	16.00%
Greek	1	4.00%
N/A	15	60.00%
Spanish	3	12.00%

Total for selected homerooms (25 students)

English	4	16.00%
Spanish	3	12.00%
N/A	15	60.00%
Greek	1	4.00%
Chinese	2	8.00%

Student Graduation Status

Figure 302: Student Graduation Status report sample results

Student Graduation Status Report
Chancery High School

Student ID: 9900756427   **Assigned Plan:** 2003 - General Graduation Plan
Student Name: Brody, Greg
Grade: 12

	Credits Required	Credits Completed	Credits In Progress	Credits Outstanding
Language Arts	**4**	**2**	**1**	**1**
Freshman English	1	1		0
Sophomore Reading	0.5	0		0.5
Sophomore Writing	0.5			
Junior English	1	1		0
Senior English	1		1	0
Advanced Placement	1			
Mathematics	**2**	**2**	**1**	**-1**
Algebra	1	1		0
Geometry	1			
Algebra II	1	0		1
Trigonometry/Pre-Calculus	1	1	1	-1
Advanced Placement	1			
Science	**2**	**2**		**0**
Physical Science	1	1		0
Biological Science	1			
Chemistry	1	1		0
Physics	1			
Social Studies	**4**	**1**	**1**	**2**
Government	1			
Advanced Placement	1			
Ancient Civilizations	0.5			
European History	0.5		0.5	0
Current Events	0.5	0.5	0.5	-0.5
Middle Eastern History	0.5			
Geography	0.5	0.5		0
US History - 1945 to	0.5			
Electives	**7**	**3**	**4**	**0**
Theatre Production	0.5			
Sets & Lighting	1	1		0
Symphonic Band	1			
Concert Choir	1			
Interior Design	0.5			
Architectural Drafting	0.5			
Spanish - Intermediate	1			
Spanish - Advanced	1			
French - Intermediate	1			
French - Advanced	1		1	0
German - Intermediate	1	1		0
German - Advanced	1	1		0
Accounting Principles	0.5		0.5	0
Business Ethics	0.5		0.5	0
Business Internship	2		2	0
Drawing & Painting	0.5			
Photography	0.5			
Sculpture	0.5			
Physical Education	**1**			
Physical Education - High	0.5			
Individual Sports	0.5			
Team Sports	0.5			
Total Plan	**20**	**10**	**7**	**3**

SMS-HC-ACP-00000 Ver:00-1
Admin Administrator

Page 1 of 1

Oct 13, 2003 1:54 PM

Daily attendance code calculation rules planning worksheets

The following sample worksheets [*Table 83*, p.615] [*Table 86*, p.617] enable you to plan the rules by which PowerSchool SMS calculates each student's daily attendance code [p. 189].

Table 83: **Worksheet for a Twice-daily to daily attendance code calculation rules**
(*Table 84* **[p. 616] and** *Table 85* **[p. 616] show completed samples)**

	Rule Set Name:	
	Date created/revised:	
	Created/revised by:	
	Purpose:	
Rule 1	**Scheduling Group**	
	Day	
	AM Code	
	PM Code	
	Daily Code	
Rule 2	**Scheduling Group**	
	Day	
	AM Code	
	PM Code	
	Daily Code	
Rule 3	**Scheduling Group**	
	Day	
	AM Code	
	PM Code	
	Daily Code	
Rule 4	**Scheduling Group**	
	Day	
	AM Code	
	PM Code	
	Daily Code	

Rule 5	Scheduling Group	
	Day	
	AM Code	
	PM Code	
	Daily Code	
Notes:		

Table 84: Completed sample of *Table 83* [p. 615]

	Rule Set Name:	Present Daily if Present in AM or PM
	Date created/revised:	June 30, 2008
	Created/revised by:	Sheryl Allen
	Purpose:	District policy states that if a student comes to school at any one point during the day – even for only a minute – that student is counted as present on that date. Therefore, assign a Present daily attendance code to those students that attend school either in the morning, in the afternoon, or all day.
	Scheduling Group	All
	Day	Day 4
Rule 1	AM Code	Any Presence
	PM Code	Ignore
	Daily Code	Present
Rule 2	AM Code	Ignore
	PM Code	Any Presence
	Daily Code	Present
Rule 3	AM Code	Any Absence
	PM Code	Any Absence
	Daily Code	Absent
Notes:		

Table 85: Completed sample of *Table 83* [p. 615]

	Rule Set Name:	Present Daily if Present in AM or PM
	Date created/revised:	June 30, 2008
	Created/revised by:	Sheryl Allen
	Purpose:	Our school uses custom "Absent/Present" and "Present/Absent" daily

		codes to track morning and afternoon attendance. Therefore, separate rules calculate morning and afternoon kindergarten classes, as well as for students that attend all day.
	Scheduling Group	Full Day
	Day	Day 3
Rule 1	AM Code	Any Absence
	PM Code	Any Presence
	Daily Code	Absent/Present
Rule 2	AM Code	Any Presence
	PM Code	Any Absence
	Daily Code	Present/Absent
	Scheduling Group	AM Only
	Day	Day 3
Rule 3	AM Code	Any Presence
	PM Code	Any Presence
	Daily Code	Present
	Scheduling Group	PM Only
	Day	Day 3
Rule 3	AM Code	Any Absence
	PM Code	Any Absence
	Daily Code	Absent

Table 86: Worksheet for a Class (Period) to daily attendance code calculation rules (*Table 87* [p. 618] shows a completed sample)

	Rule Set Name:	
	Date created/revised:	
	Created/revised by:	
	Purpose:	
	Scheduling Group	
	Day	

Rule 1	Code in Period 1	
	Code in Period 2	
	Code in Period 3	
	Code in Period 4	
	Code in Period 5	
	Code in Period 6	
	Daily Code	
Rule 2	Code in Period 1	
	Code in Period 2	
	Code in Period 3	
	Code in Period 4	
	Code in Period 5	
	Code in Period 6	
	Daily Code	
Rule 3	Code in Period 1	
	Code in Period 2	
	Code in Period 3	
	Code in Period 4	
	Code in Period 5	
	Code in Period 6	
	Daily Code	
Rule 4	Code in Period 1	
	Code in Period 2	
	Code in Period 3	
	Code in Period 4	
	Code in Period 5	
	Code in Period 6	
	Daily Code	
Notes:		

Table 87: Completed sample of *Table 86* [p. 617]

	Rule Set Name:	
	Date created/revised:	June 30, 2008

	Created/revised by:	Sheryl Allen
	Purpose:	District policy states that if a student is present for the second period, that student is counted as present on that date.
	Scheduling Group	All
	Day	Day 5
Rule 1	**Code in Period 1**	Ignore
	Code in Period 2	Present
	Code in Period 3	Ignore
	Code in Period 4	Ignore
	Code in Period 5	Ignore
	Code in Period 6	Ignore
	Daily Code	Present
Rule 2	**Code in Period 1**	Ignore
	Code in Period 2	Absent
	Code in Period 3	Ignore
	Code in Period 4	Ignore
	Code in Period 5	Ignore
	Code in Period 6	Ignore
	Daily Code	Absent

Permissions catalog

This sections describes in detail each of the permissions available in PowerSchool SMS 8.0.

The permission categories are:

- *Academic Planning permissions* [p. 620]
- *Admin permissions* [p. 622]
- *Advanced Reporting permissions* [p. 623]
- *Attendance permissions* [p. 625]
- *District permissions* [p. 633]
- *Enrollment/Program Queues permissions* [p. 656]
- *Export permissions* [p. 665]
- *Facilities Management permissions* [p. 668]
- *Families permissions* [p. 669]
- *Gradebook permissions* [p. 671]
- *Grading permissions* [p. 672]
- *Import permissions* [p. 681]
- *Program Category permissions* [p. 687]
- *Reporting permissions* [p. 694]

- *School Setup permissions* [p. 702]
- *School Specific Pages Only permissions* [p. 731]
- *Schools permissions* [p. 732]
- *Setup Lists permissions* [p. 736]
- *Staff permissions* [p. 751]
- *State Reporting permissions* [p. 756]
- *Student Behavior permissions* [p. 759]
- *Students permissions* [p. 764]
- *Test Management permissions* [p. 799]
- *Transcript/Permanent Record permissions* [p. 801]
- *Users permissions* [p. 805]

Academic Planning permissions

Permissions in this category pertain to use and creation of academic plans [p. 100]. These permissions include:

- *Graduation Plans* [p.620]
- *Mass Assign Academic Plan permission* [p. 620]
- *Override Student Academic Plan Version permission* [p. 621]
- *Student Academic Plan permission* [p. 621]
- *Student Academic Plan Notes permission* [p. 622]

Graduation Plans

This permission controls the user's ability to access the Graduation Plans page. **Note:** If you are a new customer, do not set up Graduation Plans; rather, use the Academic Planner functionality [p. 269]. Graduation Plan functionality will be discontinued in a future version of PowerSchool SMS.

Mass Assign Academic Plan permission

This permission controls the user's ability to assign an academic plan to more than one student at a time [p. 105].

Dependencies: None

Settings:

- **Yes**: The user can assign an academic plan to more than one student at a time.
- **No**: The user is able to assign an academic plan to only one student at a time.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**

- District Health Professional: **No**

Override Student Academic Plan Version permission

This permission controls the user's ability to change a student's assigned academic plan [p. 105], which can be "in progress".

Dependencies: None

Settings:

- **Yes**: The user can change the academic plan assigned to a student.
- **No**: The user is unable to change the academic plan assigned to a student.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Student Academic Plan permission

This permission controls the user's ability to assign an academic plan to a student and work with its information [p. 100].

Dependencies:

- The setting for this permission takes precedence over that of the *Student Academic Plan Notes permission* [p. 622].

Settings:

- **Delete**: The user can assign an academic plan to a student and work with it.
- **Edit**: The user can assign an academic plan to a student and work with its information with the exception of deleting a Note or an Alert.
- **View**: The user can view but not change the academic plan assigned to a student and its information.
- **None**: The user is unable to view or work with the academic plan assigned to a student.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **None**

- District Health Professional: **None**

Student Academic Plan Notes permission

This permission controls the user's ability to work with the notes attached to a student's academic plan [see p.101].

Dependencies:

- The setting for the *Student Academic Plan permission* [p. 621] takes precedence over this permission. For this permission to be effective, its setting must be the same or less restrictive than that of the *Student Academic Plan permission* [p. 621].

Settings:

- **Delete**: The user can add, edit, and delete notes attached to student's academic plan.
- **Edit**: The user can add and edit notes attached to student's academic plan.
- **View**: The user can view but not change notes attached to student's academic plan.
- **None**: The user is unable to view or work with notes attached to student's academic plan.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **None**
- District Health Professional: **None**

Admin permissions

These permissions include:

- *Copy School Information permission* [p. 622]
- *Register Schools permission* [p. 623]

Copy School Information permission

This permission controls the user's ability to copy a school's setup from one school to another [see *District setup* p.251].

To copy a school's setup:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Schools**, click **Copy SMS School Info**. The Copy School Info page appears.
3 For **Copy from School**, select a district school.
4 For **To school**, select a district school.

5 Click **Copy**.

Dependencies: None

Settings:

- **Yes**: The user can copy a school's setup to another school.
- **No**: The user is unable to copy a school's setup.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Register Schools permission

This permission is no longer applicable.

Advanced Reporting permissions

These permissions control access to Advanced Reporting Toolkit, an optional extension of PowerSchool SMS. The Advanced Reporting Toolkit is high-performance, configurable, and versatile data extraction and transformation application that enables a school district to assemble and present student information as often as necessary to meet state reporting requirements and for other reporting purposes.

The relevant permissions include:

- *Data Source Builder permission* [p. 623]
- *Generate Reports - Manage Snapshots permission* [p. 624]
- *Generate Reports - Submission permission* [p. 624]
- *Reporting Setup permission* [p. 625]

To work with Advanced Reporting:
In the **Admin** menu, click **Advanced Reporting**.

- For detailed information, refer to the *Advanced Reporting Toolkit Reference Manual*.

Data Source Builder permission

This permission controls the user's ability to configure data sources for use in Advanced Reporting Toolkit report specifications.

Dependencies: None

Settings:

- **Delete**: The user can view, work with, and delete data sources.
- **Edit**: The user can work with data sources.
- **View**: The user can view but not configure data sources.

- **None**: The user is unable to view or work with data sources.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **None**
- School Counselor: **None**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Generate Reports - Manage Snapshots permission

This permission controls the user's ability to generate report snapshots in Advanced Reporting Toolkit.

Dependencies: None

Settings:
- **Delete**: The user can generate and delete snapshots.
- **Edit**: The user can generate and view snapshots.
- **View**: Same as Edit.
- **None**: The user is unable to generate or view report snapshots.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **None**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Generate Reports - Submission permission

This permission controls the user's ability to submit the results of a generated report (that is, a submission file) in the Advanced Reporting Toolkit.

Dependencies: None

Settings:
- **Yes**: The user can submit a submission file.
- **No**: The user is unable to submit a submission file.

Default settings by base role [p. 246]:
- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**

- School Health Professional: **No**
- District Health Professional: **No**

Reporting Setup permission

This permission controls the user's ability to set up report specifications in Advanced Reporting Toolkit.

To work with Advanced Reporting:
   In the **Admin** menu, click **Advanced Reporting**.

Dependencies: None

Settings:

- **Delete**: The user can view, work with, and delete report specifications.
- **Edit**: Same as Delete.
- **View**: The user can view and use but not change report specifications.
- **None**: The user is unable to view or work with report specifications.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Attendance permissions

Permissions in this category pertain to the taking of attendance [p. 76]. For permissions pertaining to attendance-taking methods and setup, refer to *School Setup permissions* [p. 702]. Attendance permissions include:

- *Change Reason for Submitted Attendance permission* [p. 626]
- *Daily Attendance permission* [p. 627]
- *Daily Attendance Override permission* [p. 628]
- *Enter Current Attendance permission* [p. 629]
- *Enter Future Attendance permission* [p. 629]
- *Mass Attendance permission* [p. 630]
- *Modify Attendance Entered by Office permission* [p. 630]
- *Modify Past Attendance permission* [p. 631]
- *Modify Submitted Attendance permission* [p. 631]
- *Override Student Behavior Attendance permission* [p. 632]

Change Reason for Submitted Attendance permission

This permission controls the user's requirement to enter a reason for any change to a submitted attendance code. The administrator can force or enable the user to enter a change reason. The user can select the change reason from a list that PowerSchool SMS derives from the Attendance Change Reason setup list.

PowerSchool SMS-calculated updates to attendance codes, such as Student Behavior Suspension, do not require and will not be assigned a change reason. PowerSchool SMS logs change reasons entered [p. 163].

To require a role to enter a reason for a change to a submitted attendance code: [DA][1]

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Users and Security**, click <u>Base Roles</u>. The Base Roles page appears.
3 Under **Base Role**, click the role's name. The Edit Base Role page appears.
4 Expand the Attendance category.
5 For the **Change Reason for Submitted Attendance** permission, change its **Access** to "Yes".

To enable district users to enter a reason for a change to a submitted attendance code: [DA][2]

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Preferences**, click <u>General</u>. The General Preferences popup page appears.
3 Under **Attendance Change Reason**, select **Enable change reason on attendance pages**
    - When this field is selected, PowerSchool SMS displays the **Change Reason** field on the following pages: Mass Attendance, Class Attendance, Student Attendance, Homeroom Attendance, Office Attendance, Supplementary Attendance, Attendance by Period.
4 Select one of the following options:
    - **Change reason not required**: PowerSchool SMS displays a list of change reasons but the user is not required to select one.
    - **Change reason required for override to any submitted attendance codes**: PowerSchool SMS displays a list of change reasons and the user is required to select one. (If the user's role's permission set to No the user is not required to select a reason but the user has the option of entering a reason.) If attendance has not been submitted, the user can only view potential change reasons.
    - **Change reason required for override to submitted calculated daily attendance codes only**: If the user makes a change to the

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[1]You can do this if your role is District Administrator.
[2]You can do this if your role is District Administrator.

calculated daily code, PowerSchool SMS displays a list of change reasons and the user is required to select one.

5 Click Save.

Dependencies:

- The effect of this permission depends on General Preferences settings.
- This permission applies to schools that take once-daily attendance [p. 181].
- This permission applies to schools that take attendance by class [p. 181].
- This permission applies to a role with a school-level scope [p. 240]. (A role with district-level scope is unable to view the attendance-taking pages.)

Settings:

- **Yes**: The user is required to enter a reason for a change to attendance submitted for a student. The user can select a **Change Reason** on various attendance-related pages in the system. The specific effect depends on the General Preferences setting **Enable change reason on attendance pages** [p. 625].
- **No**: The user is not required to enter a reason for a change to submitted attendance. The**Change Reason** field is not visible.

Default settings by base role [p. 246]:

- District Administrator: **No**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Daily Attendance permission

This permission controls the user's ability to assign a daily attendance code to a student [p. 76].

Dependencies:

- This permission applies to schools that take once-daily attendance [p. 181].
- This permission applies to schools that take attendance by class [p. 181].
- This permission applies to a role with a school-level scope [p. 240]. (A role with district-level scope is unable to view the attendance-taking pages.)
- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

- For the user to record attendance for the current day, the setting for the *Enter Current Attendance permission* [p. 629] must be Yes.
- For the user to record attendance for a future day, the setting for the *Enter Future Attendance permission* [p. 629] must be Yes.
- For the user to record attendance for a past day, the setting for the *Modify Past Attendance permission* [p. 631] must be Yes.

Settings:

- **Yes**: The user can record attendance for a student.
- **No**: The user is unable to record attendance for a student. On the Student Demographics page [p. 55], PowerSchool SMS does not display the Attendance link. On the My Classes page [p. 16], PowerSchool SMS does not display the attendance icon.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **Yes**
- Teacher: **Yes**
- School Health Professional: **No**
- District Health Professional: **No**

Daily Attendance Override permission

This permission controls the user's ability to make PowerSchool SMS recalculate daily attendance codes for an individual student for one or more days in the past as well as the current day [p. 159].

Dependencies:

- This permission applies to schools that take attendance by class [p. 181].
- This permission applies to a role with a school-level scope [p. 240]. (A role with district-level scope is unable to view the attendance-taking pages.)
- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Yes**: The user can recalculate a student's daily attendance code.
- **No**: The user is unable to recalculate a student's daily attendance code.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**

- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Enter Current Attendance permission

This permission controls the user's ability to assign an attendance code to one or more students for the current date [p. 76].

Dependencies:

- This permission applies to a role with a school-level scope [p. 240]. (A role with district-level scope is unable to view the attendance-taking pages.)
- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Yes**: The user can assign an attendance code to one or more students for the current date.
- **No**: The user is unable to assign an attendance code to one or more students for the current date.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **Yes**
- Teacher: **Yes**
- School Health Professional: **No**
- District Health Professional: **No**

Enter Future Attendance permission

This permission controls the user's ability to assign attendance code to one or more students for a future date [p. 76].

Dependencies:

- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Yes**: The user can assign an attendance code to one or more students for a future date.
- **No**: The user is unable to assign an attendance code to one or more students for a future date.

Default settings by base role [p. 246]:

- District Administrator: **Yes**

- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **Yes**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Mass Attendance permission

This permission controls the user's ability to assign attendance to more than one student at a time [p. 76].

Dependencies:
- This permission applies to a role with a school-level scope [p. 240].
- This permission overrides the other attendance permissions [p. 625]. For example, a user for whom the setting for the *Modify Submitted Attendance permission* [p. 631] is No and the *Mass Attendance permission* [p. 630] is Yes can mass assign attendance even where the attendance being modified has already been recorded.
- This permission does not enable a user with the base role of Teacher [p. 246] to work with students not assigned to him or her.

Settings:
- **Yes**: The user can assign attendance to more than one student at a time.
- **No**: The user is unable to assign attendance to more than one student at a time.

Default settings by base role [p. 246]:
- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Modify Attendance Entered by Office permission

This permission controls the user's ability to change a student's attendance code where that code has been recorded [p. 76].

Dependencies:
- This permission applies to a role with a school-level scope [p. 240]. (A role with district-level scope is unable to view the attendance-taking pages.)
- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Yes**: The user can change a student's previously recorded attendance code.
- **No**: The user is unable to change a student's previously recorded attendance code.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **Yes**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Modify Past Attendance permission

This permission controls the user's ability to change the attendance codes assigned to a student in the past [p. 76].

Dependencies:

- This permission applies to a role with a school-level scope [p. 240]. (A role with district-level scope is unable to view the attendance-taking pages.)
- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Yes**: The user can change the attendance codes assigned to a student in the past.
- **No**: The user is unable to change the attendance codes assigned to a student in the past.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **Yes**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Modify Submitted Attendance permission

This permission controls the user's ability to change any "Present" attendance codes assigned to a student in the past, for the current date, or for a future date [p. 76]. The user is unable to change "Absent" or "Tardy" codes.

Dependencies:

- This permission applies to a role with a school-level scope [p. 240].
  (A role with district-level scope is unable to view the attendance-taking pages.)
- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Yes**: The user can change any "Present" attendance codes assigned to a student.
- **No**: The user is unable to change any "Present" attendance codes assigned to a student.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **Yes**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Override Student Behavior Attendance permission

This permission controls the user's ability to change an attendance code assigned to a student via a student behavior action step see *Assigning follow-up behavior action* [p. 97].

Dependencies:

- This permission applies to a role with a school-level scope [p. 240].
  (A role with district-level scope is unable to view the attendance-taking pages.)
- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.
- This permission is affected by the field **Student Behavior Action's Attendance Override** associated with an behavior action step see *Student behavior setup* [p. 265]. When this field's setting is "No override allowed", this permission's setting has no effect. When this field's setting is "User can override with permission", this permission's setting takes effect.

Settings:

- **Yes**: The user can change an attendance code assigned to a student via a student behavior action step
- **No**: The user is unable to change an attendance code assigned to a student via a student behavior action step.

Default settings by base role [p. 246]:

- District Administrator: **No**

- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **Yes**
- District Health Professional: **No**

District permissions

Permissions in this category pertain to district setup [p. 251]. These include:

- *Academic Plan Setup permission* [p. 634]
- *Address Exceptions permission* [p. 634]
- *Address Exceptions - chg addr override permission* [p. 635]
- *Assign Courses to Schools permission* [p. 636]
- *Attendance Calculations permission* [p. 637]
- *Attendance Rules for Credit Calculations (District) permission* [p. 637]
- *CDM Status Codes permission* [p. 638]
- *PowerSchool SMS Course Subject Areas permission* [p. 639]
- *Course Catalog permission* [p. 639]
- *Create Customization Package permission* [p. 640]
- *Custom Setup Lists permission* [p. 641]
- *Custom Student Data permission* [p. 642]
- *Custom User Interface permission* [p. 643]
- *Customization Builder permission* [p. 643]
- *Define Constraints - District permission* [p. 644]
- *Define District Calendar permission* [p. 645]
- *District Profile permission* [p. 646]
- *District Standardized Tests permission* [p. 646]
- *Edit Address Ranges permission* [p. 647]
- *General Preferences permission* [p. 645]
- *Geocode Maps permission* [p. 648]
- *Grade Levels permission* [p. 648]
- *Health Examination Rule permission* [p. 649]
- *Immunization permission* [p. 650]
- *Install Customization Package permission* [p. 650]
- *Manage Schema Properties permission* [p. 651]
- *Manage UI Properties permission* [p. 651]
- *Mid Year Transfers Preferences permission* [p. 652]
- *District permissions* [p. 633]
- *Projected School Maps permission* [p. 653]
- *Promote and Graduate Pending Students permission* [p. 654]
- *Provisional Enrollments permission* [p. 654]
- *Registration and Enrollment Preferences permission* [p. 655]
- *Transportation Setup permission* [p. 655]

Academic Plan Setup permission

This permission controls the user's ability to define academic plans for use in the district [p. 269].

Dependencies: None

Settings:
- **Delete**: The user can add, edit, or delete an academic plan for the district.
- **Edit**: The user can add or edit an academic plan for the district.
- **View**: The user view but not change an academic plan.
- **None**: The user is unable to view or work with a district's academic plans.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **None**
- District Health Professional: **None**

Address Exceptions permission

This permission controls the user's ability to approve or reject an address exception as part of the address validation process. On the Address Exceptions page, PowerSchool SMS displays a list of students whose address is out of a particular school's zone according to the Geocode Map [p. 153].

To work with address exceptions:
1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click **Address Exceptions**. The Address Exceptions page appears.

Dependencies:
- This permission applies only to a system that employs address validation.

Settings:
- **View**: The user can approve or reject an address exception and set an address exception's status to pending. The user cannot add or delete an address exception.
- **Edit**: Same as View.
- **Delete**: The user can approve, reject, add, or delete an address exception and set an address exception's status to pending.

- **None**: The user does not have access to address exceptions—PowerSchool SMS does not display a link to the Address Exceptions page nor page itself.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **None**
- School Counselor: **None**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Address Exceptions - chg addr override permission

When a student's address is out-of-zone, this permission controls the message PowerSchool SMS displays in the Address Validation Exception override dialog and the dialog options available to the user.

To view the Address Validation Exception dialog message:
1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.
2 Click **Address/Phone**.
3 Under **Address**, add or update the address.
4 Click **Save**. The Address Validation Exception dialog appears.

Dependencies:
- This permission applies only to a system that employs address validation.

Settings:
- **Yes**: In the Address Validation dialog PowerSchool SMS displays the following:

  "Based on the student's physical address and grade level, the student will be out of zone for one or more of his or her enrolled school(s)".

  In the dialog, PowerSchool SMS displays two options: "Create address exception record(s)" and "Do not create address exception record(s)".
- **No**: In the Address Validation dialog PowerSchool SMS displays the following:

  "Based on the student's physical address and grade level, the student will be out of zone for one or more of his or her enrolled school(s). Address Exemption records will be created."

  In the dialog, the user must select an exception reason and click **OK** to have PowerSchool SMS create an address exception.

Default settings by base role [p. 246]:
- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**

- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Assign Courses to Schools permission

This permission controls the user's ability to assign subjects to schools that use elementary scheduling and courses to schools that use secondary scheduling see *Scheduling* [p. 280].

To work with subjects:
1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click <u>Course Catalog</u>. The Course Catalog Home page appears.
3 Click <u>Subject Framework</u>. The Subject Framework page appears.

To work with courses:
1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click <u>Course Catalog</u>. The Course Catalog Home page appears.
3 Click <u>Courses</u>. The Courses page appears.

Dependencies:
- For the user to view the Course Catalog page, that user's Course Catalog permission [p. 639] setting must be View, Edit, or Delete.
- For the user to assign subjects to schools using elementary scheduling, that user's Course Catalog permission [p. 639] setting must be Edit or Delete.

Settings:
- **Yes**: The user can assign courses to schools. This means that on the Course List page, PowerSchool SMS includes Assign to Schools in the Actions menu. On the Course Details page, when the user clicks School Assignment in the control bar, PowerSchool SMS displays the Assign to Schools list.
  The user can assign subjects to schools. This means that on the Subject Framework page, PowerSchool SMS includes Assign to Schools in the Actions menu.
- **No**: The user cannot assign subjects and courses to schools.This means that on the Course List page, PowerSchool SMS does not include Assign to Schools in the Actions menu. On the Course Details page, when the user clicks School Assignment in the control bar, PowerSchool SMS does not display the Assign to Schools list.
  The user cannot assign subjects to schools. This means that on the Subject Framework page, PowerSchool SMS does not include Assign to Schools in the Actions menu.

Default settings by base role [p. 246]:
- District Administrator: **Yes**

- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Attendance Calculations permission

This permission controls the user's ability to schedule daily attendance minutes and daily attendance code calculations as well as to schedule a job to initialize the day and populate the database with default attendance values see *Attendance setup* [p. 181].

Dependencies: None

Settings:

- **Yes**: The user has access to the Schedule Attendance Calculation page. This means that on the District Setup page PowerSchool SMS displays the Schedule Attendance Calculations link.
- **No**: The user does not have access to the Schedule Attendance Calculation page. This means that on the District Setup page PowerSchool SMS does not display the Schedule Attendance Calculations link.

Default settings by base role [p. 246]:
- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Attendance Rules for Credit Calculations (District) permission

This permission controls the user's ability to define how a student's attendance in a class affects the number of credits for which they are eligible see *Attendance setup* [p. 181].

To work with attendance minutes calculations:
1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Manage Attendance**, click <u>Schedule Attendance Calculations</u>. The Schedule Attendance Calculation page appears.

Dependencies: None

Settings:

- **View**: The user can view attendance rules for credit calculations. On the Attendance Rules for Credit Calculations page, all fields are read-only.
- **Edit**: The user has access to attendance rules for credit calculations. On the Attendance Rules for Credit Calculations page, the user can view and change all fields.
- **Delete**: Same as Edit.
- **None**: The user does not have access to attendance rules for credit calculations. On the District Setup page, PowerSchool SMS does not display the Attendance Rules for Credit Calculations link.

Default settings by base role [p. 246]:
- District Administrator: **Edit**
- School Administrator: **None**
- School Counselor: **None**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

CDM Status Codes permission

This permission controls the user's ability to create custom status code fields [p. 472].

Dependencies:
- If this permission's setting is None, and the four related permissions—CDM Status Codes [p. 638], Custom Setup Lists [p. 641], Custom Student Data [p. 642], and Custom User Interface [p. 643]—are also set to None, PowerSchool SMS does not display the Custom Data Manager (Student Data) link is on the District Setup page.

Settings:
- **Delete**: The user has access to custom status code fields. On the Status Code Fields page in Custom Data Manager (CDM), the user can add, edit, or delete custom status code fields.
- **Edit**: The user can add or edit, but not delete, custom status code fields on the Status Code Fields page.
- **View**: The user can view but not change custom status code fields on the Status Code Fields page.
- **None**: The user does not have access to custom status code fields. On the Custom Date Manager page, PowerSchool SMS does not display a link to the Status Code Fields page.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**

- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

PowerSchool SMS Course Subject Areas permission

This permission controls the user's access to the Course Catalog's subject areas.

To work with the Course Catalog's subject areas:
1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click **Course Catalog**. The Course Catalog Home page appears.
3 Click **PowerSchool SMS Subject Area**. The Subject Area page appears.

Dependencies:

- The following setup list permissions are also relevant to controlling the user's access to the Course Catalog:
  "PowerSchool SMS Course Type" [*Table 92*, p.745]
  "PowerSchool SMS Department" [*Table 92*, p.745]
  "PowerSchool SMS Room Type" [*Table 93*, p.746].

Settings

- **Delete**: The user can edit, add, or delete subject areas in the Course Catalog.
- **Edit**: The user can add and edit subject areas but not delete them.
- **View**: The user can view but not change subject areas.
- **None**: The user does not have access to the Course Catalog's subject areas. On the Course Catalog Home page, PowerSchool SMS displays a disabled **Chancery SMS Subject Areas** link.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **None**
- District Health Professional: **None**

Course Catalog permission

This permission controls the user's access to the Course Catalog's subjects and courses.

To work with the Course Catalog's subjects:
1 In the **Admin** menu, click **District Setup**. The District Setup page appears.

2 Under **District**, click <u>Course Catalog</u>. The Course Catalog Home page appears.

3 Click <u>Subject Framework</u>. The Subject Framework page appears.

To work with the Course Catalog's courses:

1 In the **Admin** menu, under **Admin**, click **District Setup**. The District Setup page appears.

2 Under **District**, click <u>Course Catalog</u>. The Course Catalog Home page appears.

3 Click <u>Courses</u>. The Course List page appears.

Dependencies:

- This permission does not affect the school-level Course List or Subject Framework pages that are available from the School Setup page [p. 169].
- To control the user's ability to assign subjects and courses to schools, see the *Assign Courses to Schools permission* [p. 636].

Settings:

- **Delete**: The user can edit, add, or delete subjects and courses.
- **Edit**: The user can edit or add courses and subjects. The user cannot delete courses or subjects.
- **View**: The user can view but not change subjects and courses.
- **None**: The user does not have access to the Course Catalog. On the District Setup page, PowerSchool SMS does not display the <u>Course Catalog</u> link.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Create Customization Package permission

This permission controls the user's ability to create customization packages [p. 523].

Dependencies:

- The setting for the Customization Builder permission [p. 643] must be Yes.

Settings:

- **Yes**: The user can create customization packages.

- **No**: The user cannot create custom packages. On the District Setup page, PowerSchool SMS does not display the **Create Customization Package** link.

Default settings by base role [p. 246]:
- District Administrator: **Yes**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Custom Setup Lists permission

This permission controls the user's ability to create custom setup lists [p. 478] [p. 478].

Dependencies:
- The setting for the following permissions must be Edit or Delete: *CDM Status Codes permission* [p. 638], *Custom Student Data permission* [p. 642], *Custom User Interface permission* [p. 643].
- If the setting for this permission and for its related permissions—*CDM Status Codes permission* [p. 638], *Custom Student Data permission* [p. 642], *Custom User Interface permission* [p. 643]—is None, then on the District Setup page, PowerSchool SMS does not display the **Manage Setup Lists** link.

Settings:
- **Delete**: The user can add, edit, or delete custom setup lists.
- **Edit**: The user can add or edit custom setup lists. The user cannot delete custom setup lists.
- **View**: The user can view but not change custom setup lists.
- **None**: The user is unable to work with custom setup lists. On the Custom Data Manager page, PowerSchool SMS does not display the **Setup Lists...** link.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **View**
- District Health Professional: **None**

Custom Student Data permission

This permission controls the user's ability to create tables that store custom data. For information on Custom Data Management features, refer to the *Chancery SMS 6.7.1 cTools Guide*.

To work with tables for custom data:

1 In the **Admin** menu, under **Admin**, click **District Setup**. The District Setup page appears.
2 Under **cTools**, click **Manage Setup Lists.** The Custom Setup Lists popup page appears.
3 Under **Step 2: Define tables and fields for custom data**, click one of the following:
   - **Basic...**
   - **Multi-Select list...**
   - **Repeating Group...**
   - **Chronological...**

Dependencies:

- If the setting for this permission and its related permissions—*CDM Status Codes permission* [p. 638], *Custom Student Data permission* [p. 642], *Custom User Interface permission* [p. 643], and *Custom Setup Lists permission* [p. 641]—is None, then on the District Setup page, PowerSchool SMS does not display the **Custom Data Management (Student Data)** link.

Settings

- **Delete**: The user can add, edit, or delete custom basic tables, multi-select lists, repeating groups, or chronological groups.
- **Edit**: The user can add or edit custom basic tables, multi-select lists, repeating groups, or chronological groups. The user cannot delete any of these.
- **View**: The user can view but not change custom basic tables, multi-select lists, repeating groups, and chronological groups.
- **None**: The user cannot work with custom basic tables, multi-select lists, repeating groups, or chronological groups. On the Custom Data Manager page, PowerSchool SMS does not display the following links: Basic, Multi-Select list, Repeating Group, and Chronological.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Custom User Interface permission

This permission controls the user's ability to create pages using Custom Data Management features. For information on Custom Data Management features, refer to the *Chancery SMS 6.7.1 cTools Guide*.

To work with custom pages:

1   In the **Admin** menu, under **Admin**, click **District Setup**. The District Setup page appears.
2   Under **cTools**, click **Custom Data Management (Student Data)**. The Custom Data Manager page appears.
3   Under **Step 3** or **Step 4**, click one of the following:
    - **Status Code Layout...**
    - **Forms...**
    - **Page Sets...**
    - **Control Bar...**
    - **Wizard Bar...**

Dependencies:

- If the setting for this permission and its related permissions—*CDM Status Codes permission* [p. 638], and *Custom Student Data permission* [p. 642], and *Custom Setup Lists permission* [p. 641]—is None, then on the District Setup page, PowerSchool SMS does not display the **Custom Data Management (Student Data)** link.

Settings:

- **Delete**: The user can add, edit, copy, or delete custom status code layouts, forms, page sets, the control bar, and the wizard bar.
- **Edit**: The user can add, edit, or copy custom status code layouts, forms, page sets, the control bar, and the wizard bar. The user cannot delete any of these.
- **View**: The user can view but not change custom status code layouts, forms, page sets, the control bar, and the wizard bar.
- **None**: The user cannot work with custom status code layouts, forms, page sets, the control bar, and the wizard bar.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Customization Builder permission

This permission controls the user's ability to use cTools [p. 472], that is, to work with custom schemas and pages and to connect dynamic pairs of setup lists.

Dependencies: None

Settings

- **Yes**: The user has full access to cTools. On the District Setup page, PowerSchool SMS displays the following links: Manage Schemas, Manage Pages, Create Customization Package, Install Customization Package, and Setup List Pair Management.
- **No**: The user does not have access to cTools. On the District Setup page, PowerSchool SMS does not display any of the relevant links.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Define Constraints - District permission

This permission controls the user's ability to view, add, edit and delete Course Catalog constraints [p. 310].

To work with Course Catalog constraints:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click **Course Catalog**. The Course Catalog Home page appears.
3 Under **Step 2**, click **Constraints (Elementary)**.
   - Or under **Step 3**, click **Constraints (Secondary)**.

Dependencies: None

Settings:

- **Delete**: The user can add, edit, and delete constraints.
- **Edit**: The user can add and edit but not delete constraints.
- **View**: The user can view but not change constraints.
- **None**: The user does not have access to constraints. On the Course Catalog Home page, PowerSchool SMS disables any links to constraints-related pages.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Define District Calendar permission

This permission controls the user's ability to work with district calendars [p. 252] and switch between them [p. 254]. The effect of this permission depended on the user's base role [p. 246]. Note: This permission does not control the user's ability to register or enroll a student in the Planning Calendar [p. 255].

Dependencies: None

Settings

- **Yes**: The user can work with district calendars (which calendars depends on the user's base role). A user with the District Administrator base role can add or edit district calendars and switch between them. A user with any other base role can view but not change district calendars or switch between calendars.
- **No**: The user cannot view district calendars or switch between them. For the user with a District Administrator base role, on the District Setup page, PowerSchool SMS does not display the District Calendars link (for a School Administrator base role, access to the Switch Calendar menu item is controlled by the Define School Calendar permission [p. 717]). On the home page's [p. 15] Actions menu, PowerSchool SMS does not display the "Switch Calendar" choice.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

General Preferences permission

This permission controls the user's ability to work with district-wide settings such as enrollment and the student numbering scheme see *District setup* [p. 251].

To work with district-wide settings:
1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click **General...**. The General Preferences page appears.

Dependencies: None

Settings:

- **Edit**: The user can work with all district-wide preferences.

- **View**: The user can view but not work with district-wide preferences.
- **None**: The user does not have access to district-wide preferences. On the District Setup page, PowerSchool SMS does not display the **General...** link.

Default settings by base role [p. 246]:
- District Administrator: **Edit**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

District Profile permission

This permission controls the user's ability to work with district information such as its name, addresses, and key staff see *District-specific information* [p. 251].

Dependencies: None

Settings:
- **Edit**: The user can work with district profile information.
- **View:** The user can view but not work with district profile information.
- **None**: The user does not have access to district profile information. On the District Setup page, PowerSchool SMS does not the District Profile link.

Default settings by base role [p. 246]:
- District Administrator: **Edit**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

District Standardized Tests permission

This permission controls the user's ability to define the standardized tests that are recorded district-wide see *District setup* [p. 251]. **Note**: This permission has no affect on access to test management, which is controlled by *Test Management permissions* [p. 799].

To work with standardized tests:
1 In the **Admin** menu, click **District Setup**. The District Setup page appears.

2 Under **Legacy**, click <u>Tests</u>.

Dependencies:

- This permission applies only when legacy tests functionality is enabled on the General Preferences page see *District setup* [p. 251].

Settings:

- **Delete**: The user can add, edit, or delete standardized tests.
- **Edit**: The user can add or edit, but not delete, standardized tests.
- **View**: The user can view but not work with standardized tests.
- **None**: The user does not have access to standardized tests. On the District Setup page, PowerSchool SMS does not display the Tests link.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Edit Address Ranges permission

This permission controls the user's ability to work with the address ranges used in address validation.

To work with address ranges:
1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click <u>Address Validation Setup</u>. The Address Validation Setup page appears.
3 Under **Step 4**, click <u>Address Ranges</u>.

Dependencies:

- This permission applies only on a system that employs address validation.

Settings:

- **Yes**: The user can work with address ranges.
- **No**: The user does not have access to address ranges. On the Address Validation page, PowerSchool SMS disables the Address Ranges link.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**

- District Health Professional: **No**

Geocode Maps permission

This permission controls the user's ability to view and work with the Geocode Map on which the user can assign geocodes to the entry grade(s) at each school [p. 153].

Dependencies:

- This permission applies only on a system where the Year-End Transfer Method is set to Geocode Map [p. 153]. (Where the Year-End Transfer Method is set to Projected School Map [p. 151], refer to the *Projected School Maps permission* [p. 653].)
- If the setting for this permission and all other permissions pertaining to year-end processing—*District permissions* [p. 633], *Projected School Maps permission* [p. 653], and *Promote and Graduate Pending Students permission* [p. 654]—is None, PowerSchool SMS does not display the Year-End Processing link on the District Setup page.

Settings:

- **Edit**: The user can work with the geocode map.
- **View**: The user can view but not change the Geocode map. Specifically, the user can view the number of geocodes assigned to a school entry grade(s) but not the specific geocodes.
- **None**: Same as View.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **View**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Grade Levels permission

This permission controls the user's ability to describe the 20 grade levels available.

To work with grade levels:
1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click **Grade Levels**. The Grade Levels page appears.

Dependencies: None

Settings:

- **Edit**: The user can view and change each grade level's description, state code, and state name. The user cannot change a grade level's short code or delete it.
- **View**: The user can view but not change each grade level's information
- **None**: The user cannot view the grade levels. On the District Setup page, PowerSchool SMS does not display the Grade Levels link.

Default settings by base role [p. 246]:
- District Administrator: **Edit**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Health Examination Rule permission

This permission controls the user's ability to define health examination rules.

To work with health examination rules:
1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Manage Health**, click <u>Examination Setup</u>. The Examination Rules page appears.

Dependencies:
- If the setting of this permission and the Provisional Enrollments permission [p. 654] are both None, the user cannot view the health examination types—PowerSchool SMS does not display the Examination Setup link on the District Setup page.

Settings:
- **Delete**: The user can add, edit, and delete health examination rules.
- **Edit**: The user can add or change but not delete health examination rules.
- **View**: Same as None.
- **None**: The user can view but not change health examination types.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **View**
- District Health Professional: **Delete**

Immunization permission

This permission controls the user's ability to define scheduled immunization requirements.

To work with scheduled immunization requirements:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Manage Health**, click <u>Immunization Setup</u>. The Immunization Setup page appears.

Dependencies:

- If the setting of this permission and the Provisional Enrollments permission [p. 654] are both None, the user cannot view the immunization types—PowerSchool SMS does not display the Immunization Setup link on the District Setup page.

Settings:

- **Delete**: The user can add, edit, and delete immunization types.
- **Edit**: The user can add or edit but not delete immunization types.
- **View**: The user can view but not change immunization types.
- **None**: Same as View.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **View**
- District Health Professional: **Delete**

Install Customization Package permission

This permission controls the user's ability to install customization packages [p. 523].

Dependencies:

- The setting for the *Customization Builder permission* [p. 643] must be Yes.

Settings:

- **Yes**: The user can install customization packages.
- **No**: The user cannot install customization packages. On the District Setup page, PowerSchool SMS does not display the Install Customization Package link.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **No**

- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Manage Schema Properties permission

This permission controls the user's ability to add, edit, and delete custom extensions and child schemas [p. 489].

Dependencies:

- The setting for the *Customization Builder permission* [p. 643] must be Yes.

Settings:

- **Yes**: The user can add, edit, and delete custom schemas.
- **No**: The user does not have access to custom schemas. On the District Setup page, PowerSchool SMS does not display the Manage Schemas link.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Manage UI Properties permission

This permission controls the user's ability to customize the system's interface by adding, editing, and deleting custom pages, panels, and fields [p. 505].

Dependencies:

- The setting for the *Customization Builder permission* [p. 643] must be Yes.

Settings:

- **Yes**: The user can add, edit, and delete custom pages.
- **No**: The user is unable to work with custom pages. On the District Setup page, PowerSchool SMS does not display the Manage Pages link.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**

- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Mid Year Transfers Preferences permission

This permission controls the user's ability to define settings for mid-year transfers, including the status codes used, how long logs are kept, and the transfer of student data from a student's former school to the new school.

To work with mid-year transfer settings:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Mid-Year Transfer**, click <u>**Mid-Year Transfer…**</u>. The Mid-Year Transfer Preferences popup page appears.

Dependencies: None

Settings:

- **Edit**: The user can change but not delete mid-year transfer preferences.
- **View**: The user can view but not change mid-year transfer preferences.
- **None**: The user does not have access to mid-year transfer preferences. On the District Setup page, PowerSchool SMS does not display the Mid-Year Transfer link.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Perform Year-End Processing permission

This permission controls the user's ability to run year-end processing [p. 450].

Dependencies:

- If the setting for this permission and all other permissions pertaining to year-end processing—*Geocode Maps permission* [p. 648], *Projected School Maps permission* [p. 653], and *Promote and Graduate Pending Students permission* [p. 654]—is None, PowerSchool SMS does not display the Year-End Processing link on the District Setup page.

Settings:

- **Yes**: The user can run year-end processing.

- **No**: The user does not have access to year-end processing.

Default settings by base role [p. 246]:
- District Administrator: **Yes**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Projected School Maps permission

This permission controls the user's ability to define a graduation grade and projected school for each of the district's schools [p. 151], information PowerSchool SMS uses when the user runs year-end processing [p. 450].

Dependencies:
- This permission applies only on a system where the Year-End Transfer Method is set to Projected School Map [p. 151]. (Where the Year-End Transfer Method is set to Geocode Map [p. 153], refer to the *Geocode Maps permission* [p. 648].)
- If the setting for this permission and all other permissions pertaining to year-end processing—*Geocode Maps permission* [p. 648], *District permissions* [p. 633], and *Promote and Graduate Pending Students permission* [p. 654]—is None, PowerSchool SMS does not display the Year-End Processing link on the District Setup page.

Settings:
- **Edit**: The user can define the graduation grade and projected school for schools.
- **View**: The user can view but not change each school's graduation grade and projected school.
- **None**: The user does not have access to graduation grade and projected school information. On the Year-End Processing page, PowerSchool SMS does not display the Projected Schools link.

Default settings by base role [p. 246]:
- District Administrator: **Edit**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Promote and Graduate Pending Students permission

This permission controls the school-level user's ability to adjust the promotion status of a particular student [p. 451] and the district-level user's ability to view the promotion and graduation status of a student at a district school [p. 100].

Dependencies:

- If the setting for this permission and all other permissions pertaining to year-end processing—*Geocode Maps permission* [p. 648], *District permissions* [p. 633], and *Projected School Maps permission* [p. 653]—is None, PowerSchool SMS does not display the Year-End Processing link on the District Setup page.

Settings:

- **Yes**: The school-level user can adjust the promotion status of a student. The district-level user can view but not change the promotion status of a district student.
- **No**: The user cannot view the promotion status of a student. On the Year-End Processing page, PowerSchool SMS does not display the Promote and Graduate Students link.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Provisional Enrollments permission

This permission controls the user's ability to define immunization and examination compliance rules that pertain to provisional enrollment. For information about setting up provisional enrollment, refer to the *Chancery SMS Health Tracking Guide*.

To work with immunization and examination rules pertaining to provisional enrollment:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Manage Health**, click **Preferences**. The Preferences page appears displaying two sections; Immunizations and Examinations.

Dependencies: None

Settings:

- **Delete**: The user can add, edit, and delete immunization and examination rules.
- **Edit**: Same as Delete.
- **View**: The user can view but not change immunization and examination rules.
- **None**: The user does not have access to immunization and examination rules. On the District Setup page, PowerSchool SMS does not display the Manage Health section.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **View**
- District Health Professional: **Delete**

Registration and Enrollment Preferences permission

This permission controls the user's ability to set preferences for registration and enrollment *[p. 267]*.

Dependencies: None

Settings:
- **Delete**: The user can add, edit, and delete registration and enrollment preferences.
- **Edit**: Same as Delete.
- **View**: The user can view but not change registration and enrollment preferences.
- **None**: The user does not have access to registration and enrollment preferences.

Default settings by base role [p. 246]:
- District Administrator: **Edit**
- School Administrator: **View**
- School Counselor: **None**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Transportation Setup permission

This permission controls the user's ability to apply transportation information to either a school or a program.

To work with transportation information:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click <u>Transportation School Settings</u>. The Transportation School Settings page appears.
  - Or click <u>Transportation Program Settings</u>. The Transportation Program Settings page appears.

Dependencies: None

Settings:

- **Edit**: The user can add or edit transportation information.
- **View**: The user can view but not change transportation information.
- **None**: The user does not have access to transportation information. On the District Setup page, PowerSchool SMS does not display the Transportation School Settings and Transportation Program Settings links.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Enrollment/Program Queues permissions

Permissions in this category pertain to student enrollment [p. 141]. These permissions include:

- *Appendices* [p. 533]
- *Calculate Eligibility permission* [p. 657]
- *Eligibility Summary permission* [p. 658]
- *Home Hospital Instructor Override permission* [p. 659]
- *Miles from School permission* [p. 660]
- *Program Profile - See Other Schools permission* [p. 660]
- *Program Queue - Applicants permission* [p. 661]
- *Program Queue - Manage permission* [p. 662]
- *Program Queue - Override Capacity permission* [p. 662]
- *Program Queue - Override Rank permission* [p. 663]
- *Program Queue - Override Status permission* [p. 664]
- *Program Queue - Ranking permission* [p. 664]

Apply Students to Other Locations permission

This permission control's a school-level user's ability to have a student apply for enrollment in a program [p. 88] at another district school. For further

information, refer to the 📕 *Program Management Guide*.

To have a student apply for a program at another district school:

1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.
2 In the control bar, click **Profile**. The Program Profile page appears.
3 From the **Actions** menu, select **Apply to Program**.

Or

1 Search for the student(s) [p. 37].
2 In the search results, select one or more students.
3 From the **Actions** menu, select **Apply to Program**.

Dependencies:

- For this permission to be effective, the setting for the *Program Queue - Applicants permission* [p. 661] must be Edit or Delete and the *Assign to Program permissions* [p. 687] must be Yes.
- For a user whose role's scope is at the school level [p. 240] to view the Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Yes**: The user can have a student apply to a program in any school in the district.
- **No**: The user can have a student apply to a program in the user's current school.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Calculate Eligibility permission

This permission controls the user's ability to calculate a student's eligibility for a program [p. 88] based on defined eligibility rules. For further information, refer to the *PowerSchool SMS Program Management Guide*.

To calculate a student's eligibility for a program:

1 In the **School** menu, click **Manage Programs**. The Program Search page appears.
2 Select the program.

3 From the Actions menu, select **Manage Queues and Applicants**. The Manage Queues page appears.

4 Under **Queues**, in the **# Applications** column, click a number. The Manage Applicants page appears.

5 From the **Actions** menu, select **Calculate Eligibility...**.

Dependencies:

- For this permission to be effective, the setting for the *Program Queue - Applicants permission* [p. 661] must be Edit or Delete and the *Manage Participants permission* [p. 690] must be Yes.

Settings:

- **Yes**: The user can calculate a student's eligibility for a school program.
- **No**: The user is unable to calculate a student's eligibility for a school program.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Eligibility Summary permission

This permission controls the user's ability to view a student's eligibility status for a program [p. 88]. For further information, refer to the *PowerSchool SMS Program Management Guide*.

To view a student's eligibility status for a program:

1 In the **School** menu, click **Manage Programs**. The Program Search page appears.

2 Select the program.

3 From the Actions menu, select **Manage Queues and Applicants**. The Manage Queues page appears.

4 Under **Queues**, in the **# Applications** column, click a number. The Manage Applicants page appears.

5 In the **Eligibility Status** column, click the link. The Eligibility Summary page appears.

Dependencies:

- For a user whose role's scope is at the school level [p. 240] to view the Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Yes**: The user can view a student's eligibility status for a program.

- **No**: The user is unable to view a student's eligibility status for a program.

Default settings by base role [p. 246]:
- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Home Hospital Instructor Override permission

This permission controls the user's ability to, when assigning an instructor to a student in a Home Hospital program at a school, override the district-defined number of students to whom a Home Hospital Instructor can provide services to at any given time.

To assign an instructor to a student in a Home Hospital program:

1 Locate and view the record [p. 37] of a student who is in a Home Hospital program. The Student Demographics page [p. 55] appears.
2 In the control bar, click **Program Profile**. The Program Profile page appears.
3 In the **Program** column, click the link. The Edit Program Details page appears.
4 In the **Actions** menu, select **Add Instructional Information**.

Dependencies: None

Settings:
- **Yes**: The user can assign a Home Hospital instructor to any number of students.
- **No**: The user can assign a Home Hospital instructor to the number of students specified by the district.

Default settings by base role [p. 246]:
- District Administrator: **No**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Miles from School permission

This permission controls the user's ability to set the maximum distance a student who has applied to a program can live from the location of that program. This Miles from School value can be used in eligibility rules. For further information, refer to the *PowerSchool SMS Program Management Guide*.

To set the distance a student can live from a program:

1   Locate and view the record [p. 37] of a student who is in a program. The Student Demographics page [p. 55] appears.
2   In the control bar, click **Program Profile**. The Program Profile page appears.
3   In the **Program** column, click the name of a program. The Program Details page appears.

Dependencies: None

Settings:

*   **Yes**: The user can set the value in the Miles from School field.
*   **No**: The user can view but not change the value in the Miles from School field.

Default settings by base role [p. 246]:

*   District Administrator: **No**
*   School Administrator: **No**
*   School Counselor: **No**
*   School Secretary: **No**
*   Teacher: **No**
*   School Health Professional: **No**
*   District Health Professional: **No**

Program Profile - See Other Schools permission

This permission controls the user's ability to have a student apply to a program at any school in the district. For further information, refer to the *PowerSchool SMS Program Management Guide*.

To have a student apply to a program in a district school:

1   Locate and view the student's record [p. 37]. The Student Demographics page [p. 55] appears.
2   In the control bar, click **Program Profile**. The Program Profile page appears.
3   Select a program.
4   From the **Actions** menu, select **Apply to Program....**

Dependencies:

*   For a user whose role's scope is at the school level [p. 240] to view the Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Yes**: The user can have a student apply to any program in any district school.
- **No**: The user can have a student apply to any program in the user's school.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Program Queue - Applicants permission

This permission controls the user's ability to manage program applicants, including processing program applications, assigning students to queues, ranking applicants, and placing students in programs. For further information, refer to the *PowerSchool SMS Program Management Guide*.

To manage program applicants:

1 In the **School** menu, click **Manage Programs**. The Program Search page appears.
2 Search for the program.
  - Or click **Display All Records**.
3 Select the program.
4 From the Actions menu, select **Manage Queues and Applicants**. The Manage Queues page appears.
5 Under **Queues**, in the **# Applications** column, click a number. The Manage Applicants page appears.

Dependencies: None

Settings:

- **Delete**: The user can manage program applicants, including adding, editing, and deleting information.
- **Edit**: Same as Delete.
- **View**: The user can view applicant information and can move or copy applicants, calculate and override rankings, and assign an applicant to a program.
- **None**: The user is unable to view or work with program applicants.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **None**

- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Program Queue - Manage permission

This permission controls the user's ability to create, edit, copy, and delete applicant queues, as well as define queue eligibility rules. For further information, refer to the *PowerSchool SMS Program Management Guide*.

To manage program applicant queues:

1   In the **School** menu, click **Manage Programs**. The Program Search page appears.
2   Search for the program.
    - Or click **Display All Records**.
3   Select the program.
4   From the Actions menu, select **Manage Queues and Applicants**. The Manage Queues page appears.

Dependencies: None

Settings:

- **Delete**: The user can add, edit, and delete program applicant queues.
- **Edit**: The user can add and edit program applicant queues.
- **View**: The user can edit program applicant queues.
- **None**: The user is unable to view or work with program applicant queues.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Program Queue - Override Capacity permission

This permission controls the user's ability to override a program applicant queue's capacity. For further information, refer to the *PowerSchool SMS Program Management Guide*.

To override the capacity of a program applicant queue:

1   In the **School** menu, click **Manage Programs**. The Program Search page appears.
2   Search for the program.
    - Or click **Display All Records**.
3   Select the program.

4 From the Actions menu, select **Manage Queues and Applicants**. The Manage Queues page appears.

Dependencies: None

Settings:

- **Yes**: The user can override the capacity of a program applicant queue.
- **No**: The user is unable to override the capacity of a program applicant queue.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Program Queue - Override Rank permission

This permission controls the user's ability to override a program applicant's rank in a queue. For further information, refer to the *PowerSchool SMS Program Management Guide*.

To override a program applicant's rank in a queue:

1 In the **School** menu, click **Manage Programs**. The Program Search page appears.
2 Search for the program.
  - Or click **Display All Records**.
3 Select the program.
4 From the Actions menu, select **Manage Queues and Applicants**. The Manage Queues page appears.
5 In the **# Applications** column, click the number of applicants. The Manage Applicants page appears.
6 Select an applicant.
7 From the **Actions** menu, select **Override Rank**.

Dependencies: None

Settings:

- **Delete**: The user can override a program applicant's rank in the queue.
- **Edit**: Same as Delete.
- **View**: The user is unable to override a program applicant's rank in the queue.
- **None**: Same as View.

Default settings by base role [p. 246]:

- District Administrator: **Delete**

- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Program Queue - Override Status permission

This permission controls the user's ability to override a program applicant's status in the queue of applicants; for example, "Waiting", or "Denied". For further information, refer to the *PowerSchool SMS Program Management Guide*.

To override a program applicant's status in a queue:

1 In the **School** menu, click **Manage Programs**. The Program Search page appears.
2 Search for the program.
  - Or click **Display All Records**.
3 Select the program.
4 From the Actions menu, select **Manage Queues and Applicants**. The Manage Queues page appears.
5 In the **# Applications** column, click the number of applicants. The Manage Applicants page appears.
6 Select an applicant whose **Queue status** is "Waiting" or "Denied".
7 From the **Actions** menu, select **Assign to Program....** A dialog appears.
8 Enter a reason for the override and click **OK**.

Dependencies: None

Settings:

- **Yes**: The user can override a program applicant's status in a queue.
- **No**: The user is unable to override a program applicant's status in a queue.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Program Queue - Ranking permission

This permission controls the user's ability to calculate a program applicant's rank in a queue. For further information, refer to the *PowerSchool SMS*

Program Management Guide.

To calculate a program applicant's rank in a queue:

1 In the **School** menu, click **Manage Programs**. The Program Search page appears.
2 Search for the program.
   - Or click **Display All Records**.
3 Select the program.
4 From the Actions menu, select **Manage Queues and Applicants**. The Manage Queues page appears.
5 In the **# Applications** column, click the number of applicants. The Manage Applicants page appears.
6 Select an applicant.
7 From the **Actions** menu, select **Calculate Rank...**. The Calculate Ranks popup page appears.

Dependencies: None

Settings:
- **Delete**: The user can calculate a program applicant's rank in the queue.
- **Edit**: Same as Delete.
- **View**: The user is unable to calculate a program applicant's rank in the queue.
- **None**: Same as View.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Export permissions

Permissions in this category pertain to exporting data from a system. These permissions include:
- *Create Custom Exports permission* [p. 665]
- *Output Exports to File permission* [p. 666]
- *Schedule Exports permission* [p. 667]
- *Schedule Health Office/SETS Export permission* [p. 667]

Create Custom Exports permission

This permission controls the user's ability to edit custom exports (based on the permissions for specific exports) and create new custom exports. For more information, see the *Chancery SMS Import/Export Guide*.

To work with custom exports:

1   in the **Admin** menu, click **District Setup**. The District Setup page appears.
2   Under **Tools**, click **Customize Exports**. The Customize Exports page appears.

Dependencies: None

Settings:

- **Yes**: The user can add, edit, or delete custom exports.
- **No**: The user is unable to view or work with custom exports.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **Yes**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Output Exports to File permission

This permission control's the user's ability to specify a location on the network in which to save an export file so that it can be imported by another application. For more information, refer to the *Chancery SMS Import/Export Guide*.

To specify a location for an export file:

1   In the **Admin** menu, click **Exports**. The Exports page appears.
2   Click an export. The Export Options page appears.
3   Under **Output Options**, ensure that **Output to File** is selected.
4   For **File**, enter a file name.
5   For **Path**, specify a location on the network.

Dependencies: None

Settings:

- **Yes**: The user can select **Output to File** for an export and specify a file name and path.
- **No**: The user is unable to select **Output to File**.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Schedule Exports permission

This permission controls the user's ability to specify when PowerSchool SMS runs an export: immediately, once on a specific date, or on a recurring schedule. For more information, refer to the *Chancery SMS Import/Export Guide*.

To schedule an export:
1 In the **Admin** menu, click **Exports**. The Exports page appears.
2 Click an export. The Export Options page appears.
3 Under **Scheduling Options**, specify when PowerSchool SMS is to run the export.

Dependencies:

- For this permission to be effective for a particular export, the user's permission setting for that export must be View. To set an export's permission, on the Customize Export page, open the export for editing and go to the Permissions section.

Settings:

- **Yes**: The user can schedule an export.
- **No**: The user is unable to schedule an export.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **Yes**
- Teacher: **Yes**
- School Health Professional: **No**
- District Health Professional: **No**

Schedule Health Office/SETS Export permission

This permission controls the user's ability to export data to a file for use by HealthOffice and SETS. For more information, refer to the *Chancery SMS Import/Export Guide*.

To export data to a file for use by HealthOffice/SETS:
1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Tools**, click **Schedule HealthOffice/SETS Export**.

Dependencies: None

Settings:

- **Yes**: The user can export to a file for use by HealthOffice and SETS.
- **No**: The user is unable to export to a file for use by HealthOffice and SETS.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Facilities Management permissions

Permissions in this category pertain to the setup of buildings and rooms [p. 200]. These permissions include:

- *Buildings permission* [p. 668]
- *Rooms permission* [p. 668]

Buildings permission

This permission controls the user's ability to set up a school's buildings [p. 200].

Dependencies:

- This permission applies only to a role with a school-level scope [p. 240].

Settings:

- **Delete**: The user can add, edit, or delete a school's buildings.
- **Edit**: The user can add or edit a school's buildings.
- **View**: The user can view but not change a school's buildings.
- **None**: The user is unable to view or work with a school's buildings.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **Delete**
- Teacher: **None**
- School Health Professional: **View**
- District Health Professional: **View**

Rooms permission

This permission controls the user's ability to define the rooms [p. 201] in the school's buildings.

Dependencies:

- This permission applies only to a role with a school-level scope [p. 240].
- For this permission's setting to be effective, the setting for the *Buildings permission* [p. 668] must be Delete, Edit or View, since

that permission controls the user's access to the Buildings page, which contains the Rooms link.

Settings:

- **Delete**: The user can add, edit, or delete a school's rooms.
- **Edit**: The user can add or edit a school's rooms.
- **View**: The user can view but not change a school's rooms.
- **None**: The user is unable to view or work with a school's rooms.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **Delete**
- Teacher: **None**
- School Health Professional: **View**
- District Health Professional: **View**

Families permissions

Permissions in this category pertain to the recording of information about a student's family [p. 70]. These permissions include:

- *Add Families permission* [p. 669]
- *Delete Families permission* [p. 670]
- *Family Information permission* [p. 670]

Add Families permission

This permission controls the user's ability to add new families to a system [p. 70].

Dependencies:

- This permission takes effect only on a system that employs family management (which is enabled when the administrator installs PowerSchool SMS [p. 403]).
- For the user to view the Family Search page [p. 50], that user's setting for *Family Information permission* [p. 670] must be View or Edit.
- The user's ability to edit family information is controlled by the *Family Information permission* [p. 670].
- The user's ability to delete families is controlled by the *Delete Families permission* [p. 670].

Settings:

- **Yes**: The user can add families.
- **No**: The user is unable to add families. On the Family Search page in the Actions menu, PowerSchool SMS does not display the Add Family... selection.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **Yes**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Delete Families permission

This permission controls the user's ability to delete families from a system [p. 70].

Dependencies:

- This permission takes effect only on a system that employs family management (which is enabled when the administrator installs [p. 403]).
- The user can delete a family only if that family has no students or contacts.
- For the user to view the Family Search page [p. 50], that user's setting for *Family Information permission* [p. 670] must be View or Edit.
- The user's ability to edit family information is controlled by the *Family Information permission* [p. 670].
- The user's ability to add families is controlled by the *Add Families permission* [p. 669].

Settings:

- **Yes**: The user can delete families.
- **No**: The user cannot delete families. On the Family Search page in the Actions menu, PowerSchool SMS does not display the Delete Family... selection.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Family Information permission

This permission controls the user's ability to search for families in the system, and, once found, view and change information about those families.

Dependencies:

- This permission takes effect only on a system that employs family management (which is enabled when the administrator installs PowerSchool SMS [p. 403]).
- For a user whose role's scope is at the school level [p. 240] to view the Student Demographics page [p. 55] (on which PowerSchool SMS displays the Family link in the control bar), the setting for the *Demographic Data permission* [p. 773] must be View or Edit.
- This permission affects several others: *Add Families permission* [p. 669], *Delete Families permission* [p. 670], and *Assign Family permission* [p. 766].

Settings:

- **Edit**: The user can search for families and change information about them. Specifically, on the Family Overview page [p. 70], the user can change the family name and add a contact, edit relationships, add a new student to the family, and add an existing student to the family.
- **View**: The user can view but not change information about families.
- **None**: The user cannot view information about families. On a student record, in the control bar, PowerSchool SMS does not display a Family link. Moreover, when the user clicks Family Search in the control bar, PowerSchool SMS displays the message "no access".

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **Edit**
- Teacher: **View**
- School Health Professional: **View**
- District Health Professional: **View**

Gradebook permissions

Permissions in this category pertain to the use of PowerTeacher Gradebook, a web-based gradebook that enables teachers to record student grades without being connected to the PowerSchool SMS system. Gradebook permissions include:

- *Use PowerTeacher Gradebook permission* [p. 671]

Use PowerTeacher Gradebook permission

This permission controls the user's ability to log into PowerTeacher gradebook using the PowerTeacher Quick Link on the Home page.

Dependencies: None

Settings:

- **Yes**: Users can log into PowerTeacher by clicking the PowerTeacher Quick Link on their home page.

- **No**: The PowerTeacher Quick Link does not appear on the user's home page.

Default settings by base role [p. 246]:
- District Administrator: **No**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Grading permissions

Permissions in this category pertain to the assigning of grades to a student [p. 84]. These permissions include:

- *Add Grades permission* [p. 672]
- *Backfill Grades permission* [p. 673]
- *Edit Grades from Other Teachers permission* [p. 673]
- *Enter Grades for All Classes permission* [p. 674]
- *Honor Rolls permission* [p. 675]
- *Modify Grades for Completed Periods permission* [p. 676]
- *Override Calculated Grades permission* [p. 676]
- *Override Student Ranks permission* [p. 677]
- *Override/Recalculate Earned Credits permission* [p. 678]
- *Run Class Ranks permission* [p. 679]
- *Run Grade, Credit & GPA Calculations permission* [p. 679]
- *Transfer Grades and Attendance permission* [p. 680]

For permissions pertaining to grading setup, refer to *School Setup permissions* [p. 702].

Add Grades permission

This permission controls the user's ability to add or change a student's grades [p. 84].

Dependencies:
- This permission's "No" setting supersedes all other Grading permissions.
- This permission applies to a role with a school-level scope [p. 240]. (A role with district-level scope is unable to view the grading pages.)
- For a user to change the grade of a student who is not assigned to him or her, the setting for the *Enter Grades for All Classes permission* [p. 674] and the *Edit Grades from Other Teachers permission* [p. 673] must be Yes.

Settings:

- **Yes**: The user can add or change the grade of any student.
- **No**: The user is able to view but not add or change the grade of any student.

Default settings by base role [p. 246]:
- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **Yes**
- Teacher: **Yes**
- School Health Professional: **No**
- District Health Professional: **No**

Backfill Grades permission

This permission controls the user's ability to enter a student's grade for a class in a previous grading period [p. 86]; that is a grading period that occurred before the student was scheduled into the class.

Dependencies:
- This permission applies to a role with a school-level scope [p. 240]. (A role with district-level scope is unable to view the grades pages.)
- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:
- **Yes**: The user can add or change a student's grade for a class in a previous grading period.
- **No**: The user is not able to view, add, or change a student's grade for a class in a previous grading period.

Default settings by base role [p. 246]:
- District Administrator: **No**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Edit Grades from Other Teachers permission

This permission controls the user's ability to change the grades of an elementary student where those grades were assigned by another user [p. 84]. Typically, this permission enables a teacher to work with the grades of a student that he or she does not teach.

Dependencies:

- This permission applies to a role with a school-level scope [p. 240]. (A role with district-level scope is unable to view the grading pages.)
- This permission applies only to a school that employs elementary scheduling [p. 282]
- Normally, a teacher can work only with the records of students assigned to him or her. For a user to work with the record of a student for whom the user is not responsible, the setting for the *Access to All Students permission* [p. 732] must be Yes.
- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Yes**: The user can change the grade of an elementary student where that grade was assigned by another user.
- **No**: The user is unable to change the grade of an elementary student where that grade was assigned by another user.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **Yes**
- School Health Professional: **No**
- District Health Professional: **No**

Enter Grades for All Classes permission

This permission controls the user's ability to assign grades [p. 84] to a secondary student in a class for which the user is not responsible. Typically, this permission enables a teacher to work with the grades of a student that he or she does not teach.

Dependencies:

- This permission applies to a role with a school-level scope [p. 240]. (A role with district-level scope is unable to view the grading pages.)
- This permission applies only to a school that employs secondary scheduling [p. 285].
- Normally, a teacher can work only with the records of students assigned to him or her. For a user to work with the record of a student for whom the user is not responsible, the setting for the *Access to All Students permission* [p. 732] must be Yes.
- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Yes**: The user can assign a grade to a secondary student in a class for which the user is not responsible.
- **No**: The user is unable to assign a grade to a secondary student in a class for which the user is not responsible.

Default settings by base role [p. 246]:
- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Honor Rolls permission

This permission controls the user's ability to assign a student to an honor roll [p. 75] and have PowerSchool SMS calculate the students eligible for an honor roll. For detailed information on honor rolls, refer to the *PowerSchool SMS Grading Setup Guide*. **Note**: The calculation of honor roles is a task associated with year-end [p. 453].

To view a student's honor roll membership:
1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.
2 In the control bar, click **Honor Rolls**. The Student Honor Rolls page appears.

To work with an honor roll:
1 In the **Admin** menu, click **Grading**. The Grading page appears.
2 Under **Step 7**, click **Calculate Honor Rolls**. The Honor Rolls page appears.

Dependencies:
- This permission applies to a role with a school-level scope [p. 240]. (A role with district-level scope is unable to view the honor roll pages.)
- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.
- For the user to set up honor rolls, refer to the *Honor Rolls Definitions permission* [p. 722].
- For the user to add a student to an honor roll for which that student is not eligible, refer to the *Override Honor Rolls permission* [p. 782].

Settings:
- **Edit**: The user can assign a student to an honor roll and have PowerSchool SMS calculate the students eligible for an honor roll.
- **View**: The user can view but not change honor roll membership.

- **None**: The user is unable to view honor roll membership.

Default settings by base role [p. 246]:
- District Administrator: **None**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Modify Grades for Completed Periods permission

This permission controls the user's ability to change a student's grades for a past grading period [p. 84]. For detailed information on grading periods, refer to the *PowerSchool SMS Grading Setup Guide*. Note: The recalculation of grades is a task associated with year-end [p. 453].

Dependencies:
- This permission applies to a role with a school-level scope [p. 240]. (A role with district-level scope is unable to view the grades pages.)
- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:
- **Yes**: The user can assign a grade to a student for a past grading period.
- **No**: The user is unable to assign a grade to a student for a past grading period.

Default settings by base role [p. 246]:
- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Override Calculated Grades permission

This permission controls the user's ability to change a student's grade that has been calculated by PowerSchool SMS [p. 84]. For detailed information on calculated grades, refer to the *PowerSchool SMS Grading Setup Guide*. Note: The recalculation of grades is a task associated with year-end [p. 453].

To override a calculated grade:

1 In the **Class** menu, click **Classes**. The Classes page appears.

2 Click the Grading icon for a class.

3 Click the Calculated Grades icon. The Override Calculated Grades dialog appears.

Or

1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.

2 In the control bar, click **Grade**. The Grades page appears.

3 Click the Calculated Grades icon. The Override Calculated Grades dialog appears.

Dependencies:

- This permission applies to a role with a school-level scope [p. 240]. (A role with district-level scope is unable to view the grade pages.)

- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

- The ability to have PowerSchool SMS calculate grades is controlled by the *Run Grade, Credit & GPA Calculations permission* [p. 679].

Settings:

- **Yes**: The user can change a student's calculated grade.

- **No**: The user is unable to change a student's calculated grade.

Default settings by base role [p. 246]:

- District Administrator: **No**

- School Administrator: **Yes**

- School Counselor: **Yes**

- School Secretary: **No**

- Teacher: **No**

- School Health Professional: **No**

- District Health Professional: **No**

Override Student Ranks permission

This permission controls the user's ability to change a student's class rank (which was calculated by PowerSchool SMS). For detailed information on student class ranking, refer to the *PowerSchool SMS Grading Setup Guide*. **Note**: The calculation of class ranks is a task associated with year-end [p. 454].

To work with a student's class rank:

1 In the **Admin** menu, click **Grading**. The Grading page appears.

2 Under **Step 7**, click **Calculate Class Ranks**. The Calculate Class Ranks page appears.

3 Click the date link for one of the sets of class ranks. The Student Ranks page appears.

4 Click the **Stored** tab.

Dependencies:

- This permission applies to a role with a school-level scope [p. 240]. (A role with district-level scope is unable to view the grading pages.)
- For the user to view calculated class ranks, the setting for the *Run Class Ranks permission* [p. 679] must be Yes.

Settings:

- **Yes**: The user can change a student's calculated class rank.
- **No**: The user can view but not change a student's calculated class rank.

Default settings by base role [p. 246]:

- District Administrator: **No**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Override/Recalculate Earned Credits permission

This permission controls the user's ability to override or have PowerSchool SMS recalculate the number of credits earned by a student for specific grade items. For detailed information on credits, refer to the *PowerSchool SMS Grading Setup Guide*. Note: The recalculation of credits is a task associated with year-end [p. 453].

To override or recalculate a student's earned credits:

1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.
2 In the control bar, click **Credits**. The Student Credits page appears.
3 In the Actions menu, click **Override/Recalculate Credits**.

Dependencies:

- This permission applies to a role with a school-level scope [p. 240]. (A role with district-level scope is unable to view the credits page.)

Settings:

- **Yes**: The user can override or have PowerSchool SMS recalculate a student's earned credits.
- **No**: The user can view but not change a student's calculated earned credits.

Default settings by base role [p. 246]:

- District Administrator: **No**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**

- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Run Class Ranks permission

This permission controls the user's ability to have PowerSchool SMS calculate a student's class rank by grade level. For detailed information on student class ranking, refer to the *PowerSchool SMS Grading Setup Guide*. **Note**: The calculation of class ranks is a task associated with year-end [p. 454].

To have PowerSchool SMS calculate a student's class rank:

1 In the **Admin** menu, click **Grading**. The Grading page appears.
2 Under **Step 7**, click **Calculate Class Ranks**. The Calculate Class Ranks page appears.
3 For each grade level, click **Run**.

Dependencies:

- This permission applies to a role with a school-level scope [p. 240]. (A role with district-level scope is unable to view the grading pages.)

Settings:

- **Yes**: The user can have PowerSchool SMS calculate a student's class rank.
- **No**: The user is unable to have PowerSchool SMS calculate a student's class rank.

Default settings by base role [p. 246]:

- District Administrator: **No**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Run Grade, Credit & GPA Calculations permission

This permission controls the user's ability to have PowerSchool SMS calculate a student's grades, credits, and GPA. Credits and GPA pertain to a secondary school student. This permission also controls access to the calculation of grades for an elementary school student. For detailed information on such calculations, refer to the *PowerSchool SMS Grading Setup Guide*. **Note**: These calculations are associated with year-end [p. 453].

To run grade, credit, and GPA calculations for a secondary school student:

1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.

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2 In the control bar, click **Grading**. The Grading page appears.
3 Under **Step 7**, click Calculated Grades, Credits & GPAs.

To run grade calculations for an elementary school student:

1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.
2 In the control bar, click **Grading**. The Grading page appears.
3 Under **Step 6**, click Calculate Elementary Grades.
- PowerSchool SMS alerts [p. 33] the administrator when the calculation are complete or have failed, provided the administrator has subscribed [p. 34] to the "Calculate Elementary Grades" alert.

Dependencies:
- This permission applies to a role with a school-level scope [p. 240]. (A role with district-level scope is unable to view the grading pages.)
- The Calculate Elementary Grades link appears only if the District Administrator has added the stored procedure "CALC_ELEMENTARY_ GRADES". Since this stored procedure is not added to the base schema, the administrator must add it after any software upgrade [p. 417].

Settings:
- **Yes**: The user can have PowerSchool SMS calculate grades, credits, and GPA.
- **No**: The user is unable to have PowerSchool SMS calculate grades, credits, and GPAs. On the Grading page, PowerSchool SMS does not display the Calculated Grades, Credits & GPAs link (secondary school) or the Calculate Elementary Grades link (elementary).

Default settings by base role [p. 246]:
- District Administrator: **No**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Transfer Grades and Attendance permission

This permission controls the user's ability to transfer a student's grades and attendance from one class to another. For information, refer to the *Chancery SMS Transferring Grades and Attendance Technical Bulletin*.
Note: Since this ability is needed only temporarily, the setting for this permission is typically No for all users.

To transfer a student's grades and attendance:

1 Working in the Active Calendar, locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.

2 In the control bar, click **Schedule**. The Student Schedule page appears.

3 In the **Actions** menu, click **View Change History**. The Change History page appears.

4 In the **Actions** menu, click **Transfer Grades**.

Dependencies:

- This permission applies to a role with a school-level scope [p. 240]. (A role with district-level scope is unable to view the grading pages.)

- This permission applies only to a user working in the Active Calendar [p. 169].

- For this permission to take effect, the setting for the *Edit Student Schedules permission* [p. 776] must be Yes.

- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Yes**: The user can transfer a student's grades and attendance.

- **No**: The user is unable to transfer a student's grades and attendance. On the Change History page, in the Actions menu, PowerSchool SMS does not display the Transfer Grades selection.

Default settings by base role [p. 246]:

- District Administrator: **No**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Import permissions

Permissions in this category pertain to importing data into a system. These permissions include:

- *Import Address Ranges permission* [p. 681]
- *Import Custom Student Data permission* [p. 682]
- *Import Student Demographics permission* [p. 683]
- *Import Student Test Scores permission* [p. 684]
- *Schedule Import permission* [p. 685]
- *Template Editor permission* [p. 686]

Import Address Ranges permission

This permission controls the user's ability to import address ranges for use in address validation [p. 258]. For detailed information about importing, refer the *Chancery SMS Import/Export Guide*.

To import address ranges:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Tools**, click <u>Schedule Import</u>. The Schedule Import page appears.

Dependencies:

- For control of the user's ability to create a template for address ranges, refer to the *Template Editor permission* [p. 686].
- For control of the user's the ability to schedule an import, refer to the *Schedule Import permission* [p. 685].

Settings:

- **Yes**: The user can import address ranges.
- **No**: The user cannot import address ranges. On the Schedule Import page, the user can schedule the import and PowerSchool SMS will complete it on schedule however PowerSchool SMS will report errors—in the error log, PowerSchool SMS will record that the user did not have permission to perform the import.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Import Custom Student Data permission

This permission controls the user's ability to import information into some custom fields created using Custom Data Management (Student Data) in cTools [p. 472], specifically into custom multi-select lists, custom repeating groups, or custom chronological groups.

This permission does not control the ability to import all types of custom data:

- The *Import Student Demographics permission* [p. 683] control's the user's ability to import data into custom Basic tables.
- The *Schedule Import permission* [p. 685] control the user's ability to import data into custom fields created using cTools.
- The *Template Editor permission* [p. 686] controls the user's ability to create a template for custom student data.

For information about importing, refer the *Chancery SMS Import/Export Guide*. For information about Custom Data Management, refer to the *Chancery SMS cTools Guide*.

To import custom data:

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1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Tools**, click <u>Import...</u>. The PowerSchool SMS Import popup page appears.
3 Click **Start Import Wizard**. The Introduction page appears.
4 On the Introduction page, click **Next**. The Import File and Template page appears.
5 In the **Select Import Template** list, select a template.

Dependencies:

- If the setting for the *Import Student Demographics permission* [p. 683] and the *Import Student Test Scores permission* [p. 684] is No, PowerSchool SMS display a "no access" message displays when the user clicks <u>Import...</u> on the District Setup page.

Settings:

- **Yes**: The user can import data into custom multi-select lists, custom repeating groups, or custom chronological groups. On the Import File and Template page, in the Select Import Template list, PowerSchool SMS lists "Student Multi-select", "CDM Student Repeating Group", and "CDM Student Chronological".
- **No**: The user cannot import data into custom multi-select lists, custom repeating groups, or custom chronological groups.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Import Student Demographics permission

This permission controls the user's ability to import district student data, specifically demographic information.

This permission does not control the ability to import all types of student data:

- The *Schedule Import permission* [p. 685] control the user's ability to school-specific student data.
- The *Template Editor permission* [p. 686] controls the user's ability to create a template for custom student data.

For information about importing, refer the *Chancery SMS Import/Export Guide*.

To import student demographics data:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.

2 Under **Tools**, click <u>Import...</u>. The PowerSchool SMS Import
   popup page appears.
3 Click **Start Import Wizard**. The Introduction page appears.
4 On the Introduction page, click **Next**. The Import File and
   Template page appears.
5 In the **Select Import Template** list, select the template
   "Student Demographics".

Dependencies:

- If the setting for the *Import Student Test Scores permission* [p. 684]
  and the *Import Custom Student Data permission* [p. 682] is No,
  PowerSchool SMS display a "no access" message displays when the
  user clicks <u>Import...</u> on the District Setup page.

Settings:

- **Yes**: The user can import student demographic data. On the Import
  File and Template page, in the Select Import Template list,
  PowerSchool SMS lists "Student Demographics".
- **No**: The user cannot import student demographics data.

Default settings by base role [p. 246]:
- District Administrator: **Yes**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Import Student Test Scores permission

On a system that employs the legacy version of the Test Scores module, this
permission controls the user ability to import test data, specifically test
scores.

This permission does not control the ability to import all types of student
data. The *Template Editor permission* [p. 686] controls the user's ability to
create a template for student test scores. For information about importing,
refer the *Chancery SMS Import/Export Guide*.

To import student test scores:
1 In the **Admin** menu, click **District Setup**. The District Setup
   page appears.
2 Under **Tools**, click <u>Import...</u>. The PowerSchool SMS Import
   popup page appears/
3 Click **Start Import Wizard**. The Introduction page appears.
4 On the Introduction page, click **Next**. The Import File and
   Template page appears.
5 In the **Select Import Template** list, select the template
   "Student Test Scores".

Dependencies:

- This permission takes effect only when the administrator has enabled legacy tests functionality on the General Preferences page.
- If the setting for the *Import Student Demographics permission* [p. 683] and the *Import Custom Student Data permission* [p. 682] is No, PowerSchool SMS display a "no access" message displays when the user clicks <u>**Import...**</u> on the District Setup page.

Settings:

- **Yes**: The user can import student test scores.
- **No**: The user cannot import student test scores.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Schedule Import permission

This permission controls the user's ability to schedule the importing of data for the following record types:

- Setup Lists
- School Students
- Student Contacts
- District Courses
- Facility Buildings
- Facility Rooms
- Historical Years
- Historical Courses
- Historical Course Bins
- Staff
- Class Schedules
- Student Schedules
- Student Course Requests
- Address Ranges
- Student Test Results
- Historical Graduation Information

To import other types of student data, refer to the following permissions:

- The *Import Student Demographics permission* [p. 683] controls the user's ability to import student demographic information.
- The *Import Custom Student Data permission* [p. 682] controls the user's ability to import custom data.
- The *Import Student Test Scores permission* [p. 684] controls the user's ability to import test scores.

- The *Import Address Ranges permission* [p. 681] controls the user's ability to create an import template for custom student data.
- The *Template Editor permission* [p. 686] controls the user's ability to create an import template for student test scores.

For information about importing, refer the *Chancery SMS Import/Export Guide*.

To schedule a data import:

1   In the **Admin** menu, click **District Setup**. The District Setup page appears.
2   Under **Tools**, click <u>Schedule Import</u>. The Schedule Import page appears.

Dependencies: None

Settings:

- **Yes**: The user can schedule the importing of student data and delete scheduled imports.
- **No**: The user cannot schedule the importing of student data. On the District Setup page, if the user clicks <u>Schedule Import</u>, PowerSchool SMS displays a "no access" message.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Template Editor permission

This permission controls the user's ability to use the Template Editor to create templates for importing data into a system. The Template Editor is an application that runs on the Chancery SMS web server.

This permission does not differentiate between user roles. When this permission's setting is Yes for a user, and that user has more than one role, the user can create a template in any one his or her roles.

For information about the Template Editor, refer the *Chancery SMS Import/Export Guide*.

To work with the Template Editor:

1   Sign in to the PowerSchool SMS web server.
2   In the **Start** menu, select **Programs > Pearson> PowerSchool SMS > Template Editor**. The PowerSchool SMS ACSII Template Editor Log On dialog appears.
3   Enter the user name and password created when PowerSchool SMS was installed. The Template Editor opens.

Dependencies: None

Settings:

- **Yes**: The user can use the Template Editor to create templates for importing data into a system.
- **No**: The user does not have access to the Template Editor.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Program Category permissions

Permissions in this category pertain to managing applicants to programs and setting up programs [p. 88]. These permissions include:

- *Assign to Program permissions* [p. 687]
- *Assign to Program - Override Eligibility permission* [p. 688]
- *District Program Setup permission* [p. 689]
- *Manage Participants permission* [p. 690]
- *Remove from Program permission* [p. 692]
- *School Program Setup permission* [p. 693]

Assign to Program permissions

This permission controls the user's ability to place a program applicant in a program [p. 88] of a specific category. PowerSchool SMS provides one permission for each of the following program categories:

- Academic Enhancement
- After School Academic
- After School Athletics
- Early Childhood Education
- English Language Learners
- Free & Reduced Meals
- Gifted and Talented
- Home Hospital
- Homeless
- Migrant Status
- Out of District Placement
- Special Services
- Transportation
- <any user-created program category>

For further information, refer to the *PowerSchool SMS Program Management Guide*.

To place a program applicant in a program of a specific category:

1 In the **School** menu, click **Manage Programs**. The Program Search page appears.
2 Search for the program.
   • Or click <u>**Display All Records**</u>.
3 Select the program.
4 From the Actions menu, select **Manage Queues and Applicants**. The Manage Queues page appears.
5 In the **# Applications** column, click the number of applicants. The Manage Applicants page appears.
6 Select an applicant.
7 From the **Actions** menu, select **Assign to Program**.

Dependencies: None

Settings:

• **Yes**: The user can assign a program applicant to a program of the specified category.
• **No**: The user is unable to assign a program applicant to a program of the specified category.

Default settings by base role [p. 246]:

• District Administrator: **Yes**
• School Administrator: **Yes**
• School Counselor: **Yes**
• School Secretary: **No**
• Teacher: **No**
• School Health Professional: **No**
• District Health Professional: **No**

Assign to Program - Override Eligibility permission

This permission controls the user's ability to override the eligibility calculations for an applicant to a program [p. 88] of a specific category, that is, make an ineligible applicant eligible. PowerSchool SMS provides one permission for each of the following program categories:

• Academic Enhancement
• After School Academic
• After School Athletics
• Early Childhood Education
• English Language Learners
• Free & Reduced Meals
• Gifted and Talented
• Home Hospital
• Homeless

- Migrant Status
- Out of District Placement
- Special Services
- Transportation
- <any user-created program category>

For further information, refer to the *PowerSchool SMS Program Management Guide*.

To make an ineligible applicant eligible for a program of a specific category [SA[1]]:

1 In the **School** menu, click **Manage Programs**. The Program Search page appears.
2 Search for the program.
    - Or click **Display All Records**.
3 Select the program.
4 From the Actions menu, select **Manage Queues and Applicants**. The Manage Queues page appears.
5 In the **# Applications** column, click the number of applicants. The Manage Applicants page appears.
6 Select an ineligible applicant.
7 From the **Actions** menu, select **Assign to Program**. A dialog appears.
8 Enter an override reason and click **OK**.

Dependencies: None

Settings:

- **Yes**: The user can make an ineligible applicant eligible for a program of the specific category.
- **No**: The user is unable to make an ineligible applicant eligible for a program of the specific category.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

District Program Setup permission

This permission controls the user's ability to set up a program [p. 88] of a specific category for use across the district. PowerSchool SMS provides one permission for each of the following program categories:

- Academic Enhancement

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[1]You can do this if your role is School Administrator.

- After School Academic
- After School Athletics
- Early Childhood Education
- English Language Learners
- Free & Reduced Meals
- Gifted and Talented
- Home Hospital
- Homeless
- Migrant Status
- Out of District Placement
- Special Services
- Transportation
- <any user-created program category>

For further information, refer to the *PowerSchool SMS Program Management Guide*.

To set up a program of a specific category [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Program Management**, click **Program Setup**. The Program Setup page appears.
3 From the **Actions** menu, select **Add Program Setup...**.

Dependencies: None

Settings:

- **Delete**: The user can add a program setup of the specified category
- **Edit**: Same as Delete
- **View**: The user is unable to add a program setup of the specified category
- **None**: Same as View

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Manage Participants permission

This permission controls the user's ability to manage the participants of a program [p. 88] of a specific category, including removing participants,

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[1]You can do this if your role is District Administrator.

calculating eligibility, and managing applicants. PowerSchool SMS provides one permission for each of the following program categories:

- Academic Enhancement
- After School Academic
- After School Athletics
- Early Childhood Education
- English Language Learners
- Free & Reduced Meals
- Gifted and Talented
- Home Hospital
- Homeless
- Migrant Status
- Out of District Placement
- Special Services
- Transportation
- <any user-created program category>

For further information, refer to the *PowerSchool SMS Program Management Guide*.

To manage the participants of a program of a specific category [DA[1]]:

1 In the **School** menu, click **Manage Programs**. The Program Search page appears.
2 Search for the program.
   - Or click **Display All Records**.
3 Select the program.
4 From the Actions menu, select **Manage Participants**. The Manage Participants page appears.

Dependencies: None

Settings:

- **Delete**: The user can remove participants from a program of the specified category and calculate a participant's eligibility.
- **Edit**: The user can calculate a participant's eligibility.
- **View**: The user can view but not remove participants of a program of the specified category.
- **None**: The user is unable to manage participants of a program of the specified category.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **None**

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[1]You can do this if your role is District Administrator.

- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Remove from Program permission

This permission controls the user's ability to remove participants from a program [p. 88] of a specific category. PowerSchool SMS provides one permission for each of the following program categories:

- Academic Enhancement
- After School Academic
- After School Athletics
- Early Childhood Education
- English Language Learners
- Free & Reduced Meals
- Gifted and Talented
- Home Hospital
- Homeless
- Migrant Status
- Out of District Placement
- Special Services
- Transportation
- <any user-created program category>

For further information, refer to the *PowerSchool SMS Program Management Guide*.

To remove a participant of a program of a specific category [DA[1]]:

1 In the **School** menu, click **Manage Programs**. The Program Search page appears.
2 Search for the program.
  - Or click **Display All Records**.
3 Select the program.
4 From the Actions menu, select **Manage Participants**. The Manage Participants page appears.
5 Select a participant.
6 From the **Actions** menu, select **Remove from Program...**.

Dependencies:

- For this permission to be effective, the setting for the *Manage Participants permission* [p. 690] must be Delete.

Settings:

- **Yes**: The user can remove participants from a program of the specified category.

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[1]You can do this if your role is District Administrator.

- **No**: The user is unable to remove participants from a program of the specified category.

Default settings by base role [p. 246]:
- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

School Program Setup permission

This permission controls the user's ability to set up a program [p. 88] of a specific category for use in a school. PowerSchool SMS provides one permission for each of the following program categories:
- Academic Enhancement
- After School Academic
- After School Athletics
- Early Childhood Education
- English Language Learners
- Free & Reduced Meals
- Gifted and Talented
- Home Hospital
- Homeless
- Migrant Status
- Out of District Placement
- Special Services
- Transportation
- <any user-created program category>

For further information, refer to the *PowerSchool SMS Program Management Guide*.

To set up a program of a specific category for a school [SA[1]]:

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.
2 Under **Program Management**, click <u>Program Setup</u>. The Program Setup page appears.
3 From the **Actions** menu, select **Add Program Setup...**.

Dependencies: None

Settings:

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[1]You can do this if your role is School Administrator.

- **Delete**: The user can add and change a program setup of the specified category to the school, and delete a program setup.
- **Edit**: The user can add and change a program setup of the specified category to the school.
- **View**: The user can view but not change a program setup of the specified category to the school.
- **None**: The user is unable to work with a program setup of the specified category to the school or view its sessions.

Default settings by base role [p. 246]:

- District Administrator: **View**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Reporting permissions

Permissions in this category pertain to generating reports from information stored in the system [p. 114]. These permissions include:

- *Create Custom Reports permission* [p. 694]
- *Grid Print (Landscape-Legal) permission* [p. 695]
- *Output Reports to File permission* [p. 695]
- *Print Official Report Card permission* [p. 696]
- *<Report> permission* [p. 696]
- *Schedule Reports permission* [p. 702]

Create Custom Reports permission

This permission enables the user to edit a report or create a new custom report [p. 127]. Note: For each custom report created by a user, PowerSchool SMS makes available a permission of the same name see *<Report> permission* [p. 696] to enable the District Administrator control access to that report.

Dependencies:

- For a user to edit a report, the user's setting for that report's permission [p. 696] must be Edit or Delete.

Settings:

- **Yes**: The user can edit a report or create a new custom report.
- **No**: The user is unable to edit a report or create a new custom report. On the School Setup and District Setup pages, PowerSchool SMS does not display any links to report customization.

Default settings by base role [p. 246]:

- District Administrator: **Yes**

- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **Yes**
- Teacher: **No**
- School Health Professional: **Yes**
- District Health Professional: **Yes**

Grid Print (Landscape-Legal) permission

This permission controls the user's ability to use a Grid Print template when creating a custom report.

Dependencies: None

Settings:
- **Edit**: The user can use a Grid Print template when creating a custom report.
- **View**: The user is unable to use a Grid Print template when creating a custom report.
- **None**: Same as View.

Default settings by base role [p. 246]:
- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **View**
- District Health Professional: **View**

Output Reports to File permission

This permission controls the user's ability to, when running a report, use the "Output to file" option to send the report results to a file see *Report results* [p. 123].

Dependencies:
- For a user to set a report's output options, the user's setting for that report's permission [p. 696] must be Edit or Delete.

Settings:
- **Yes**: The user can output a report's results to a file.
- **No**: The user is unable to output a report's results to a file.

Default settings by base role [p. 246]:
- District Administrator: **Yes**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**

- School Health Professional: **No**
- District Health Professional: **Yes**

Print Official Report Card permission

This permission controls the user's ability to print official report cards [*Elementary Report Card* p.600] [*Secondary Report Card* p.602] [*Secondary Report Card* p.602]. An unofficial report card is printed with the watermark "Unofficial". For more information about report cards, refer to the *PowerSchool SMS Grading Setup Guide*.

Dependencies:
- For the "Print official report card" option to be available to the user, the setting for the *Room Schedule* [p. 573] must be Edit or Delete.
- For the "Print official report card" option to be available to the user, the setting for the report card's *<Report> permission* [p. 696] must be Edit or Delete.

Settings:
- **Yes**: The user can print an official report card.
- **No**: The user can print only an unofficial version of a report card.

Default settings by base role [p. 246]:
- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **Yes**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

<Report> permission

This permission controls the user's ability to run, change, or delete a report [p. 114]. The District Administrator can set this permission separately for each report in the system see *PowerSchool SMS Report Package reports* [p. 533] see *PowerSchool SMS built-in reports* [p. 594].

Dependencies:
- For the user to view the Customize Reports, District Report List, and School Report List pages, the setting for the *Create Custom Reports permission* [p. 694] must be Yes.

Settings:
- **Delete**: The user is able to run, change, or delete the report. **Note**: The user cannot delete a built-in report [p. 594].
- **Edit**: The user is able to run the report and to change it.
- **View**: The user is able to run the report but not change or delete it. PowerSchool SMS does not display the report on the Customize Reports, District Report List, and School Report List pages.

- **None**: The user does not have access to the report. PowerSchool SMS disables the link to the report on School Reports or District Reports page as well as in the Reports menu on relevant pages. PowerSchool SMS does not display the report on the Customize Reports, District Report List, and School Report List pages.

Table 88: **Reports: Default permission settings by base role [p. 246]**

Report Name	Cross ref.	District Admin	School Admin	School Coun-selor	School Sec-retary	Teache-r	School Health Prof.	District Health Prof.
ADA/ADM Summary Report	[p. 590]	Edit	Edit	Edit	View	None	None	None
Address Out of Zone Report (District)	[p. 533]	Edit	View	View	View	None	None	None
Address Out of Zone Report (School)	[p. 533]	Edit	View	View	View	None	None	None
Age Breakdown Summary Report	[p. 610]	Edit	Edit	Edit	View	View	View	None
Attendance Exceptions Student List Report	[p. 599]	None	Edit	Edit	Edit	View	None	None
Daily Attendance Phone Register	[p. 587]	Edit	Edit	Edit	View	View	None	View
Award Certificate	[p. 603]	Edit	Edit	Edit	View	View	None	None
Student Behavior Summary	[p. 594]	Edit	Edit	Edit	View	None	None	None
PowerSchool SMS List of Reports	[p. 533]	Edit	Edit	Edit	View	None	Edit	Edit
Class Add/Drop	[p. 557]	Edit	Edit	Edit	View	View	Edit	Edit
Class Listing (Elementary)	[p. 558]	Edit	Edit	Edit	View	View	Edit	Edit
Class Roster	[p. 558]	Edit	Edit	Edit	None	None	None	None
Class Roster Monthly	[p. 559]	Edit	Edit	Edit	None	None	None	None
Class Roster Weekly	[p. 560]	Edit	Edit	Edit	None	None	None	None
Class Schedule Log	[p. 561]	Edit	Edit	Edit	None	None	None	None
Contact Mailing Labels	[p. 604]	Edit	Edit	Edit	View	View	View	View

Report Name	Cross ref.	District Admin	School Admin	School Counselor	School Secretary	Teacher	School Health Prof.	District Health Prof.
Contacts Roster	[p. 561]	Edit	Edit	Edit	View	View	Edit	Edit
Course Catalog by Name	[p. 562]	Edit	Edit	Edit	None	None	None	None
Course Catalog by Number	[p. 563]	Edit	Edit	Edit	None	None	None	None
Course Request Tally By Term By Dept	[p. 568]	Edit	Edit	Edit	None	None	None	None
Course Request List	[p. 564]	Edit	Edit	Edit	None	None	None	None
Course Request Rule Violations	[p. 565]	Edit	Edit	Edit	None	None	None	None
Course Request Tally	[p. 566]	Edit	Edit	Edit	None	None	None	None
Course Request Tally by Grade	[p. 566]	Edit	Edit	Edit	None	None	None	None
Course Request Tally by Term	[p. 567]	Edit	Edit	Edit	None	None	None	None
Course Request Verification	[p. 569]	Edit	Edit	Edit	None	None	None	None
Cumulative GPA	[p. 541]	Edit	Edit	Edit	View	View	Edit	Edit
Daily Absence By Period	[p. 534]	Delete	Delete	Delete	View	None	None	None
Daily Absence by Attendance Code	[p. 535]	Edit	Edit	Edit	View	View	Edit	Edit
Daily Attendance Summary	[p. 611]	None	Edit	Edit	View	View	None	None
Discipline Profile	[p. 586]	Edit	View	View	None	None	View	Edit
Elementary Progress	[p. 599]	Edit	Edit	Edit	View	View	None	None
Elementary Report Card	[p. 600]	Edit	Edit	Edit	View	View	None	None
Failing Grades Report (Secondary)	[p. 541]	None	Edit	Edit	View	None	None	None
Full Time Equivalent Summary	[p. 569]	Edit	Edit	Edit	None	None	None	None
Ethnicity by School and Grade	[p.	Edit	Edit	Edit	View	None	None	None

Report Name	Cross ref.	District Admin	School Admin	School Coun-selor	School Sec-retary	Teache-r	School Health Prof.	District Health Prof.
	612]							
Grades Verification	[p. 542]	Edit	Edit	Edit	View	View	Edit	Edit
Home Language Summary	[p. 613]	Edit	Edit	Edit	View	View	View	None
Homeroom Roster Emergency Contacts	[p. 588]	None	Edit	Edit	View	View	None	None
Homeroom Roster by Gender	[p. 605]	None	Edit	Edit	View	View	None	None
Homeroom Roster	[p. 606]	Edit	Edit	Edit	View	View	None	None
Honor Roll	[p. 543]	Edit	Edit	Edit	View	None	Edit	Edit
Immunization Delinquency Letter	[p. 551]	Delete	View	View	None	None	View	Delete
Immunization Next Due Report	[p. 551]	Delete	View	View	None	None	View	Delete
Immunization Non-Compliance Report	[p. 552]	Delete	View	View	None	None	View	Delete
Interval Attendance Report		Edit	Edit	Edit	View	View	None	None
Load Students Log	[p. 570]	Edit	Edit	Edit	None	None	None	None
Master Schedule	[p. 570]	Edit	Edit	Edit	None	None	None	None
Master Schedule by Meeting Pattern	[p. 571]	Edit	Edit	Edit	None	None	None	None
Missing Grades Report (Elementary)	[p. 544]	None	Edit	Edit	View	View	None	None
Missing Grades Report (Secondary)	[p. 545]	None	Edit	Edit	View	View	None	None
Open Seats Summary	[p. 571]	Edit	Edit	Edit	None	None	None	None
Period Attendance	[p. 535]	None	Edit	Edit	View	None	None	None
Room Matrix by Day Period	[p. 572]	Edit	Edit	Edit	None	None	None	None
Room Schedule	[p. 573]	Edit	Edit	Edit	None	None	None	None

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Report Name	Cross ref.	District Admin	School Admin	School Coun-selor	School Sec-retary	Teache-r	School Health Prof.	District Health Prof.
Room Schedule Matrix	[p. 574]	Edit	Edit	Edit	None	None	None	None
Scheduling Configuration	[p. 574]	Edit	Edit	Edit	None	None	None	None
Scheduling Performance Statistics	[p. 575]	Edit	Edit	Edit	None	None	None	None
Scheduling Pre-check Builder	[p. 576]	Edit	Edit	Edit	None	None	None	None
Scheduling Pre-check Loader	[p. 577]	Edit	Edit	Edit	View	None	Edit	Edit
School Calendar List	[p. 596]	None	Edit	Edit	View	View	View	None
School Conversion Log	[p. 597]	Edit	Edit	Edit	View	View	None	None
Secondary Progress	[p. 601]	Edit	Edit	Edit	View	None	None	None
Secondary Report Card	[p. 602]	Edit	Edit	Edit	View	None	None	None
Security Audit Summary	[p. 598]	Edit	Edit	Edit	View	View	None	None
Specific Grades Report (Secondary)	[p. 547]	None	Edit	Edit	View	None	None	None
Student Birthday List	[p. 607]	None	Edit	Edit	View	View	View	None
Student Change History	[p. 597]	Edit	Edit	Edit	View	None	None	None
Student Cumulative Attendance	[p. 537]	Edit	Edit	Edit	View	View	None	None
Student Directory	[p. 589]	Edit	Edit	Edit	View	View	View	View
Student Graduation Status	[p. 614]	View	Edit	Edit	View	View	None	None
Student Health Condition Report	[p. 552]	Delete	View	View	None	None	View	Delete
Student Immunization History	[p. 553]	Delete	View	View	None	None	View	Delete
Student List	[p. 607]	Edit	Edit	Edit	View	None	View	View
Student Mailing Labels	[p.	Edit	Edit	Edit	View	View	View	View

Report Name	Cross ref.	District Admin	School Admin	School Counselor	School Secretary	Teacher	School Health Prof.	District Health Prof.
	608]							
Student Medical	[p. 609]	Edit	Edit	Edit	View	None	Edit	Delete
Student Schedule	[p. 579]	Edit	Edit	Edit	View	None	None	None
Student Schedule (Elementary)	[p. 578]	Edit	Edit	Edit	View	View	Edit	Edit
Student Schedule Matrix	[p. 580]	Edit	Edit	Edit	None	None	None	None
Student Schedule Matrix (Elementary)	[p. 579]	Edit	Edit	Edit	View	View	Edit	Edit
Student Schedule Load Summary	[p. 581]	Edit	Edit	Edit	None	None	None	None
Student Test History Report	[p. 591]	Edit	View	View	View	View	View	Edit
Student Test Profile	[p. 592]	Edit	Edit	Edit	View	View	Edit	Edit
Student Transcript by Subject Area	[p. 548]	Edit	View	View	View	None	None	None
Student Transcript by Year	[p. 549]	Edit	View	View	View	None	None	None
Teacher Attendance Verification	[p. 538]	Delete	Delete	Delete	View	None	None	None
Teacher Schedule Matrix	[p. 582]	Edit	Edit	Edit	None	None	None	None
Teacher Matrix by Day Period	[p. 583]	Edit	Edit	Edit	None	None	None	None
Teacher Schedule	[p. 582]	Edit	Edit	Edit	None	None	None	None
Teacher Schedule Matrix	[p. 582]	Edit	Edit	Edit	None	None	None	None
Test Scores Below Minimum Requirements	[p. 592]	Edit	View	View	View	View	View	Edit
Test Session Details	[p. 593]	Edit	View	View	View	View	View	Edit
Test Session Summary	[p. 593]	Edit	View	View	View	View	View	Edit
Unscheduled Rooms	[p. 584]	Edit	Edit	Edit	None	None	None	None

Report Name	Cross ref.	District Admin	School Admin	School Counselor	School Secretary	Teacher	School Health Prof.	District Health Prof.
Unscheduled Student Analysis	[p. 584]	Edit	Edit	Edit	None	None	None	None
Unscheduled Students	[p. 585]	Edit	Edit	Edit	None	None	None	None
Unscheduled Teachers	[p. 586]	Edit	Edit	Edit	None	None	None	None
Unsubmitted Attendance	[p. 540]	Delete	Delete	Delete	View	None	None	None
Unsubmitted Attendance by Period	[p. 539]	Delete	Delete	Delete	View	None	None	None
Unsubmitted Attendance by Teacher	[p. 540]	Delete	Delete	Delete	View	None	None	None

Schedule Reports permission

This permission controls the user's ability to schedule PowerSchool SMS to run a report [see p.117].

Dependencies:

* For a user to schedule PowerSchool SMS to run a report, the user's setting for that report's permission [p. 696] must be View, Edit, or Delete.

Settings:

* **Yes**: The user can schedule PowerSchool SMS to run a report.
* **No**: The user is unable to schedule PowerSchool SMS to run a report. On the Report Options page, PowerSchool SMS does not display Schedule Options.

Default settings by base role [p. 246]:

* District Administrator: **Yes**
* School Administrator: **Yes**
* School Counselor: **Yes**
* School Secretary: **Yes**
* Teacher: **Yes**
* School Health Professional: **Yes**
* District Health Professional: **Yes**

School Setup permissions

Permissions in this category pertain to setting up a school [p. 169]. These permissions include:

* *Alert Setup permission* [p. 703]
* *Assign Classes permission* [p. 704]

- *Assign Course Requests permission* [p. 705]
- *Attendance Calc Sample Method permission* [p. 706]
- *Attendance Code Setup List permission* [p. 706]
- *Attendance Exception Rules permission* [p. 707]
- *Attendance Rules for Credit Calculations (School) permission* [p. 708]
- *Award Setup permission* [p. 709]
- *Calendar Day Exceptions permission* [p. 709]
- *Change Planning Schedule permission* [p. 710]
- *Class Ranks permission* [p. 710]
- *Classes permission* [p. 711]
- *Clear Attendance permission* [p. 711]
- *Course Grade Items permission* [p. 712]
- *Daily Attendance Calculation Method permission* [p. 713]
- *Daily Attendance Occurrence Method permission* [p. 713]
- *Day Type Setup List permission* [p. 714]
- *Define Constraints - School permission* [p. 714]
- *Define Progress Report Periods permission* [p. 715]
- *Define Report Card Periods permission* [p. 716]
- *Define School Calendar permission* [p. 717]
- *GPA Definitions permission* [p. 718]
- *Grade Calculations permission* [p. 719]
- *Grade Items permission* [p. 719]
- *Grade Level Setup List permission* [p. 720]
- *Grading Period Sets permission* [p. 720]
- *Grading Tables permission* [p. 721]
- *Homerooms permission* [p. 722]
- *Honor Rolls Definitions permission* [p. 722]
- *Online course request setup* [p. 723]
- *Override Constraints permission* [p. 724]
- *Purge Audit Log permission* [p. 724]
- *Room Schedule* [p. 573]
- *Resource Services permission* [p. 726]
- *Secondary Scheduling Setup permission* [p. 726]
- *Secondary Scheduling Structure Setup permission* [p. 727]
- *Standard Comments permission* [p. 728]
- *Subject Framework/Course Catalog permission* [p. 729]
- *Subject Scheduling permission* [p. 730]
- *View Audit Log permission* [p. 731]

Alert Setup permission

This permission controls the user's ability to adjust alerts for school staff see *Alert definitions* [p. 35].

Dependencies:

- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:
- **Delete**: The user can adjust alerts for school staff.
- **Edit**: The same as Delete.
- **View**: The user is unable to adjust alerts for school staff. On the School Setup page, PowerSchool SMS does not display the Alerts link.
- **None**: The same as View.

Default settings by base role [p. 246]:
- District Administrator: **View**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **View**
- District Health Professional: **None**

Assign Classes permission

This permission controls the user's ability to assign classes to a student [p. 280].

To assign a class to a student:
1 Conduct a student search [p. 37].
2 Select one or more students.
3 In the **Actions** menu click **Assign > Classes**.

Or
1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.
2 In the control bar, click **Schedule**. The Student Schedule page appears.
3 Click **Add Class**.

Dependencies
- This permission applies only to a user whose role's scope is at the school level [p. 240].
- To assign classes to a student, the setting for both this permission and the *Edit Student Schedules permission* [p. 776] must be Yes.
- If the setting for the *Edit Student Schedules permission* [p. 776] is Yes and this permission is No, the user can assign classes to a student only using the Student Schedule page [p. 71].

Settings:
- **Yes**: The user can assign classes to a student.
- **No**: The user is unable to assign classes to a student.

Default settings by base role [p. 246]:
- District Administrator: **No**

- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Assign Course Requests permission

This permission controls the user's ability to make a course request for a student [p. 347].

To make a course request for a student:
1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.
2 In the control bar, click **Schedule**. The Student Schedule page appears.
3 Under the **Course Requests** tab, find and add courses to the list of requests.

To make a course request for one or more students:
1 On the task bar under **Admin**, click **Scheduling**. The Scheduling page appears.
2 Under **Step 6**, click **Load Students**. The Load Students page appears.
3 Conduct a student search [p. 37] and select one or more students.
4 In the **Actions** menu click **Assign > Course Requests**. The Assign Requests page appears.

Dependencies
- This permission applies only to a user whose role's scope is at the school level [p. 240].
- To assign classes to a student, the setting for both this permission and the *Edit Student Schedules permission* [p. 776] must be Yes.
- If the setting for the *Edit Student Schedules permission* [p. 776] is Yes and this permission is No, the user can request a course for a student only using the Student Schedule page [p. 71].

Settings:
- **Yes**: The user can make a course request for a student.
- **No**: The user is unable to make a course request for a student.

Default settings by base role [p. 246]:
- District Administrator: **No**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**

- District Health Professional: **No**

Attendance Calc Sample Method permission

This permission controls the user's ability to adjust the Sample Method rules that enable PowerSchool SMS to calculate each student's daily attendance code each day [p. 191].

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].
- This permission applies only at a school where PowerSchool SMS uses the Sample Method see *Choosing a daily attendance code calculation method* [p. 190] to calculate daily attendance codes.
- For this permission to be effective, the setting for the *Daily Attendance Calculation Method permission* [p. 713] must be Edit or Delete.

Settings:

- **Delete**: The user can add, edit, and delete attendance code rules for the Sample Method.
- **Edit**: The user can add and edit attendance code rules for the Sample Method but cannot delete them.
- **View**: The user view but not change attendance code rules for the Sample Method.
- **None**: The user is unable to view attendance code rules for the Sample Method.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **View**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Attendance Code Setup List permission

This permission controls the user's ability to set up and change attendance codes used for taking attendance at a school see *Setting up school attendance codes* [p. 185].

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:

- **Delete**: The user can add, edit, and delete a school's attendance codes.

- **Edit**: The user can add and edit a school's attendance codes but cannot delete them.
- **View**: The user view but not change a school's attendance codes.
- **None**: The user is unable to edit a school's attendance codes.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **View**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Attendance Exception Rules permission

This permission controls the user's ability to set up how PowerSchool SMS alerts a school's users to attendance exceptions (an unusual attendance pattern that merits appropriate action) see *Setting up attendance exception rules* [p. 195].

Dependencies
- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:
- **Delete**: The user can add, edit, and delete attendance exception rules for a school.
- **Edit**: The user can add and edit, but not delete, attendance exception rules for a school.
- **View**: The user view but not change attendance exception rules for a school.
- **None**: The user is unable to edit attendance exception rules for a school.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **Delete**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Attendance General Settings permission

This permission controls the user's ability to specify a school's general settings for scheduling, attendance, and student behavior see *Attendance*

setup [p. 181]. The user works with these settings on the General Settings page.

To work with a school's general settings:

1   In the **Admin** menu, click **School Setup**. The School Setup page appears.
2   Under **School**, click **General Settings**. The General Settings page appears.

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:

- **Yes**: The user can specify a school's general settings.
- **No**: The user can view but not change a school's general settings.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Attendance Rules for Credit Calculations (School) permission

This permission controls the user's ability to set rules that enable PowerSchool SMS to deny credit to a student whose attendance record is substandard see *Setting up an attendance rule for credit calculations* [p. 197]. The user works with such rules on Attendance Rules for Credit Calculations page.

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:

- **Delete**: The user can set rules that enable PowerSchool SMS to deny credit to a student whose attendance record is substandard.
- **Edit**: Same as Delete.
- **View**: The user can view but not change the rules.
- **None**: The user is unable to view or work with the rules.

Default settings by base role [p. 246]:

- District Administrator: **View**
- School Administrator: **View**
- School Counselor: **View**

- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **None**
- District Health Professional: **None**

Award Setup permission

This permission controls the user's ability to set up an award for granting to a school's students [p. 214]. The user's ability to determine which students receive an award is controlled by the *Awards permission* [p. 769].

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:

- **Delete**: The user can add, edit, or delete awards.
- **Edit**: The user can add, or edit, but not delete, awards.
- **View**: The user view but not change awards.
- **None**: The user is unable to view or work with awards.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **Delete**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Calendar Day Exceptions permission

This permission controls the user's ability to assign an exception day to a date in the school calendar [p. 178], such as holidays or professional development day.

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:

- **Delete**: The user can add, edit, or delete exception day assignments.
- **Edit**: The user can add, or edit, but not delete, exception day assignments.
- **View**: The user view but not change exception day assignments.
- **None**: The user is unable to view or work with exception day assignments.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **Delete**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Change Planning Schedule permission

This permission controls the user's ability to switch the planning schedule in the Planning Calendar and (in a secondary school) work with one or more planning schedules [*Set up a planning schedule* p.303]. Caution: Creating and switching planning schedules affects student course requests [p. 108]

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].
- This permission applies only to a school's Planning Calendar (only one schedule is permitted in the Active Calendar).

Settings:

- **Yes**: The user change the planning schedule in a school's Planning Calendar.
- **No**: The user can view but not change a school's planning schedules.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Class Ranks permission

This permission controls the user's ability to work with the calculations that determine class ranks. For detailed information on student class ranking, refer to the *PowerSchool SMS Grading Setup Guide*. Note: The calculation of class ranks is a task associated with year-end [p. 454].

To work with a class rank calculation:
1 In the **Admin** menu, click **Grading**. The Grading page appears.
2 Under **Step 5**, click **Set Up Class Ranks**. The Class Ranks page appears.
3 In the **Class Rank Name** column, click a class rank definition. The Class Rank page appears.
   - Or in the **Actions** menu, select **Add Class Rank Definition**.

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:
- **Delete**: The user can add, edit, or delete class rank definitions.
- **Edit**: The user can add, or edit, but not delete, class rank definitions.
- **View**: The user view but not change class rank definitions.
- **None**: The user is unable to set up class rank definitions.

Default settings by base role [p. 246]:
- District Administrator: **None**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Classes permission

This permission controls the user's access to pages where he or she can work with classes; for elementary scheduling tasks [p. 282] this is the Class Setup page, for secondary scheduling [p. 285], the Master Schedule page..

Dependencies
- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:
- **Delete**: The user can add, edit, or delete classes.
- **Edit**: The user is unable to add, edit, or delete classes.
- **View**: Same as Edit
- **None**: Same as Edit

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **Edit**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Clear Attendance permission

This permission controls the user's ability to clear attendance records [p. 161] and submit flags [p. 162].

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:

- **Yes**: The user can clear attendance records and submit flags.
- **No**: The user is unable to clear attendance records and submit flags. The user is unable to view submit flags.

Default settings by base role [p. 246]:

- District Administrator: **No**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Note: No base role has this permission by default because in practice clearing attendance records or submit flags is a one-off task taken on only in unusual circumstances.

Course Grade Items permission

This permission controls the user's ability to assign course grade item properties (such as grading periods and grading table) to a course and to specify if the course is awarded credit and used in cumulative GPAs. For detailed information, refer to the *PowerSchool SMS Grading Setup Guide*.

To work with course grade items:
1 In the **Admin** menu, click **Grading**. The Grading page appears.
2 Under **Step 4**, click **Courses**.
3 In the **Name** column, click a course. The **Course Detail** page appears.
4 In the control bar, click **Course Grading**.

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].
- This permission applies only to a school that employs secondary scheduling [p. 285] (schools using elementary scheduling do not use course grade items).

Settings:

- **Delete**: The user change a grading period set.
- **Edit**: Same as Delete
- **View**: Same as Delete
- **None**: The user is unable change a grading period set.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Delete**

- School Counselor: **Delete**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Daily Attendance Calculation Method permission

This permission controls the user's ability to configure the rules governing the Sample Method of daily attendance calculation [p. 190] where it is employed at a school.

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].
- This permission applies only to a school where the Sample Method is employed [p. 190].

Settings:

- **Delete**: The user can configure the rules governing the Sample Method.
- **Edit**: Same as Delete
- **View**: Same as Delete
- **None**: The user is unable configure the rules governing the Sample Method.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Daily Attendance Occurrence Method permission

This permission controls the user's ability to configure the rules governing the Occurrence Method of daily attendance code calculation [p. 190] where it is employed at a school.

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].
- This permission applies only to a school where the Occurrence Method is employed [p. 190].

Settings:

- **Delete**: The user can configure the rules governing the Occurrence Method.
- **Edit**: Same as Delete
- **View**: Same as Delete
- **None**: The user is unable configure the rules governing the Occurrence Method.

Default settings by base role [p. 246]:
- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Day Type Setup List permission

This permission controls the user's ability to work with a school's day types [p. 177].

Dependencies
- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:
- **Yes**: The user can add, edit, or delete day types.
- **No**: The user is unable to view or work with day types.

Default settings by base role [p. 246]:
- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Define Constraints - School permission

This permission controls the user's ability to work with constraints when scheduling students. For detailed information, refer to the *PowerSchool SMS Scheduling Guide*.

To work with scheduling constraints:[SA][1]
1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2 Under **Step 3**, click <u>Constraints</u>.

---

[1]You can do this if your role is School Administrator.

- Or under **Step 3** in the Planning Calendar.

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:

- **Delete**: The user can add, edit, apply, and delete scheduling constraints.
- **Edit**: The user can add, edit, and apply scheduling constraints.
- **View**: The user can edit and apply scheduling constraints.
- **None**: The user is unable to view or work with scheduling constraints.

Default settings by base role [p. 246]:

- District Administrator: **View**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Define Progress Report Periods permission

This permission controls the user's ability to add or edit grading periods for progress reports. For more information, refer to the *PowerSchool SMS Grading Setup Guide*. For the corresponding permission for report cards, refer to *Define Report Card Periods permission* [p. 716].

To work with grading periods:[SA][1]
1 In the **Admin** menu, click **Grading**. The Grading page appears.
2 Click **Grading Periods**. The Grading Periods page appears.

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].
- This permission is effective only when the setting for *Grading Period Sets permission* [p. 720] is Edit or Delete.
- This permission is ineffective if the setting for the *Grading Period Sets permission* [p. 720] is None or View.
- If the setting for this permission and the *Define Report Card Periods permission* [p. 716] is No, the user cannot add a new report card grading period.

Settings:

- **Yes**: The user can add or edit progress report grading periods.

---

[1]You can do this if your role is School Administrator.

- **No**: The user is unable to add or edit progress report grading periods.

Default settings by base role [p. 246]:
- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Define Report Card Periods permission

This permission controls the user's ability to add or edit grading periods for report cards. For more information, refer to the *PowerSchool SMS Grading Setup Guide*. For the corresponding permission for progress reports, refer to *Define Progress Report Periods permission* [p. 715].

To work with grading periods:[SA[1]]
1 In the **Admin** menu, click **Grading**. The Grading page appears.
2 Click **Grading Periods**. The Grading Periods page appears.

Dependencies
- This permission applies only to a user whose role's scope is at the school level [p. 240].
- This permission is effective only when the setting for *Grading Period Sets permission* [p. 720] is Edit or Delete.
- This permission is ineffective if the setting for the *Grading Period Sets permission* [p. 720] is None or View.
- If the setting for this permission and the *Define Report Card Periods permission* [p. 716] is No, the user cannot add a new report card grading period.

Settings:
- **Yes**: The user can add or edit report card grading periods.
- **No**: The user is unable to add or edit report card grading periods.

Default settings by base role [p. 246]:
- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

---

[1]You can do this if your role is School Administrator.

Define School Calendar permission

This permission controls the user's ability to set up school calendars [p. 169] and to switch between the Active and Planning Calendars [p. 171].

Dependencies:

- This permission applies only to a user whose role's scope is at the school level [p. 240].
- This permission does not apply to a user based on the District Administrator or District Health Professional base role [p. 246] (these roles do not have access to the School Setup page). These roles work instead with a District Calendar, which is controlled by the *Define District Calendar permission* [p. 645].
- This permission does not affect the user's ability to register [p. 138] or enroll [p. 141] students in the Planning Calendar. (To register or enroll a student in the Planning Calendar, use the Active Calendar and specify a future date within the date range of the Planning Calendar.)

Settings:

- **Yes**: The user can add, edit, and delete school calendars as well as switch between Active and Planning Calendars. A user based on the School Secretary or Teacher base role [p. 246] can view but not change school calendars, nor can they switch calendars.
- **No**: The user is able to use a school calendar but not change it or switch between Active and Planning Calendars.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Delete Teacher Assignment permission

This permission controls the user's ability to delete teacher class assignments [p. 329].

Dependencies:

- This permission applies only to a user whose role's scope is at the school level [p. 240].
- This permission does not apply to a user based on the District Administrator or District Health Professional base role [p. 246]; however, due to a restriction in Chancery SMS, the District Administrator default permission is "Yes", even though this role does not have access to students' scheduling pages.

Settings:

- **Yes**: The user can delete teacher assignments from classes.
- **No**: The user cannot delete teacher assignments from classes.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

GPA Definitions permission

This permission controls the user's ability to set up grade point average definitions for a school. For more information, refer to the *PowerSchool SMS Grading Setup Guide*.

To work with a school's grading point average definitions: [SA[1]]

1   In the **Admin** menu, click **Grading**. The Grading page appears.
2   Click **Grading Point Averages**. The Grading Point Averages page appears.

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].
- This permission applies only to a school that employs secondary scheduling [p. 285].

Settings:

- **Delete**: The user can add, edit, and delete grade point averages.
- **Edit**: The user can add and edit grade point averages.
- **View**: The user can view but not change grade point averages.
- **None**: The user is unable to view or work with grade point averages.

Default settings by base role [p. 246]:

- District Administrator: **None**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **None**
- District Health Professional: **None**

---

[1]You can do this if your role is School Administrator.

Grade Calculations permission

This permission controls the user's ability to add and edit grade calculation formulae. For more information, refer to the *PowerSchool SMS Grading Setup Guide*.

To work with a school's grade calculation formulae:[SA[1]]
1 In the **Admin** menu, click **Grading**. The Grading page appears.
2 Click **Calculated Grades**. The Grade Calculations page appears.

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].
- This permission applies only to a school that employs secondary scheduling [p. 285].
- This permission does not affect the user's ability to run grade calculations. This is controlled by the *Run Grade, Credit & GPA Calculations permission* [p. 679].

Settings:

- **Delete**: The user can add, edit, and delete a school's grade calculation formulae.
- **Edit**: The user can add and edit grade calculation formulae.
- **View**: The user can view but not change grade calculation formulae.
- **None**: The user is unable to view or work with grade calculation formulae.

Default settings by base role [p. 246]:

- District Administrator: **None**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **Delete**
- District Health Professional: **None**

Grade Items permission

This permission has no effect. Refer to the *Grading Period Sets permission* [p. 720].

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**

---

[1]You can do this if your role is School Administrator.

- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Grade Level Setup List permission

This permission controls the user's ability to view and select the grades used at a school [p. 199].

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:

- **Edit**: The user can select the grade levels used at a school.
- **View**: The user can view but not change the grade levels used at a school.
- **None**: The user is unable to view or select the grade levels used at a school.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Grading Period Sets permission

This permission controls the user's ability to define grading period sets, which specify the date ranges for report cards and progress reports, and to set the grading items for a school. For more information, refer to the *PowerSchool SMS Grading Setup Guide*.

To work with a school's grading period sets:[SA[1]]
In the **Admin** menu, click **Grading Periods**. The Grading Periods page appears.
- Or, In the **Admin** menu, click **School Setup**. On the School Setup page, click **Grading Periods**.

To work with a school's grade items:[SA[2]]
In the **Admin** menu, click **Grade Items**. The Grading Periods page appears.

Dependencies

---

[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.

- This permission applies only to a user whose role's scope is at the school level [p. 240].
- At a school that employs secondary scheduling [p. 285], this permission also control's the user's ability to define grade items, that is, the items for which grades are collected.
- This permission does not affect the grading periods. The user's ability to work with grading periods is controlled by the *Define Constraints - School permission* [p. 714] and the *Define Report Card Periods permission* [p. 716].

Settings:

- **Delete**: The user can add, edit, and delete a school's grading period sets and grade items.
- **Edit**: The user can add or edit a school's grading period sets and add, edit, and delete a school's grade items.
- **View**: The user can view a school's grading period sets and add, edit, and delete a school's grade items.
- **None**: The user is unable to view or work with a school's grading period sets and grade items.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **Edit**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Grading Tables permission

This permission controls the user's ability to create tables that define the range of possible grades and their values. For more information, refer to the *PowerSchool SMS Grading Setup Guide*.

To work with a school's grading tables:[SA[1]]

1 In the **Admin** menu, click **Grading**. The Grading page appears.
2 Click **Calculated Tables**. The Grade Table page appears.

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:

- **Delete**: The user can add, edit, and delete a school's grading tables and change the order in which they appear in the legend on a student's report card.

---

[1]You can do this if your role is School Administrator.

- **Edit**: The user can add and edit a school's grading tables and change the order in which they appear in the legend on a student's report card.
- **View**: The user can view a school's grading tables.
- **None**: The user is unable to view or work with a school's grading tables.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Homerooms permission

This permission controls the user's ability to set up a school's homerooms [p. 202].

Dependencies
- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:
- **Delete**: The user can add, edit, and delete a school's homerooms.
- **Edit**: The user can add and edit a school's homerooms.
- **View**: The user is unable to view or work with a school's homerooms.
- **None**: The user is unable to view or work with a school's homerooms.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **Edit**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Honor Rolls Definitions permission

This permission controls the user's ability to set criteria for a school's honor rolls. For more information, refer to the *PowerSchool SMS Grading Setup Guide*.

To set criteria for a school's honor roll:[SA[1]]

1 In the **Admin** menu, click **Grading**. The Grading page appears.

2 Click <u>Set Up Honor Rolls</u>. The Honor Roll Definitions page appears.

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].
- This permission applies only to a school that employs secondary scheduling [p. 285].
- This permission does not affect the user's ability to calculate, manage, or override honor rolls. This is controlled by the *Honor Rolls permission* [p. 675] and the *Override Honor Rolls permission* [p. 782].

Settings:

- **Delete**: The user can add, edit, and delete a school's honor roll definitions.
- **Edit**: The user can add and edit a school's honor roll definitions.
- **View**: The user is able to view a school's honor roll definitions. While the user can change eligibility for an honor roll, PowerSchool SMS does not save that change.
- **None**: The user is unable to view or work with a school's honor roll definitions.

Default settings by base role [p. 246]:

- District Administrator: **None**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Online course request setup

This permission controls the user's ability to configure online course requests [p. 231], that is, course requests submitted by a student or parent through ParentCONNECTxp [p. 167].

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:

- **Edit**: The user is able to view and change online course request settings for a school.

---

[1]You can do this if your role is School Administrator.

- **View**: The user is able to view online course request settings for a school.
- **None**: The user is unable to view or configure online course request settings for a school.

Default settings by base role [p. 246]:
- District Administrator: **None**
- School Administrator: **None**
- School Counselor: **None**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Override Constraints permission

This permission controls the user's ability to, when working with a student's schedule, to add a student to a class or homeroom where that student does not meet a constraint [see *Configure student loading rules* p.310], that is, the user can override a constraint that is indicated as "must contain".

Dependencies
- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:
- **Yes**: The user is able to add a student to a class or homeroom where that student does not meet a constraint.
- **No**: The user is unable to add a student to a class or homeroom where that student does not meet a constraint. **Note**: This setting also enables custom fields [p. 509] to work with constraints.

Default settings by base role [p. 246]:
- District Administrator: **No**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Purge Audit Log permission

This permission controls the user's ability to clear the Database Audit Log [*Reviewing information-changing activity* p.163].

Dependencies
- This permission applies only when the user's setting for the *View Audit Log permission* [p. 731] is Yes.

Settings:

- **Yes**: The user is able to clear the Database Audit Log.
- **No**: The user is unable to clear the Database Audit Log.

Default settings by base role [p. 246]:
- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Report Card Setup permission

This permission controls the user's ability to set up a school's report cards and progress reports. For more information, refer to the *Chancery SMS Grading Setup Guide*.

To set up a school's report cards:[SA ¹]
1 In the **Admin** menu, click **Grading**. The Grading page appears.
2 Click **Report Card and Progress Report Setup**. The Report Card Setup page appears.
   - At a school that employs elementary scheduling, also click **Common Elements**. (Report card setup also involves specifying common elements, such as signatures.

Dependencies
- This permission applies only to a user whose role's scope is at the school level [p. 240].
- This permission applies to a school that employs either elementary or secondary scheduling [p. 285].

Settings:
- **Delete**: The user can add, edit, and delete a school's report cards and progress reports. At a school that employs elementary scheduling, the user can add, edit, and delete a school's common elements for report cards and progress reports.
- **Edit**: Same as Delete
- **View**: Same as Delete
- **None**: The user is unable to view or work with a school's report cards and progress reports.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **View**
- Teacher: **None**

---

¹You can do this if your role is School Administrator.

- School Health Professional: **None**
- District Health Professional: **None**

Resource Services permission

This permission controls the user's ability to set up a school's resource services. To control the user's ability to assign resources to students, refer to the *Student School Specific permission* [p. 795].

To set up a school's resources services:[SA[1]]

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2 Click **Resource Services**. The Resource Services page appears.

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:

- **Delete**: The user can add, edit, and delete a school's resource services.
- **Edit**: The user can add and edit a school's resource services.
- **View**: The user can view but not change a school's resource services.
- **None**: The user is unable to view or work with a school's resource services.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Secondary Scheduling Setup permission

This permission controls the user's ability to set up schedules at a school by restricting the user's access to scheduling-related PowerSchool SMS pages. For information about scheduling, refer to the *Chancery SMS Scheduling Guide*.

At a school that employs secondary scheduling [p. 285], this permission controls the user's access to the following pages:

- Room Setup
- Staff Setup
- Course Setup

---

[1]You can do this if your role is School Administrator.

- Course Loading Rules
- Teams Loading Rules
- Course Offerings & Meeting Patterns
- Class Scheduling Options
- Course Request Tally
- Teacher Allocations
- Master Schedule
- Student Loader Options
- Load Students

At a school that employs elementary scheduling [p. 282], this permission controls the user's access to the following pages:

- Room Setup
- Class Setup

To set up a school's schedules:[SA[1]]

In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].
- This permission may be affected by: *Student School Specific permission* [p. 795], *Resource Services permission* [p. 726], *Secondary Scheduling Structure Setup permission* [p. 727].

Settings:

- **Yes**: The user has access to the pages necessary to set up schedules at a school.
- **No**: The user does not have access to the pages necessary to set up schedules at a school (PowerSchool SMS disables the links to those pages).

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Secondary Scheduling Structure Setup permission

This permission controls the user's ability to set up a school's scheduling [p. 356] structure by restricting the user's access to scheduling-related

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[1]You can do this if your role is School Administrator.

PowerSchool SMS pages. For more information, refer to the *Chancery SMS Scheduling Guide*.

Specifically, this permission controls the user's access to the following pages:

- Scheduling Groups
- Scheduling Term Sets (secondary only)
- Day Pattern
- Bell Schedules
- Meeting Patterns
- Constraints

To set up a school's scheduling structure:[SA[1]]

In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:

- **Yes**: The user has access to the pages necessary to set up a school's scheduling structure.
- **No**: The user does not have access to the pages necessary to set up a school's scheduling structure (PowerSchool SMS disables the links to those pages).

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Standard Comments permission

This permission controls the user's ability to work with the standard comments and comment categories in use at a school for report cards and progress reports. For more information, refer to the *Chancery SMS Grading Setup Guide*.

To set up a school's scheduling structure:[SA[2]]

1 In the **Admin** menu, click **Grading**. The Grading page appears.
2 Click **Standard Comments**.
   - Or click **Standard Comment Categories**.

Dependencies

---

[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.

- This permission applies only to a user whose role's scope is at the school level [p. 246].

Settings:

- **Delete**: The user can add, edit, and delete a school's standard comments and comment categories.
- **Edit**: The user can add and edit a school's standard comments and comment categories.
- **View**: The user can view but not change a school's standard comments and comment categories.
- **None**: The user is unable to view or work with a school's standard comments and comment categories.

Default settings by base role [p. 246]:

- District Administrator: **View**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **None**
- District Health Professional: **None**

Subject Framework/Course Catalog permission

This permission controls the user's ability to work with subjects at a school that employs elementary scheduling, such as editing a subject's scheduling parameters. At a school that employs secondary scheduling [p. 285], this permission controls the user's ability to work with courses in the course catalog, such as selecting a department for a course or defining preferred room types or rooms for a course. For more information, refer to the *Chancery SMS Scheduling Guide*.

To work with an elementary school's subjects:[SA1]
1 In the **Admin** menu, click **School Setup**. The School Setup page appears.
2 Click <u>Subject Framework</u>.

Or
3 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
4 Click <u>Subject Scheduling</u>.

To work with a secondary school's courses:[SA2]
1 In the **Admin** menu, click **School Setup**. The School Setup page appears.
2 Click <u>Courses</u>.

---

[1]You can do this if your role is School Administrator.
[2]You can do this if your role is School Administrator.

Or

3   In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

4   Click Course Setup.

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 246].
- For the district-level equivalent of this permission, refer to the permission *Course Catalog permission* [p. 639].

Settings:

- **Delete**: The user at a secondary school can edit course information. The user at an elementary school can edit the subject framework.
- **Edit**: Same as Delete
- **View**: The user at a secondary school can view but not change course information. The user at an elementary school can view but not change the subject framework.
- **None**: The user is unable to view or work with a school's course catalog or subject framework.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Subject Scheduling permission

At a school that employs elementary scheduling [p. 285], this permission controls the user's ability to specify the subjects that can be scheduled and to set scheduling options for those subjects. For more information, refer to the *Chancery SMS Scheduling Guide*.

To schedule subjects at an elementary school:[SA[1]]

1   In the **Admin** menu, click **Scheduling**. The Scheduling page appears.

2   Click **Subject Scheduling**.

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 246].
- This permission applies only at a school that employs elementary scheduling [p. 282].

---

[1]You can do this if your role is School Administrator.

- To control the user's ability to edit class schedules for a subject, refer to the *Classes permission* [p. 711]

Settings:

- **Edit**: The user can edit subject schedules and a subject's scheduling properties.
- **View**: The user can view but not change subject schedules and a subject's scheduling properties.
- **None**: The user is unable to view or work with subject schedules and a subject's scheduling properties.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **Edit**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

View Audit Log permission

This permission controls the user's ability to review the Database Audit Log [*Reviewing information-changing activity* p.163]. For permission to clear the Database Audit Log, refer to the *Purge Audit Log permission* [p. 724].

Dependencies: None

Settings:

- **Yes**: The user is able to view the Database Audit Log.
- **No**: The user is unable to view the Database Audit Log.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

School Specific Pages Only permissions

These permissions include:

- *Access to All Students permission* [p. 732]

Access to All Students permission

This permission controls the user's ability to find [p. 37] and work with the records of any student [p. 54] that falls within the user's role's scope [p. 240], that is, the records of students other than those for whom the user's role normally has responsibility. A user whose role's scope is at the school level can work with the records of any student in the school; a user whose role's scope is at the district level can work with the records of any student in the district. For example, when this permission's settings is Yes, a school counselor could work with any student at his or her school, not just those assigned to him or her; when this permission's setting is No, a teacher could only work with a student in one of his or her class.

Dependencies: None

Settings:

- **Yes**: The user can find and work with any student that falls within the user's role's scope. On the Quick Search page, PowerSchool SMS displays the **All Students** link.
- **No**: The user can find and work with the records of only those student for which he or she is responsible. If the user is not responsible for any students, on the control bar PowerSchool SMS does not display the SEARCH section [p. 37]. If the user is not responsible for any students and that user's role's base role [p. 246] is something other than Teacher, PowerSchool SMS displays a "no access" message in place of the home page (this is because the Quick Search page is the home page for all roles based on the base roles of Administrator, School Administrator, School Counselor, and School Secretary).

Default settings by base role [p. 246]:

- District Administrator: **No**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **Yes**
- Teacher: **No**
- School Health Professional: **Yes**
- District Health Professional: **Yes**

Schools permissions

Permissions in this category pertain to setting up schools in the district see *District setup* [p. 251] see *District setup* [p. 251]. The permissions include:

- *Add School permission* [p. 733]
- *Data Mapping permission* [p. 733]
- *Delete Schools permission* [p. 734]
- *Purge School Data permission* [p. 734]
- *School Basics, Contact and Comment permission* [p. 736]

Add School permission

This permission controls the user's ability to add one or more schools to the district see *District setup* [p. 251].

To add a school to the district:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Schools**, click <u>Schools</u>. The School Info page appears.
3 In the **Actions** menu, click **Add...**. The Add School page appears.

Dependencies:

- For this permission's Yes setting to have an effect, the setting for the *School Basics, Contact and Comment permission* [p. 736] must be Edit.

Settings:

- **Yes**: The user can add a school to the district.
- **No**: The user is unable to add a school to the district.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Data Mapping permission

This permission controls the user's ability to have PowerSchool SMS map data for a specific school.

To have PowerSchool SMS map data for a school:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Tools**, click <u>Data Mapping</u>. The Data Mapping page appears.
3 Select one or more schools.
4 In the **Actions** menu, click **Map Data**.
   - Or click **Map Data**.

Dependencies: None

Settings:

- **Yes**: The user can have PowerSchool SMS map data for a schools
- **No**: The user is unable to map data. On the District Setup page, PowerSchool SMS does not display the Data Mapping link.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Delete Schools permission

This permission controls the user's ability to delete a school from the district see *District setup* [p. 251].

To delete a school from the district:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Schools**, click <u>Schools</u>. The School Info page appears.
3 Select one or more schools.
4 In the **Actions** menu, click **Delete....** The Delete School page appears.

Dependencies:

- For this permission's Yes setting to have an effect, the setting for the *School Basics, Contact and Comment permission* [p. 736] must be View or Edit.

Settings:

- **Yes**: The user can delete a school.
- **No**: The user cannot delete a school.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Purge School Data permission

This permission controls the user's ability to purge a school and its information from the system.

To purge a school from the system:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Schools**, click <u>Schools</u>. The School Info page appears.
3 Select one or more schools.
4 In the **Actions** menu, click **Purge....** The Purge School page appears.

Dependencies:

- For this permission's Yes setting to have an effect, the setting for the *School Basics, Contact and Comment permission* [p. 736] must be View or Edit.

Settings:

- **Yes**: The user can purge a school.
- **No**: The user cannot purge a school.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Schedule Data Mapping permission

This permission controls the user's ability to schedule a specific or recurring time for PowerSchool SMS to map data for all district schools at once.

To schedule data mapping:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Tools**, click <u>Schedule Data Mapping</u>. The Schedule Data Mapping page appears.

Dependencies: None

Settings:

- **Yes**: The user can schedule data mapping.
- **No**: The user cannot schedule data mapping. On the District Setup page, PowerSchool SMS does not display the Schedule Data Mapping link.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

School Basics, Contact and Comment permission

This permission controls the user's ability to work with information about schools.

To work with information on schools:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.

2 Under **Schools**, click <u>Schools</u>. The School Info page appears.

Dependencies:

* This permission's setting affects three other permissions: *Add School permission* [p. 733], *Purge School Data permission* [p. 734], and *Delete Schools permission* [p. 734].

Settings:

* **Edit**: The user can work with basic information about a school.
* **View**: The user can view but not change basic information about a school.
* **None**: The user does not have access to information about a school. On the District Setup page, PowerSchool SMS displays the Schools link, however if the user click it PowerSchool SMS displays a "no access" message.

Default settings by base role [p. 246]:

* District Administrator: **Edit**
* School Administrator: **Edit**
* School Counselor: **Edit**
* School Secretary: **None**
* Teacher: **None**
* School Health Professional: **View**
* District Health Professional: **View**

Setup Lists permissions

These permissions include:

* *Diagnosis permission* [p. 736]
* *List Defaults permission* [p. 737]
* *Setup Lists permissions* [p. 736]
* *Setup List Groups permission* [p. 739]
* *Treatment permission* [p. 739]
* *<Setup List> permission* [p. 740]

Diagnosis permission

This permission controls the ability to add, edit, and delete items from the Diagnosis setup list pair, which appears on the Diagnosis Search page.

To work with the setup list pair:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click <u>Setup List Pairs</u>. The Setup List Pair page appears.
3 In the **Name** column, click "Diagnosis". The Diagnosis Search page appears.

Dependencies: None

Settings:

- **None**: The user can view the Diagnosis setup list pair. The user can view all fields but cannot change them or add new items.
- **View**: Same as None.
- **Edit**: Full access to the Diagnosis setup list pair. The user can add, edit, and delete items.
- **Delete**: Same as Edit.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **Edit**
- District Health Professional: **Delete**

List Defaults permission

This permission controls access to the List Default field on the List Settings page. The List Default field controls the items that PowerSchool SMS displays for the setup list being edited and the group to which the setup list belongs.

To view the List Default Field:
1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click <u>Setup Lists</u> . The Setup Lists page appears.
3 In the **Name** column, click a setup list's name.
4 In the control bar, click **List Settings**.

Dependencies:

- If the setting for this permission and that of the *<Setup List> permission* [p. 740] is None, the List Settings page is not available.

Settings:

- **None**: The user does not have access to the default item for each setup list. The List Default field does not display on the List Settings page.

- **View**: The user can view but not change the default item for each setup list. PowerSchool SMS displays the List Default field on the List Settings page, but the user cannot edit it.
- **Edit**: The user has access to the default item for each setup list. PowerSchool SMS displays the List Default field on the List Settings page and the user can edit it.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Office Visit Type permission

This permission controls the ability to add, edit, and delete items from the Office Visit Type setup list pair.

To work with the Office Visit Type setup list pair:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click **Setup List Pairs**. The Setup List Pair page appears.
3 In the **Name** column, click "Office Visit Type". The Office Visit Type Search page appears.

Dependencies: None

Settings:

- **Edit**: The user has access to the Office Visit Type setup list pair—the user can add, edit, and delete items.
- **Delete**: Same as Edit.
- **None**: The user can view but not change the Office Visit Type setup list pair.
- **View**: Same as None.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **Edit**
- District Health Professional: **Delete**

Setup List Groups permission

This permission controls the user's ability to define groupings of setup lists. To enable the user to change the group to which a setup list belongs refer to the *<Setup List> permission* [p. 740].

To work with setup list groupings:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click **Setup Lists...**. The Setup Lists page appears.
3 In the control bar, click **Setup List Groups**. The Setup List Groups page appears.

Dependencies: None

Settings:

- **Delete**: The user can add, edit, or delete setup list groups.
- **Edit**: The user can add or edit setup list groups. The user cannot delete setup list groups.
- **View**: The user can view but not change setup list groups.
- **None**: The user does not have access to setup list groups. PowerSchool SMS does not display the Setup List Groups link in the control bar of the Setup Lists page; thus, the user cannot view the Setup List Groups page.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Treatment permission

This permission controls the ability to add, edit, and delete items from the Treatment setup list pair.

To work with the Treatment setup list pair:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **District**, click **Setup List Pairs**. The Setup List Pair page appears.
3 In the **Name** column, click "Treatment". The Treatment search page appears.

Dependencies: None

Settings:

- **Edit**: The user can add, edit, or delete items in the Treatment setup list pair.
- **Delete**: Same as Edit.
- **None**: The user can view but not change the Treatment setup list pair.
- **View**: Same as None.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **Edit**
- District Health Professional: **Delete**

<Setup List> permission

PowerSchool SMS permissions enable the District Administrator to control access to each setup list separately, including custom setup lists.

To view a setup list:
1   In the **Admin** menu, click **District Setup**. The District Setup page appears.
2   Under **District**, click **Setup Lists...**. The Setup Lists page appears with setup lists displayed in groups.
3   In the **Name** column, click the setup list's name.

Dependencies: None

Settings (may differ slightly for certain setup lists):
- **None**: The user does not have access to the setup list. PowerSchool SMS does not display the setup list on the Setup Lists page.
- **View**: The user can view the setup list. On the Setup Lists page, the user can click the name of the setup list to go to the List Items page. On the List Items page, the user can click the item names to go to the View List Item page, where the fields for the list item are read-only—PowerSchool SMS does not display the Add, Delete, Merge, and Assign buttons.
- **Edit**: The user can add or edit items. On the List Items page, PowerSchool SMS does not display the Delete, Merge, and Assign buttons.
- **Delete**: The user can add, edit, and delete items. On the List Items page, PowerSchool SMS does not display the Merge, and Assign buttons.
- **School Selection**: The user can add, edit, and delete items, and assign items to a school. On the List Items page, PowerSchool SMS does not display the Merge button.

- **Merge**: The user can add, edit, and delete items, assign items to schools, and merge two items into one.

Default settings by base role [p. 246]:

- Table 89 : *Address data setup lists: default permission settings* [p.741].
- Table 90 : *General setup lists: default permission settings* [p.742]
- Table 91 : *Program management setup lists: default permission settings* [p.742]
- Table 92 : *Program/Course data setup lists: default permission settings* [p.745]
- Table 93 : *School/district data setup lists: default permission settings* [p.746]
- Table 94 : *Staff data setup lists: default permission settings* [p.746]
- Table 95 : *Student behavior setup lists: default permission settings* [p.747]
- Table 96 : *Student data setup lists: default permission settings* [p.748]
- Table 97 : *Student health setup lists: default permission settings* [p.748]
- Table 98 : *Test management setup lists: default permission setting* [p.750]
- Table 99 : *Transportation setup lists: default permission settings* [p.750]

Table 89: Address data setup lists: default permission settings

Setup list	District Admin	School Admin	School Coun-selor	School Secretary	Teacher	School Health Pro	District Health Pro
All setup lists in this sub-category	Merge	View	View	None	None	None	None
Contact Data							
Contact Type	Merge	View	View	None	None	View	None
Employer Type	Merge	View	View	None	None	None	None
Relation of Contact to Student	Merge	View	View	None	None	View	None
Title for Contacts	Merge	View	View	None	None	View	None
Legacy Tests							
All Setup Lists in this sub-category	Merge	View	View	None	None	None	None

Table 90: General setup lists: default permission settings

Setup list	District Admin	School Admin	School Coun-selor	School Secretary	Teacher	School Health Pro	District Health Pro
State Attendance Code	Merge	View	View	None	None	None	None
State Day Type Code	Merge	View	View	None	None	None	None
Yes/No	Merge	View	View	None	None	View	Merge

Table 91: Program management setup lists: default permission settings

Setup list	District Admin	School Admin	School Coun-selor	School Secretary	Teacher	School Health Pro	District Health Pro
Academic Enhancement Lottery Determinant	Merge	View	View	View	View	View	Merge
Academic Enhancement Programs	Merge	View	View	View	View	View	Merge
Acceptance Status	Merge	View	View	None	None	View	Merge
Accommodations	Delete	View	View	None	None	View	Delete
Activity	Merge	View	View	None	None	View	Merge
After School Academic Activities	Merge	View	View	View	View	View	Merge
After School Academic Programs	Merge	View	View	View	View	View	Merge
After School Athletics ISP Requirements	Merge	View	View	View	View	View	Merge
After School Athletics Level of Play	Merge	View	View	View	View	View	Merge
After School Athletics Sports	Merge	View	View	View	View	View	Merge
Aide Qualification	Merge	View	View	None	None	View	Merge
Applicant Non-Participation Reason	Merge	View	View	View	View	View	Merge
Approval Status	Merge	View	View	None	None	View	Merge
Certification Type	Merge	View	View	None	None	View	Merge
Citizenship Status	Merge	View	View	None	None	View	Merge
Components	Delete	View	View	None	None	View	Delete
Condition	Merge	View	View	None	None	View	Merge
Contacts Role	Merge	View	View	None	None	View	Merge
Date control	Merge	View	View	None	None	View	Merge
Disability	Merge	View	View	None	None	View	Merge

Setup list	District Admin	School Admin	School Counselor	School Secretary	Teacher	School Health Pro	District Health Pro
Duration	Merge	View	View	None	None	View	Merge
Dwelling Type	Merge	View	View	None	None	View	Merge
ECE After Program Care	Merge	View	View	View	View	View	Merge
ECE Child Lives With	Merge	View	View	View	View	View	Merge
ECE Current Placement	Merge	View	View	View	View	View	Merge
ECE ESIR	Merge	View	View	View	View	View	Merge
ECE Household Annual Income	Merge	View	View	View	View	View	Merge
ECE Language of Instruction	Merge	View	View	View	View	View	Merge
ECE Length of Day	Merge	View	View	View	View	View	Merge
ECE Parent Education Level	Merge	View	View	View	View	View	Merge
ECE Parent Participation	Merge	View	View	View	View	View	Merge
ECE Programs	Merge	View	View	View	View	View	Merge
ELL Bilingual Special Education	Merge	View	View	View	View	View	Merge
ELL Extension Count	Merge	View	View	View	View	View	Merge
ELL Home Language Survey	Merge	View	View	View	View	View	Merge
ELL Program Year	Merge	View	View	View	View	View	Merge
ELL Programs	Merge	View	View	View	View	View	Merge
ELL Service	Merge	View	View	View	View	View	Merge
Employment Type	Merge	View	View	None	None	View	Merge
F&R Meals Certification Types	Merge	View	View	View	View	View	Merge
F&R Meals Durations	Merge	View	View	View	View	View	Merge
F&R Meals Other Benefits	Merge	View	View	View	View	View	Merge
F&R Meals Status Change	Merge	View	View	View	View	View	Merge
F&R Meals Statuses	Merge	View	View	View	View	View	Merge
Family Day Care	Delete	View	View	None	None	View	Delete
Focus	Merge	View	View	None	None	View	Merge
Funding Source	Merge	View	View	None	None	View	Merge
Highest Education Level	Merge	View	View	None	None	View	Merge
Home Hospital Facility	Merge	View	View	View	View	View	Merge
Home Hospital Medical Diagnoses	Merge	View	View	View	View	View	Merge
Home Hospital Programs	Merge	View	View	View	View	View	Merge

Setup list	District Admin	School Admin	School Counselor	School Secretary	Teacher	School Health Pro	District Health Pro
Home Hospital Type	Merge	View	View	View	View	View	Merge
Instructional Group	Merge	View	View	None	None	View	Merge
Join Type	Merge	View	View	None	None	View	Merge
Language Approach	Merge	View	View	None	None	View	Merge
Language Proficiency Levels	Merge	View	View	None	None	View	Merge
Length of Day	Merge	View	View	None	None	View	Merge
Level of Play	Merge	View	View	None	None	View	Merge
Medical Diagnosis	Delete	View	View	None	None	View	Delete
Migrant Classification Subgroup	Merge	View	View	None	None	View	Merge
Migrant Status	Merge	View	View	None	None	View	Merge
Minor\Adult Status	Merge	View	View	None	None	View	Merge
Move Purpose	Merge	View	View	None	None	View	Merge
Nonacceptance Reason	Merge	View	View	None	None	View	Merge
Off Campus Facility	Delete	View	View	None	None	View	Delete
Optional Support	Delete	View	View	None	None	View	Delete
Other Benefits	Delete	View	View	None	None	View	Delete
Out of District Nonacceptance Reason	Merge	View	View	View	View	View	Merge
Out of District Referral Source	Merge	View	View	View	View	View	Merge
Out of District Referred To	Merge	View	View	View	View	View	Merge
Participation Level	Merge	View	View	None	None	View	Merge
Participation Reason	Merge	View	View	None	None	View	Merge
Program	Delete	View	View	None	None	View	Delete
Program Category	Delete	View	View	None	None	View	Delete
Program Documentation	Delete	View	View	None	None	View	Delete
Program Exit Reason	Delete	View	View	None	None	View	Delete
Program Group	Merge	View	View	None	None	View	Merge
Program Interaction	Delete	View	View	None	None	View	Delete
Program Override Reason	Merge	View	View	None	None	None	None
Program Year	Merge	View	View	None	None	View	Merge
Programs Exit Reasons	Merge	View	View	View	View	View	Merge

Setup list	District Admin	School Admin	School Counselor	School Secretary	Teacher	School Health Pro	District Health Pro
Programs NonParticipation Reasons	Merge	View	View	View	View	View	Merge
Programs Yes No NA	Merge	View	View	View	View	View	Merge
Recovery Location	Merge	View	View	None	None	View	Merge
Related Service	Merge	View	View	None	None	View	Merge
Resides With	Merge	View	View	None	None	View	Merge
Run Type	Delete	View	View	None	None	View	Delete
Service Type	Merge	View	View	None	None	View	Merge
Services	Delete	View	View	None	None	View	Delete
SPED ARS	Merge	View	View	View	View	View	Merge
SPED Disabilities	Merge	View	View	View	View	View	Merge
SPED Environment	Merge	View	View	None	None	View	Merge
Status Change	Merge	View	View	None	None	View	Merge
Study Requirements	Delete	View	View	None	None	View	Delete
Suggested Placement	Merge	View	View	None	None	View	Merge
Test Accommodations	Merge	View	View	None	None	View	Merge
USDA Federal Income Guidelines	Merge	View	View	None	None	View	Merge
Vehicles	Delete	View	View	None	None	View	Delete
Year End Approach	Merge	View	View	None	None	View	Merge

Table 92: **Program/Course data setup lists: default permission settings**

Setup list	District Admin	School Admin	School Counselor	School Secretary	Teacher	School Health Pro	District Health Pro
PowerSchool SMS Course Type	Merge	View	View	None	None	None	None
PowerSchool SMS Department	Merge	View	View	None	None	None	None
Course Level	Merge	View	View	None	None	View	Merge
Course Subject Area	Merge	View	View	None	None	None	None
Course Type	Merge	View	View	None	None	None	None

Table 93: School/district data setup lists: default permission settings

Setup list	District Admin	School Admin	School Coun-selor	School Secretary	Teacher	School Health Pro	District Health Pro
Address Exception Reason	Merge	View	View	None	None	None	None
Calculated Grade Override Reason	Merge	View	View	None	None	View	Merge
Chancery SMS Room Type	Merge	View	View	None	None	None	None
Department	Merge	View	View	None	None	View	None
District Name	Merge	View	View	None	None	View	None
GPA Reporting Term	Delete	View	View	View	View	None	None
Override Queue Rank Reason	Merge	View	View	None	None	View	Merge
Schedule Change Reason	Merge	View	View	View	None	View	Merge
School Area Number	Merge	View	View	None	None	View	Merge
School Category	Merge	View	View	None	None	None	None
School Classification	Merge	View	View	None	None	View	Merge
School Name	Merge	View	View	None	None	View	None
School Type	Merge	View	View	None	None	View	Merge
Student Promotion Status	Merge	View	View	None	None	View	Merge

Table 94: Staff data setup lists: default permission settings

Setup list	District Admin	School Admin	School Coun-selor	School Secretary	Teacher	School Health Pro	District Health Pro
Instruction Type to EL	Merge	View	View	None	None	None	None
Licensure Check	Merge	View	View	None	None	None	None
Scheduling Aide Type	Merge	View	View	None	None	None	None
Staff Assignment	Merge	View	View	None	None	None	None
Staff Credential or Teaching Area	Merge	View	View	None	None	None	None
Staff Credential Type	Merge	View	View	None	None	None	None
Staff Department	Merge	View	View	None	None	None	None
Staff Education Level	Merge	View	View	None	None	None	None
Staff Job Classification	Merge	View	View	None	None	None	None
Staff Position Status	Merge	View	View	None	None	None	None
Staff Service to English Learner	Merge	View	View	None	None	None	None
Staff Status	Merge	View	View	None	None	None	None

Setup list	District Admin	School Admin	School Coun-selor	School Secretary	Teacher	School Health Pro	District Health Pro
Teacher Fund	Merge	View	View	None	None	None	None
Teacher Position	Merge	View	View	None	None	None	None

Table 95: Student behavior setup lists: default permission settings

Setup list	District Admin	School Admin	School Coun-selor	School Secretary	Teacher	School Health Pro	District Health Pro
Behavior Action	Merge	View	View	None	None	None	None
Behavior Action Category	Merge	View	View	None	None	None	None
Behavior Action Severity	Merge	View	View	None	None	None	None
Behavior Action Step	Merge	View	View	None	None	None	None
Behavior Action Step Category	Merge	View	View	None	None	None	None
Behavior Action Step Status	Merge	View	View	None	None	None	None
Behavior Action Sub-Category	Merge	View	View	None	None	None	None
Behavior Action Type	Merge	View	View	None	None	None	None
Behavior Attendance Action	Merge	View	View	None	None	None	None
Behavior Discrepancy Reason	Merge	View	View	None	None	None	None
Behavior Enrollment Action	Merge	View	View	None	None	None	None
Behavior Event/Concern	Merge	View	View	None	None	None	None
Behavior Event/Concern Sub-Category	Merge	View	View	None	None	None	None
Behavior Incident and Event/Concern Category	Merge	View	View	None	None	None	None
Behavior Incident and Event/Concern Severity	Merge	View	View	None	None	None	None
Behavior Incident Factor	Merge	View	View	None	None	None	None
Behavior Incident Location	Merge	View	View	None	None	None	None
Behavior Incident Location Category	Merge	View	View	None	None	None	None
Behavior Incident Time Classification	Merge	View	View	None	None	None	None
Behavior Incident Time Sub-Classification	Merge	View	View	None	None	None	None
Behavior Weapon	Merge	View	View	None	None	None	None

Setup list	District Admin	School Admin	School Coun-selor	School Secretary	Teacher	School Health Pro	District Health Pro
Behavior Weapon Category	Merge	View	View	None	None	None	None
Goal/Expected Behavior	Merge	View	View	None	None	View	Merge
Intervention Interruption	Merge	View	View	None	None	View	Merge
Intervention Monitoring Interval	Merge	View	View	None	None	View	Merge
Intervention Outcome	Merge	View	View	None	None	View	Merge
Intervention Progress Status	Merge	View	View	None	None	View	Merge
Intervention Role	Merge	View	View	None	None	View	Merge
Other Person Type	Merge	View	View	None	None	View	Merge
Plan Outcome	Merge	View	View	None	None	View	Merge

Table 96: **Student data setup lists: default permission settings**

Setup list	District Admin	School Admin	School Coun-selor	School Secretary	Teacher	School Health Pro	District Health Pro
Birthdate Verification	Merge	None	None	None	None	None	None
Discipline Individual Type	Merge	View	View	None	None	None	None
Ethnic Category	Merge	View	View	None	None	None	None
Federal Ethnicity	Merge	View	View	None	None	None	None
Federal Race	Merge	View	View	None	None	None	None
Home Language	Merge	View	View	None	None	None	None
Honor Roll Override	Merge	View	View	View	None	None	None
Incomplete Participation Type	Merge	View	View	None	None	None	None
Lunch Status	Merge	View	View	None	None	None	None
Registration Status	Merge	View	View	None	None	None	None
Status Code	Merge	View	View	None	None	None	None
Student Type	Merge	View	View	None	None	View	None

Table 97: **Student health setup lists: default permission settings**

Setup list	District Admin	School Admin	School Coun-selor	School Secretary	Teacher	School Health Pro	District Health Pro
Health Ability To Play Sports	Merge	View	View	None	None	Edit	Merge
Health Dental Observable Problem	Merge	View	View	None	None	Edit	Merge

Setup list	District Admin	School Admin	School Counselor	School Secretary	Teacher	School Health Pro	District Health Pro
Health Dental Referral Status	Merge	View	View	None	None	Edit	Merge
Health Dental Screen Result	Merge	View	View	None	None	Edit	Merge
Health Examination Category	Merge	View	View	None	None	Edit	Merge
Health Examination Type	Merge	View	View	None	None	Edit	Merge
Health Hearing Observable Problem	Merge	View	View	None	None	Edit	Merge
Health Hearing Screen Action	Merge	View	View	None	None	Edit	Merge
Health Hearing Screen Record Type	Merge	View	View	None	None	Edit	Merge
Health Hearing Screen Result	Merge	View	View	None	None	Edit	Merge
Health Hearing Test Device	Merge	View	View	None	None	Edit	Merge
Health Hearing Tested With	Merge	View	View	None	None	Edit	Merge
Health Immunization Dose Action	Merge	View	View	None	None	Edit	Merge
Health Immunization Exemption	Merge	View	View	None	None	Edit	Merge
Health Immunization Modification Reason	Merge	View	View	None	None	Edit	Merge
Health Medical Condition	Merge	View	View	None	None	Edit	Merge
Health Medication Route Type	Merge	View	View	None	None	Edit	Merge
Health Non-Scheduled Immunization Type	Merge	View	View	None	None	Edit	Merge
Health Office Disposition	Merge	View	View	None	None	Edit	Merge
Health Office Examiner	Merge	View	View	None	None	Edit	Merge
Health Pregnancy Outcome	Merge	View	View	None	None	Edit	Merge
Health Pregnancy Special Accommodation	Merge	View	View	None	None	Edit	Merge
Health Screen Action	Merge	View	View	None	None	Edit	Merge
Health Screen Payment Type	Merge	View	View	None	None	Edit	Merge
Health Screen Result	Merge	View	View	None	None	Edit	Merge
Health Screening Record Action	Merge	View	View	None	None	Edit	Merge
Health Screening Referred By	Merge	View	View	None	None	Edit	Merge
Health Soc/Emotional Disposition	Merge	View	View	None	None	View	Merge
Health Soc/Emotional Observable Problem	Merge	View	View	None	None	View	Merge
Health Soc/Emotional Screening	Merge	View	View	None	None	View	Merge

Setup list	District Admin	School Admin	School Coun-selor	School Secretary	Teacher	School Health Pro	District Health Pro
Action							
Health Vision Observable Problem	Merge	View	View	None	None	Edit	Merge
Health Vision Screening Record Type	Merge	View	View	None	None	Edit	Merge
Health Vision Test Device	Merge	View	View	None	None	Edit	Merge
Health Vision Tested With	Merge	View	View	None	None	Edit	Merge
Health Yes No	Merge	View	View	None	None	Edit	Merge
Immunization Action	Merge	View	View	None	None	Edit	Merge
Immunization Dose Action	Merge	View	View	None	None	Edit	Merge
Immunization Does Modification	Merge	View	View	None	None	Edit	Merge
Immunization Does Name	Merge	View	View	None	None	Edit	Merge

Table 98: **Test management setup lists: default permission setting**

Setup list	District Admin	School Admin	School Coun-selor	School Secretary	Teacher	School Health Pro	District Health Pro
Alpha Test Score Type	Merge	View	View	None	None	View	Merge
Exemption Reason	Merge	View	View	None	None	View	Merge
Norm Type	Merge	View	View	None	None	None	None
Norming Period	Merge	View	View	None	None	None	None
Score Type	Merge	View	View	None	None	None	None
Skill	Merge	View	View	None	None	None	None
Subtest Code	Merge	View	View	None	None	None	None
Test Category	Merge	View	View	None	None	None	None
Test Code	Merge	View	View	None	None	None	None
Test Grade Level	Merge	View	View	None	None	None	None
Test Subject Content	Merge	None	None	None	None	None	None
Test Use	Merge	None	None	None	None	None	None

Table 99: **Transportation setup lists: default permission settings**

Setup list	District Admin	School Admin	School Coun-selor	School Secretary	Teacher	School Health Pro	District Health Pro
All Setup Lists in this sub-category	Merge	View	View	View	View	None	None

Staff permissions

Permissions in this category pertain to recording information about district staff [p. 215]. These permissions include:

- *Access to SSN permission* [p. 751]
- *District Staff Assignments permission* [p. 751]
- *School Staff Assignments permission* [p. 752]
- *Staff Additional Info permission* [p. 752]
- *Staff Address/Phone permission* [p. 753]
- *Staff Demographics permission* [p. 754]
- *Staff Overview permission* [p. 754]
- *Staff Professional Info permission* [p. 755]
- *Staff Schools permission* [p. 756]

Access to SSN permission

This permission controls the user's ability to add or change data in the **Social security #** field on the Staff Demographics page under Overview [p. 220].

Settings:

- **Edit**: The user can add and edit data in the Social security # field.
- **View**: The user can view but not add or edit data in the Social security # field.
- **None**: The user is unable to view or work with the Social security# field.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **None**
- School Counselor: **None**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

District Staff Assignments permission

This permission controls the user's ability to add district staff assignments [*District staff assignments* p.226].

Dependencies:

- For this permission to be effective, the setting for the *Staff Demographics permission* [p. 754] must be View, Edit, or Delete.

Settings:

- **Delete**: The user can add, edit, and delete district staff assignments.
- **Edit**: The user can add and edit district staff assignments.

- **View**: The user can view but not change district staff assignments.
- **None**: The user is unable to view or work with district staff assignments.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

School Staff Assignments permission

This permission controls the user's ability to add school staff assignments [*School assignments* p.224].

Dependencies:
- For this permission to be effective, the setting for the *Staff Demographics permission* [p. 754] must be View, Edit, or Delete.
- For this permission to be effective, the setting for the *Staff Schools permission* [p. 756] must be Edit or Delete.

Settings:
- **Delete**: The user can add, edit, and delete school staff assignments.
- **Edit**: The user can add and edit school staff assignments.
- **View**: The user can view but not change school staff assignments.
- **None**: The user is unable to view or work with school staff assignments.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Staff Additional Info permission

This permission controls the user's ability to work with additional information about a staff member, including ethnic category and previous name [*Staff Demographics: Additional Info* p.222].

Dependencies:
- For this permission to be effective, the setting for the *Staff Demographics permission* [p. 754] must be View, Edit, or Delete.

Settings:

- **Delete**: The user can edit additional information about a staff member.
- **Edit**: Same as Delete.
- **View**: The user can view but not change additional information about a staff member.
- **None**: The user is unable to view or work with additional information about a staff member.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Staff Address/Phone permission

This permission controls access the user's ability to work with a staff member's contact information, including address and phone numbers [*Staff Demographics: Address/Phone* p.221].

Dependencies:

- For this permission to be effective, the setting for the *Staff Demographics permission* [p. 754] must be View, Edit, or Delete.

Settings:

- **Delete**: The user can edit contact information for a staff member.
- **Edit**: Same as Delete.
- **View**: The user can view but not change contact information for a staff member.
- **None**: The user is unable to view or work with contact information for a staff member.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Staff Demographics permission

This permission controls the user's ability to work with demographic information about a staff member [*Staff Demographics record* p.220].

Dependencies:

- This permission supersedes all other staff-related permissions. For example, this permission's setting must be Edit for the Edit setting to be effective for the following permissions:
  District Staff Assignments permission [p. 751]
  School Staff Assignments permission [p. 752]
  Staff Schools permission [p. 756]
  Staff Additional Info permission [p. 752]
  Staff Address/Phone permission [p. 753]
  Staff Overview permission [p. 754]
  Staff Professional Info permission [p. 755]
- This permission's setting must be Delete for the Delete setting to be effective for the following permissions:
  District Staff Assignments permission [p. 751]
  School Staff Assignments permission [p. 752]
  Staff Schools permission [p. 756]

Settings:

- **Delete**: The user can edit demographic information for a staff member.
- **Edit**: Same as Delete.
- **View**: The user can view but not change demographic information for a staff member.
- **None**: The user is unable to view or work with demographic information for a staff member.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Staff Overview permission

This permission controls the user's ability to work with general overview information about a staff member such as Staff ID, home school, and title [*Staff Demographics: Overview* p.220].

Dependencies:

- For this permission to be effective, the setting for the *Staff Demographics permission* [p. 754] must be View, Edit, or Delete.

Settings:

- **Delete**: The user can edit overview information about a staff member.
- **Edit**: Same as Delete.
- **View**: The user can view but not change overview information about a staff member.
- **None**: The user is unable to view or work with overview information about a staff member.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Staff Professional Info permission

This permission controls the user's ability to work with professional information about a staff member such as credentials and positions held [*Staff Demographics: Overview* p.220].

Dependencies:

- For this permission to be effective, the setting for the *Staff Demographics permission* [p. 754] must be View, Edit, or Delete.

Settings:

- **Delete**: The user can edit professional information about a staff member.
- **Edit**: Same as Delete.
- **View**: The user can view but not change professional information about a staff member.
- **None**: The user is unable to view or work with professional information about a staff member.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Staff Schools permission

This permission controls the user's ability to work with a staff member's record of school assignments [*Staff Schools record* p.222].

Dependencies:

- For this permission to be effective, the setting for the *Staff Demographics permission* [p. 754] must be View, Edit, or Delete.

Settings:

- **Delete**: The user can add, edit, and delete a staff member's record of school assignments.
- **Edit**: The user can add and edit a staff member's record of school assignments.
- **View**: The user can view but not change a staff member's record of school assignments.
- **None**: The user is unable to view or work a staff member's record of school assignments.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

State Reporting permissions

These permissions include:

- *Create State Reporting Package permission* [p. 756]
- *Generate Extract permission* [p. 757]
- *Install State Reporting Package permission* [p. 757]
- *State Reporting Setup permission* [p. 758]

Create State Reporting Package permission

This permission controls the user's ability to create a custom reporting package for a state.

To create a custom state reporting package [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.

2 Under **State Reporting**, click **Create State Reporting Package**.

Dependencies: None

---

[1]You can do this if your role is District Administrator.

Settings:

- **Yes**: The user can create a custom state reporting package.
- **No**: The link does not appear on the District Setup page.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Generate Extract permission

This permission controls the user's ability to generate an extract for state reporting.

To generate an extract for state reporting [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **State Reporting**, click <u>Generate Extract</u>.

Dependencies:

- To control the ability to set up extracts for state reporting, refer to the permission to set up extracts, see *State Reporting Setup permission* [p. 758].

Settings:

- **Yes**: The user can generate an extract for state reporting.
- **No**: The link does not appear on the District Setup page.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Install State Reporting Package permission

This permission controls the user's ability to install a state reporting package.

---

[1]You can do this if your role is District Administrator.

To install a state reporting package [DA[1]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **State Reporting**, click **Install State Reporting Package**.

Dependencies: None

Settings:

- **Yes**: The user can install a state reporting package.
- **No**: The link does not appear on the District Setup page.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

State Reporting Setup permission

This permission controls the user's ability to set up, organize, and classify state reporting configurations.

To set up state reporting configurations [DA[2]]:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **State Reporting**, click **State Reporting Setup**. The General Setup Summary page appears.
3 Use this page and the following control bar links:
   - **Extracts**
   - **Groups**
   - **Categories**

Dependencies:

- To control the ability to generate an extract for state reporting, refer to the *Generate Extract permission* [p. 757].

Settings:

- **Delete**: The user can add, edit, and delete information on the PowerSchool SMS pages pertaining to state reporting setup.
- **Edit**: The user can add and edit information on the PowerSchool SMS pages pertaining to state reporting setup.

---

[1]You can do this if your role is District Administrator.
[2]You can do this if your role is District Administrator.

- **View**: The user can view but not change information on the PowerSchool SMS pages pertaining to state reporting setup.
- **None**: The link does not appear on the District Setup page.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Student Behavior permissions

Permissions in this category pertain to recording student behavior incidents [p. 89]. These permissions include:
- *Academic Category Severity permission* [p. 759]
- *Attendance Category Severity permission* [p. 760]
- *Behavior Category 1 Severity permission* [p. 760]
- *Cross-School Student Behavior Access permission* [p. 761]
- *Discipline Category Severity permission* [p. 761]
- *Non-Discipline Category Severity permission* [p. 762]
- *Override Student Behavior Enrollment permission* [p. 763]
- *Student Behavior Preferences permission* [p. 763]

Academic Category Severity permission

This permission controls the user's ability to work with student behavior incidents [p. 89] associated with the security classification "Academic Category". PowerSchool SMS provides one permission for each severity level: High, Medium, and Low. An incident's security classification is determined by the Behavior Security field in the "Behavior Incident and Event/Concern" setup list.

Dependencies: None

Settings:
- **Delete**: The user can work with behavior incidents associated with the security classification "Academic Category".
- **Edit**: Same as Delete.
- **View**: The user can view but not change behavior incidents associated with the security classification "Academic Category".
- **None**: The user is unable to work with behavior incidents associated with the security classification "Academic Category".

Default settings by base role [p. 246]:
- District Administrator: **Edit**
- School Administrator: **Edit**

- School Counselor: **Edit**
- School Secretary: **None**
- Teacher: **Edit**
- School Health Professional: **None**
- District Health Professional: **None**

Attendance Category Severity permission

This permission controls the user's ability to work with student behavior incidents [p. 89] associated with the security classification "Attendance Category". PowerSchool SMS provides one permission for each severity level: High, Medium, and Low. An incident's security classification is determined by the Behavior Security field in the "Behavior Incident and Event/Concern" setup list.

Dependencies: None

Settings:

- **Delete**: The user can work with behavior incidents associated with the security classification "Attendance Category".
- **Edit**: Same as Delete.
- **View**: The user can view but not change behavior incidents associated with the security classification "Attendance Category".
- **None**: The user is unable to work with behavior incidents associated with the security classification "Attendance Category".

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **None**
- Teacher: **Edit**
- School Health Professional: **None**
- District Health Professional: **None**

Behavior Category 1 Severity permission

This permission controls the user's ability to work with student behavior incidents [p. 89] associated with the security classification "Behavior Category 1". PowerSchool SMS provides one permission for each severity level: High, Medium, and Low. An incident's security classification is determined by the Behavior Security field in the "Behavior Incident and Event/Concern" setup list.

Dependencies: None

Settings:

- **Delete**: The user can work with behavior incidents associated with the security classification "Behavior Category 1".
- **Edit**: Same as Delete.

- **View**: The user can view but not change behavior incidents associated with the security classification "Behavior Category 1".
- **None**: The user is unable to work with behavior incidents associated with the security classification "Behavior Category 1".

Default settings by base role [p. 246]:
- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **None**
- Teacher: **Edit**
- School Health Professional: **None**
- District Health Professional: **None**

Cross-School Student Behavior Access permission

This permission controls the user's ability to work with behavior incidents [p. 89] at any district school.

Dependencies:

The user's ability to work with a behavior incident may be limited by other behavior-related permissions, including:
- *Academic Category Severity permission* [p. 759]
- *Attendance Category Severity permission* [p. 760]
- *Behavior Category 1 Severity permission* [p. 760]
- *Discipline Category Severity permission* [p. 761]
- *Non-Discipline Category Severity permission* [p. 762]

Settings:
- **Yes**: The user is able to work with behavior incidents recorded at any district school.
- **No**: The user is able to work with behavior incidents at his or her school.

Default settings by base role [p. 246]:
- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **Yes**
- School Health Professional: **No**
- District Health Professional: **No**

Discipline Category Severity permission

This permission controls the user's ability to work with student behavior incidents [p. 89] associated with the security classification "Discipline Category". PowerSchool SMS provides one permission for each severity level: High, Medium, and Low. An incident's security classification is determined

by the Behavior Security field in the "Behavior Incident and Event/Concern" setup list.

Dependencies: None

Settings:

- **Delete**: The user can work with behavior incidents associated with the security classification "Discipline Category".
- **Edit**: Same as Delete.
- **View**: The user can view but not change behavior incidents associated with the security classification "Discipline Category".
- **None**: The user is unable to work with behavior incidents associated with the security classification "Discipline Category".

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **None**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Non-Discipline Category Severity permission

This permission controls the user's ability to work with student behavior incidents [p. 89] associated with the security classification "Non-Discipline Category". PowerSchool SMS provides one permission for each severity level: High, Medium, and Low. An incident's security classification is determined by the Behavior Security field in the "Behavior Incident and Event/Concern" setup list.

Dependencies: None

Settings:

- **Delete**: The user can work with behavior incidents associated with the security classification "Non-Discipline Category".
- **Edit**: Same as Delete.
- **View**: The user can view but not change behavior incidents associated with the security classification "Non-Discipline Category".
- **None**: The user is unable to work with behavior incidents associated with the security classification "Non-Discipline Category".

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **None**
- School Secretary: **None**
- Teacher: **Edit**
- School Health Professional: **None**

- District Health Professional: **None**

Override Student Behavior Enrollment permission

This permission controls the user's ability to enroll a student [p. 146] who is subject to student behavior [p. 89] enrollment restrictions.

Settings:

- **Yes**: The user is able to enroll a student who is subject to student behavior enrollment restrictions.
- **No**: The user is able to enroll a student who is not subject to student behavior restrictions.

Default settings by base role [p. 246]:

- District Administrator: **No**
- School Administrator: **Yes**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Student Behavior Preferences permission

This permission controls the user's ability to set preferences for student behavior records for the district see *Student behavior setup* [p. 265]. Such preferences include specifying the student behavior [p. 89] records that can be viewed by users at the receiving school when a student transfers from one district school to another,.

Dependencies: None

Settings:

- **Delete**: The user can change Student Behavior Preferences.
- **Edit**: Same as Delete.
- **View**: The user can view but not change Student Behavior Preferences.
- **None**: The user is unable view or work with Student Behavior Preferences.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **View**
- School Counselor: **None**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Students permissions

Permissions in this category pertain to viewing and recording student information [p. 37]. These permissions include:

- *Access to SSN permission* [p. 765]
- *Add Students permission* [p. 765]
- *Add Student to Other Schools permission* [p. 766]
- *Assign Family permission* [p. 766]
- *Assign Homerooms permission* [p. 767]
- *Assign Multi-Values permission* [p. 767]
- *Awards permission* [p. 769]
- *Awards permission* [p. 769]
- *Background Data permission* [p. 769]
- *Birth Certificate permission* [p. 770]
- *Contact Information permission* [p. 771]
- *Course recommendations and requests permission* [p. 771]
- *Course requests approval permission* [p. 772]
- *Date/Year Entered 9th Grade permission* [p. 772]
- *Delete Student from district permission* [p. 773]
- *Demographic Data permission* [p. 773]
- *Dental Screenings permission* [p. 774]
- *Distance From School permission* [p. 775]
- *Edit Enrollment for other schools* [p. 775]
- *Edit Address Validation Override Reason permission* [p. 776]
- *Edit Student Schedules permission* [p. 776]
- *Hearing Screenings permission* [p. 777]
- *Home Language Survey permission* [p. 778]
- *Legal Alert permission* [p. 778]
- *Lunch Status Panel permission* [p. 779]
- *Manage Student Enrollments permission* [p. 780]
- *Medical Alert permission* [p. 780]
- [p. 781]
- *Modify Counselor Assignment permission* [p. 781]
- *Modify Home School permission* [p. 781]
- *Override Honor Rolls permission* [p. 782]
- *Photos permission* [p. 783]
- *Receives Specialized Services Field permission* [p. 783]
- *Registration Information permission* [p. 784]
- *Resource Assignments permission* [p. 784]
- *Soc/Emotional Screenings permission* [p. 785]
- *State Student Number permission* [p. 786]
- *Student Address Phone permission* [p. 787]
- *Student Federal Info permission* [p. 787]
- *Student Health Conditions permission* [p. 788]
- *Student Health Examinations permission* [p. 789]

- *Student Health Immunizations permission* [p. 789]
- *Student Health Medication permission* [p. 790]
- *Student Health Office permission* [p. 791]
- *Student Health Pregnancy permission* [p. 792]
- *Student Health Profile permission* [p. 793]
- *Student Medical Info permission* [p. 793]
- *Student Overview permission* [p. 794]
- *Student Personal Info permission* [p. 795]
- *Student School Specific permission* [p. 795]
- *Student Standardized Tests permission* [p. 796]
- *Student Test Results - Assessment permission* [p. 797]
- *Student Test Results - Standard permission* [p. 797]
- *Vision Screenings permission* [p. 798]
- *Withdraw Student permission* [p. 799]

Access to SSN permission

This permission controls the user's ability to add or change data in the **Social security #** field on the Overview tab of the Student Demographics page [p. 56].

Settings:

- **Edit**: The user can add and edit data in the Social security # field.
- **View**: The user can view but not add or edit data in the Social security # field.
- **None**: The user is unable to view or work with the Social security# field.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **None**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Add Students permission

This permission controls the user's ability to register a new student [p. 138]. This permission does not control the user's ability to enroll students [p. 141].

Dependencies:

- For this permission to be effective, the setting for the *Demographic Data permission* [p. 773] must be Edit or Delete.

Settings:

- **Yes**: The user can register a new student.
- **No**: The user cannot register a new student.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **Yes**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Add Student to Other Schools permission

This permission controls the user's ability to select from all district schools (rather than just the user's home school) for the School of Enrollment field on the Student Enrollment page [p. 148].

Dependencies:

- None

Settings:

- **Yes**: The user can select from all district schools.
- **No**: The user can select only his or her home school or no school ("N/A").

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **No**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Assign Family permission

This permission controls the user's ability to assign a student to a family [p. 70].

Dependencies:

- This permission takes effect only on a system that employs family management (which is enabled when the administrator installs PowerSchool SMS [p. 403]).
- The user's ability to edit family information is controlled by the *Family Information permission* [p. 670].

Settings:

- **Yes**: The user can assign a student to a family.
- **No**: The user is unable to assign a student to a family. On the Family Overview page, PowerSchool SMS does not display the Add New and Add Existing buttons.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **yes**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Assign Homerooms permission

This permission controls the user's ability to set or change a student's homeroom [p. 71].

Dependencies:

- The user's ability to assign a homeroom to more than one student is controlled by the *Assign Values permission* [p. 768].
- The user's ability to manually assign a homeroom on the Student Demographics page [p. 55] is controlled by the *Student School Specific permission* [p. 795].

Settings:

- **Yes**: The user can set or change a student's homeroom.
- **No**: The user is unable to set or change a student's homeroom. On the Roster and Student Search results pages [p. 48], PowerSchool SMS does not display the Transfer Homeroom selection in the Actions menu.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **Yes**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Assign Multi-Values permission

This permission controls the user's ability to add a value to one or more student records [p. 54] that can hold more than one value or change an existing value; for example, Federal Race.

To add a value to a field or change it:

1 On a page of Student Search results [p. 48], select one or more students.
2 In the **Actions** menu, click **Assign > Assign Multi-Values**. The Assign Multi-Values page appears.

Dependencies: None

Settings:

- **Yes**: The user can add a value to a field or change it.
- **No**: The user is unable to add a value to a field. On a Student Search results page, PowerSchool SMS does not display the Assign > Assign Multi-Values selection in the Actions menu.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **Yes**
- District Health Professional: **No**

Assign Values permission

This permission controls the user's ability to assign a value to one student record field for one or more students; for example, Registration Grade Level.

To assign a value to a field for one or more students:

1 On a page of Student Search Results [p. 48], select one or more students.
2 In the **Actions** menu, click **Assign > Assign Values**. The Assign Values page appears.

Dependencies: None

Settings:

- **Yes**: The user can assign a value to a student record field for one or more students.
- **Yes**: The user is unable to assign a value to a student record field for one or more students. On the Search Results page, PowerSchool SMS does not display the Assign Values selection in the Actions menu.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **Yes**
- Teacher: **No**
- School Health Professional: **Yes**
- District Health Professional: **No**

Awards permission

This permission controls the user's ability to add, change, and delete award recipient lists, print awards, and view students' awards [p. 75].

Dependencies:

- This permission applies only to a user whose role's scope is at the school level [p. 240].
- The user's ability to open the Student Demographics page [p. 55] (on which the Awards link is displayed) is controlled by *Demographic Data permission* [p. 773].
- The user's ability to create an award is controlled by the *Award Setup permission* [p. 709].

Settings;

- **Delete**: The user can add, edit or delete award recipient lists and print awards. The user can also view a list of awards a student has received.
- **Edit**: The user can add or change, but not delete, award recipient lists and print awards. The user can also view a list of awards a student has received.
- **View**: The user can view, but not change, award recipient lists and print awards. The user can also view a list of awards a student has received.
- **None**: The user is unable to view award recipients. In the **School** menu, PowerSchool SMS does not display the Awards link.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **Delete**
- Teacher: **View**
- School Health Professional: **None**
- District Health Professional: **None**

Background Data permission

This permission controls the user's ability to work with students' background information [p. 75], primarily for program management purposes [p. 88].

Dependencies:

- For this permission to be effective, the setting for the *Demographic Data permission* [p. 773] must be Edit or Delete.

Settings:

- **Delete**: The user can add, edit, and delete a student's background information.
- **Edit**: Same as Delete.

- **View**: The user can view but not change a student's background information.
- **None**: The user is unable to view a student's background information. On the Student Demographics page [p. 55], in the control bar, PowerSchool SMS does not display the Background Data link.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **Edit**
- District Health Professional: **Delete**

Birth Certificate permission

This permission controls the user's ability to work with a scanned birth certificate stored on the student's demographic record [p. 60].

Dependencies:
- For this permission to be effective, the setting for the *Demographic Data permission* [p. 773] must be Edit or Delete.
- For this permission to be effective, the setting for the *Student Personal Info permission* [p. 795] must be View or Delete.

Settings:
- **Delete**: The user can upload a scanned birth certificate to a student's demographic record, replace the uploaded certificate, or delete the uploaded certificate.
- **Edit**: The user can upload a scanned birth certificate to a student's demographic record or replace the uploaded certificate.
- **View**: The user can view but not change the birth certificate on a student's demographic record.
- **None**: Same as View

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **Delete**
- Teacher: **View**
- School Health Professional: **View**
- District Health Professional: **View**

Contact Information permission

This permission controls the user's ability to work with students' contacts [p. 64] [p. 70].

Dependencies:

- For this permission to be effective, the setting for the *Demographic Data permission* [p. 773] must be Edit or Delete.

Settings:

- **Delete**: The user can add, change, or delete a student's contacts.
- **Edit**: The user can add or change, but not delete, a student's contacts.
- **View**: The user can view but not change a student's contacts.
- **None**: The user does not have access to a student's contact. On the Student Demographics page [p. 55], on the School Specific tab, PowerSchool SMS does not display the Contact Information panel. In the control bar, PowerSchool SMS does not display the Contacts link.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **Edit**
- Teacher: **View**
- School Health Professional: **View**
- District Health Professional: **View**

Course recommendations and requests permission

This permission controls the user's ability to make course recommendations for the purpose of online course requests [p. 231].

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:

- **Delete**: The user can add, change, or delete a course recommendation.
- **Edit**: The user can add or change a course recommendation.
- **View**: The user can view but not change a course recommendation.
- **None**: The user does not have access to a course recommendations.

Default settings by base role [p. 246]:

- District Administrator: **None**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **None**

- Teacher: **Edit**
- School Health Professional: **None**
- District Health Professional: **None**

Course requests approval permission

This permission controls the user's ability to approve an online course request [p. 231] submitted by a student through ParentCONNECTxp.

Dependencies

- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:

- **Yes**: The user can approve an online course request.
- **No**: The user approve an online course request.

Default settings by base role [p. 246]:

- District Administrator: **No**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Date/Year Entered 9th Grade permission

This permission controls the user's ability to work with the Year/Date Entered 9th Grade field [p. 60].

Dependencies:

- For this permission to be effective, the setting for the *Demographic Data permission* [p. 773] must be Edit or View.
- For this permission to be effective, the setting for the *Student Personal Info permission* [p. 795] must be Edit or View.

Settings:

- Edit: The user can record or delete information in this field.
- View: The user can view but not change information in this field.
- None: The user is unable to view this field. On the Student Demographics page [p. 55], PowerSchool SMS does not display the field.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **View**
- Teacher: **View**

- School Health Professional: **View**
- District Health Professional: **View**

Delete Student from district permission

This permission controls the user's ability to delete students from the district [p. 140].

Dependencies: None

Settings:

- **Yes**: The user can delete a student from the district.
- **No**: The user is unable to delete a student from the district.

Default settings by base role [p. 246]:
- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Demographic Data permission

This permission controls the user's ability to work with student demographic information [p. 55]. This permission supersedes all other student permissions.

Dependencies

- The user's ability to work with Student Address/Phone information on the Student Demographics page [p. 55] is controlled by the *Student Address Phone permission* [p. 787].
- The user's ability to work with Student Federal Info information on the Student Demographics page [p. 55] is controlled by the *Student Federal Info permission* [p. 787].
- The user's ability to work with Student Overview information on the Student Demographics page [p. 55] is controlled by the *Student Overview permission* [p. 794].
- The user's ability to work with Student Personal information on the Student Demographics page [p. 55] is controlled by the *Student Personal Info permission* [p. 795].
- For a user whose role's scope is only at the school level [p. 240] to work School Specific information on the Student Demographics page, the setting for the *Student School Specific permission* [p. 795] must be View or Edit.

Settings:

- **Edit**: The user can add, change, or delete a student's demographic information.

- **View**: The user can view but not change a student's demographic information.
- **None**: The user is unable to view a student's demographic information.

Default settings by base role [p. 246]:
- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **Edit**
- Teacher: **View**
- School Health Professional: **Edit**
- District Health Professional: **Edit**

Dental Screenings permission

This permission enables users to work with students' dental health information. For more information on student health records, refer to the *PowerSchool SMS Health Tracking Guide*.

To work with information about a student's dental screenings:

1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.
2 In the control bar, click **Health Tracking**. The Health Profile page appears.
3 In the control bar, click **Screenings**, then click **Dental**. The Dental page appears.

Dependencies:

- For this permission to be effective, the setting for the *Demographic Data permission* [p. 773] must be Edit or View.

Settings:

- **Delete**: The user can add, change, or delete a student's dental health information.
- **Edit**: Same as Delete.
- **View**: The user can view but not change a student's dental health information.
- **None**: The user is unable to view a student's dental health information. On the Student Demographics page [p. 55], in the control bar, PowerSchool SMS does not display the Dental link.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **View**
- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **Edit**
- District Health Professional: **Delete**

Distance From School permission

This permission controls the user's ability to work with the Distance From School field in the School Specific tab of the Student Demographics page [p. 55].

Dependencies:

- For this permission to be effective, the setting for the *Demographic Data permission* [p. 773] must be Edit or View.
- For this permission to be effective, the setting for the *Student School Specific permission* [p. 795] must be Edit or Delete.

Settings:

- **Delete**: The user can view, change, or delete information in the Distance From School field.
- **Edit**: Same as Delete.
- **View**: The user can view but not change the information in the Distance From School field.
- **None**: The user is unable to view the Distance From School field.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **View**
- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **View**
- District Health Professional: **View**

Edit Enrollment for other schools

This permission controls the user's ability to edit a student enrollment record for another school.

Dependencies:

- The user can delete a student enrollment record at another school ony if the setting for the *Manage Student Enrollments permission* [p. 780] permission is "Yes".

Settings:

- **Yes**: The user can view or change a student enrollment record at another school (with the exception of the record's Grade and School of Enrollment fields).
- **No**: The user is able to view but not change a student enrollment record at another school.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **View**

- School Counselor: **None**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Edit Address Validation Override Reason permission

This permission controls the user's ability to record a reason for an address exception for a student who is enrolling in an out-of-zone school [p. 258].

Dependencies:

- This permission applies only to a system that employs address validation [p. 258].
- For the user to view the Registration/Enrollment Search page, the setting for the *Add Students permission* [p. 765] must be Yes.

Settings:

- **Yes**: The user can view or change the exception reason.
- **No**: The user is unable to view the exception reason. On the Edit Status Code page, PowerSchool SMS does not display the Exception Reason field.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **Yes**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Edit Student Schedules permission

This permission controls the user's ability to work with a student's schedule [p. 280], including making course requests [p. 108].

To work with a student's schedule:

1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.
2 In the control bar, click **Schedule**. The Student Schedule page appears.

Dependencies:

- For the user to view the Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.
- For information about controlling access to resource assignments on the Student Schedule page, refer to the *Student School Specific permission* [p. 795].

Settings:

- **Yes**: The user can view and change a student's schedule.
- **No**: The user is unable to view a student's schedule. In the control bar of the Student Demographics page [p. 55], PowerSchool SMS does not display the Schedule link.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **Yes**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Hearing Screenings permission

This permission controls the user's ability to work with information on student hearing. For more information on student health records, refer to the *PowerSchool SMS Health Tracking Guide*.

To work with information about a student's hearing screenings:

1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.
2 In the control bar, click **Health Tracking**. The Health Profile page appears.
3 In the control bar, click **Screenings**, then click **Hearing**. The Hearing page appears.

Dependencies

- For the user to view the Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Delete**: The user can add, edit, and delete a student's hearing records.
- **Edit**: Same as Delete.
- **View**: The user can view but not change a student's hearing information.
- **None**: The user is unable to view a student's hearing information. On the Student Demographics page, PowerSchool SMS does not display the Hearing link in the control bar.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **View**
- School Secretary: **View**

- Teacher: **View**
- School Health Professional: **Edit**
- District Health Professional: **Delete**

Home Language Survey permission

This permission controls the user's ability to work with information on a student record's Home Language Survey panel see *Student Demographics: Federal Info* [p. 63].

Dependencies:

- For the user to view the Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.
- For the user to view the Student Demographics page's Federal Info tab, the setting for the *Student Federal Info permission* [p. 787] must be View or Edit.

Settings:

- **Edit**: The user is able to change the information in the Home Language Survey panel.
- **View**: The user is able to view but not change the information in the Home Language Survey panel.
- **None**: The user is unable to view the Home Language Survey panel. On the Student Demographics page's Federal Info tab, PowerSchool SMS does not display the Home Language Survey panel.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **Edit**
- Teacher: **View**
- School Health Professional: **View**
- District Health Professional: **View**

Legal Alert permission

This permission controls the user's ability to work with vital legal information about the student. This information is stored in a student record's Legal Information panel [p. 59].

Dependencies:

- For the user to view the Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.
- For the user to view the Student Demographics page's School Specific tab, the setting for the *Student School Specific permission* [p. 795] must be View or Edit.

Settings:

- **Edit**: The user is able to view and change a student's legal information.
- **View**: The user is able to view but not change a student's legal information.
- **None**: The user is unable to view a student's legal information. On the Student Demographics page's School Specific tab, PowerSchool SMS does not display the Legal Information panel.

Default settings by base role [p. 246]:

- District Administrator: **View**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **View**
- District Health Professional: **None**

Lunch Status Panel permission

This permission controls the user's ability to work with a student's lunch status. This information is stored in a student record's Lunch Information panel see *Student records* [p. 54].

Dependencies:

- For the user to view the Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.
- For the user to view the Student Demographics page's School Specific tab, the setting for the *Student School Specific permission* [p. 795] must be View or Edit.

Settings:

- **Delete**: The user can change a student's lunch status.
- **Edit**: Same as Delete.
- **View**: The user can view but not change a student's lunch status.
- **None**: The user is unable to view a student's lunch status. On the Student Demographics page's School Specific tab, PowerSchool SMS does not display the Lunch Information panel.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **View**
- District Health Professional: **View**

Manage Student Enrollments permission

This permission controls the user's access to the Enrollments page *[p. 141]* , the ability to adjust a student's enrollments

Settings:

- **Delete**: The user can work with a student's enrollments on the Enrollments page.
- **Edit**: Same as Delete.
- **View**: The user can view but not change a student's enrollments.
- **None**: The user is unable to view the Enrollments page.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **View**
- School Secretary: **Edit**
- Teacher: **View**
- School Health Professional: **View**
- District Health Professional: **View**

Medical Alert permission

This permission controls the user's ability to work with a student's vital medical information. This information is stored in a student record's Medical Info tab [p. 63].

Dependencies:

- The effect of this permission depends on the setting for the *Student Medical Info permission* [p. 793].
- For the user to view the Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Edit**: The user can work with a student's vital medical information.
- **View**: The user can view but not change a student's vital medical information.
- **None**: The user is unable to view a student's vital medical information. On the Student Demographics page's Medical Info tab, PowerSchool SMS does not display the Medical Alert field.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **Edit**

- District Health Professional: **Edit**

Modify Counselor Assignment permission

This permission controls the user's ability to change the school counselor [p. 246] assigned to one or more students see *Student records* [p. 54] [see also *Assigning an academic plan* p.105].

Dependencies: None

Settings:

- **Yes**: The user can change the school counselor assigned to one or more students.
- **No**: The user is unable to change the school counselor assigned to one or more students.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Modify Home School permission

This permission controls the user's ability to work with the Home School (Active) field in the School Specific tab of the Student Demographics page [p. 54].

Dependencies:

- For the user to view the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.
- For the user to view the Student Demographics page's Overview tab, the setting for the *Student Overview permission* [p. 794] must be View or Edit.
- For the user to view the Student Demographics page's School Specific tab, the setting for the *Student School Specific permission* [p. 795] must be View or Edit.

Settings:

- **Yes**: The user can view and change the information in the Home School (Active) field.
- **No**: The user can view but not change the information in the Home School (Active) field.

Default settings by base role [p. 246]:

- District Administrator: **Yes**

- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Override Honor Rolls permission

This permission controls the user's ability to add a student to an honor roll for which that student is not eligible. For detailed information on honor rolls, refer to the *PowerSchool SMS Grading Setup Guide*.

To work with an honor roll:

1 In the **Admin** menu, click **Grading**. The Grading page appears.
2 Under **Step 7**, click **Calculate Honor Rolls**. The Honor Rolls page appears.

To view a student's honor roll membership:

1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.
2 In the control bar, click Honor Rolls. The Student Honor Rolls page appears.

Dependencies:

- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.
- For the user to work with an honor roll, at least one Honor Roll Definition must exist and the setting for the *Honor Rolls permission* [p. 675] must be Edit.
- For this permission to be effective, the user must have access to the Grading page see *Grading permissions* [p. 672] or the Student Demographics page's Grading control bar links.

Settings:

- **Yes**: The user can add, edit, or delete student honor rolls for which the student is not eligible. The user can unassign a student for which an override exist on the Manage Honor Rolls page.
- **No**: The user is unable to save a student honor roll if that student is not eligible for that honor roll. The user cannot unassign a student for which an override exist on the Manage Honor Rolls page

Default settings by base role [p. 246]:

- District Administrator: **No**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**

- District Health Professional: **No**

Photos permission

This permission controls the user's ability to work with student photos [p. 57].

Dependencies:

- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.
- For the user to view the Student Demographics page's Overview tab, the setting for the *Student Overview permission* [p. 794] must be View or Edit.
- For the user to view the Student Demographics page's School Specific tab, the setting for the *Student School Specific permission* [p. 795] must be View or Edit.

Settings:

- **Delete**: The user can upload, edit, and delete student photos.
- **Edit**: Same as Delete.
- **View**: The user can view but not upload or change student photos.
- **None**: The user is unable to view or work with student photos.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **Delete**
- Teacher: **View**
- School Health Professional: **View**
- District Health Professional: **View**

Receives Specialized Services Field permission

This permission controls the user's ability to work with the Receives Specialized Services check box and date field in the Overview tab of the Student Demographics page [p. 56].

Dependencies:

- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.
- For the user to view the Student Demographics page's Overview tab, the setting for the *Student Overview permission* [p. 794] must be View or Edit.

Settings:

- **Edit**: The user can view and change the Receives Specialized Services check box and date field.

- **View**: The user can view but not change the Receives Specialized Services check box and date fields.
- **None**: The user is unable to view the Receives Specialized Services check box and date field.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **View**
- School Health Professional: **None**
- District Health Professional: **None**

Registration Information permission

This permission controls the user's ability to work with a student's registration information once that student is registered [>>].

Dependencies:

- For the user to register a new student, the setting for the *Add Students permission* [p. 765] must be Yes.

Settings:

- **Edit**: The user can work with a student's registration information.
- **View**: The user can view but not change a student's registration information.
- **None**: The user is unable to view or work with a student's registration information.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **Edit**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Resource Assignments permission

This permission controls the user's ability to work with resource assignments [p. 354]. The assignments are recorded the Resource Roster page and on the Student Schedule page.

To work with resource assignments:

1 In the **Admin** menu, click **Scheduling**. The Scheduling page appears.
2 Under **Step 7**, click **Resource Roster**. The Resource Roster page appears.

To work with a student's resource assignments:

1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.
2 In the control bar, click **Schedule**. The Student Schedule appears.

Dependencies:

- For the user to work with a student's schedule, the setting for the *Edit Student Schedules permission* [p. 776] must be Yes.
- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.
- The user's ability to view the Resource Services page is controlled by the *Resource Services permission* [p. 726].

Settings:

- **Delete**: The user can add, edit, or delete resource assignments.
- **Edit**: The user can add or edit resource assignments but not delete them.
- **View**: The user can view but not change resource assignments.
- **None**: The user is unable to work with resource assignments. On the Scheduling page, PowerSchool SMS disables the Resource Roster link. On the Student Schedule page, the user can view a list of assignments but not the details of those assignments.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **Delete**
- Teacher: **View**
- School Health Professional: **None**
- District Health Professional: **None**

Soc/Emotional Screenings permission

This permission controls the user's ability to work with information about a student's social or emotional issues. This information is stored on the Soc/Emotional page. For more information on student health records, refer to the *PowerSchool SMS Health Tracking Guide*.

To work with information about a student's social or emotional issues:

1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.
2 In the control bar, click **Health Tracking**. The Health Profile page appears.
3 In the control bar, click **Screenings**, then **Soc/Emotional**. The Soc/Emotional page appears.

Dependencies:

- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Delete**: The user can add, edit, and delete information about a student's social or emotional issues.
- **Edit**: Same as Delete.
- **View**: The user can view but not change information about a student's social or emotional issues
- **None**: The user is unable to view information about a student's social or emotional issues. On the Student Demographics page's control bar, PowerSchool SMS does not display the Screenings link.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **Edit**
- District Health Professional: **Delete**

State Student Number permission

This permission controls the user's ability to work with the information in the State Number field in the Overview tab of the Student Demographics page [p. 56].

Dependencies:

- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.
- For the user to view the Student Demographics page's Overview tab, the setting for the *Student Overview permission* [p. 794] must be View or Edit.

Settings:

- **Delete**: The user can add, edit, and delete information in a student record's State Number field.
- **Edit**: Same as Delete
- **View**: The user can view but not change the information in a student record's State Number field.
- **None**: The user is unable to view the State Number field.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **Edit**

- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **View**
- District Health Professional: **View**

Student Address Phone permission

This permission controls the user's ability to work with a student's contact information. This information is stored in the Address/Phone tab of the Student Demographics page [p. 56].

Dependencies:

- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Edit**: The user can add, edit, and delete information in a student record's Address/Phone tab.
- **View**: The user can view but not change information in a student record's Address/Phone tab.
- **None**: The user is unable to view a student record's Address/Phone tab.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **Edit**
- Teacher: **View**
- School Health Professional: **Edit**
- District Health Professional: **Edit**

Student Federal Info permission

This permission controls the user's ability to work with the information in the Federal Info tab of the Student Demographics page [p. 56].

Dependencies:

- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.
- For the user to work with the Home Language Survey panel on the Federal Info tab of the Student Demographics page [p. 55], the setting for the *Home Language Survey permission* [p. 778] must be View or Edit.

Settings:

- **Edit**: The user can add, edit, and delete information on the Federal Info tab.

- **View**: The user can view but not change information on the Federal Info tab.
- **None**: The user is unable to view the Federal Info tab on the Student Demographics page [p. 55].

Default settings by base role [p. 246]:
- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **Edit**
- Teacher: **View**
- School Health Professional: **Edit**
- District Health Professional: **Edit**

Student Health Conditions permission

This permission controls the user's ability to work with information on a student's health conditions. This information is stored on the Edit Student Health Conditions page. For more information on student health records, refer to the *PowerSchool SMS Health Tracking Guide*.

To work with a student's health condition information:

1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.
2 In the control bar, click **Health Tracking**. The Health Profile page appears.
3 In the control bar, click **Conditions**. The Conditions page appears.

Dependencies:
- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:
- **Delete**: The user can add, edit, and delete information on a student's health conditions.
- **Edit**: Same as Delete
- **View**: The user can view but not change information on a student's health conditions.
- **None**: The user is unable to view information on a student's health conditions. On the Student Demographics page's control bar, PowerSchool SMS does not display the Conditions link.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **Edit**
- Teacher: **View**

- School Health Professional: **Edit**
- District Health Professional: **Delete**

Student Health Examinations permission

This permission controls the user's ability to work with a student's health examinations records. This information is stored on the Edit Student Health Examinations page. For more information on student health records, refer to the *PowerSchool SMS Health Tracking Guide*.

To work with a student's health examination records:

1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.
2 In the control bar, click **Health Tracking**. The Health Profile page appears.
3 In the control bar, click **Examinations**. The Examinations page appears.

Dependencies:

- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Delete**: The user can add, edit, and delete a student's health examinations records.
- **Edit**: Same as Delete
- **View**: The user can view but not change a student's health examinations records.
- **None**: The user is unable to view a student's health examinations records. On the Student Demographics page's control bar, PowerSchool SMS does not display the Examinations link.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **Edit**
- District Health Professional: **Delete**

Student Health Immunizations permission

This permission controls the user's ability to work with a student's health immunization records. This information is stored on the Edit Student Health Immunizations page. For more information on student health records, refer to the *PowerSchool SMS Health Tracking Guide*.

To work with a student's immunization records:

1   Locate and view a student record [p. 37]. The Student
    Demographics page [p. 55] appears.
2   In the control bar, click **Health Tracking**. The Health Profile
    page appears.
3   In the control bar, click **Immunizations**. The Immunizations
    page appears.

Dependencies:

• For the user to work with the student record's Student Demographics
  page [p. 55], the setting for the *Demographic Data permission* [p.
  773] must be View or Edit.

Settings:

• **Delete**: The user is able to add, edit, or delete a student's health
  immunization records.
• **Edit**: Same as Delete
• **View**: The user is able to view but not change a student's health
  immunization records.
• **None**: The user is unable to view a student's health immunization
  records. On the Student Demographics page's control bar,
  PowerSchool SMS does not display the Immunizations link.

Default settings by base role [p. 246]:

• District Administrator: **Delete**
• School Administrator: **Edit**
• School Counselor: **Edit**
• School Secretary: **View**
• Teacher: **View**
• School Health Professional: **Edit**
• District Health Professional: **Delete**

Student Health Medication permission

This permission controls the user's ability to work with a student's
medication information. This information is stored on the Edit Student
Health Medication page. For more information on student health records,
refer to the *PowerSchool SMS Health Tracking Guide*.

To work with a student's medication information:
1   Locate and view a student record [p. 37]. The Student
    Demographics page [p. 55] appears.
2   In the control bar, click **Health Tracking**. The Health Profile
    page appears.
3   In the control bar, click **Medications**. The Medication page
    appears.

Dependencies:

• For the user to work with the student record's Student Demographics
  page [p. 55], the setting for the *Demographic Data permission* [p.
  773] must be View or Edit.

Settings:

- **Delete**: The user can add, edit, and delete a student's medication information.
- **Edit**: The same as Delete.
- **View**: The user can view but not change a student's medication information.
- **None**: The user is unable to view a student's medication information. On the Student Demographics page's control bar, PowerSchool SMS does not display the Medications link.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **Edit**
- District Health Professional: **Delete**

Student Health Office permission

This permission controls the user's ability to work with records of a student's visits to the school health office. This information is stored on the Health Office page. For more information on student health records, refer to the *PowerSchool SMS Health Tracking Guide*.

To work with records of a student's health office visits:

1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.
2 In the control bar, click **Health Tracking**. The Health Profile page appears.
3 In the control bar, click **Health Office**. The Health Office page appears.

Dependencies:

- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Delete**: The user can add, edit, and delete records of a student's health office visits.
- **Edit**: Same as Delete
- **View**: The user can view but not change records of a student's health office visits.
- **None**: The user in unable to view records of a student's health office visits. On the Student Demographics page's control bar, PowerSchool SMS does not display the Health Office link.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **Edit**
- District Health Professional: **Delete**

Student Health Pregnancy permission

This permission controls the user's ability to work with a student's pregnancy tracking information. This information is stored on the Edit Student Health Pregnancy page. For more information on student health records, refer to the *PowerSchool SMS Health Tracking Guide*.

To work with a student's pregnancy tracking information:

1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.
2 In the control bar, click **Health Tracking**. The Health Profile page appears.
3 In the control bar, click **Pregnancy**. The Pregnancy page appears.

Dependencies:

- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Delete**: The user can add, edit, and delete a student's pregnancy tracking information.
- **Edit**: Same as Delete
- **View**: The user can view but not change a student's pregnancy tracking information.
- **None**: The user in unable to view a student's pregnancy tracking information. On the Student Demographics page's control bar, PowerSchool SMS does not display the Pregnancy link.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **Edit**
- District Health Professional: **Delete**

Student Health Profile permission

This permission controls the user's ability to work with a student's health profile. This information is stored on the Edit Student Health Profile page. For more information on student health records, refer to the *PowerSchool SMS Health Tracking Guide*.

To work with a student's health profile:

1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.
2 In the control bar, click **Health Profile**. The Health Profile page appears.

Dependencies:

- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Delete**: The user can add, edit, and delete a student's health profile.
- **Edit**: Same as Delete
- **View**: The user can view but not change a student's health profile.
- **None**: The user in unable to view a student's health profile. On the Student Demographics page's control bar, PowerSchool SMS does not display the Health Profile link.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **Edit**
- District Health Professional: **Delete**

Student Medical Info permission

This permission control's the user's ability to work with a student's general medical information such as emergency contacts, current status, and insurance coverage. This information is stored on the Student Demographics page's Medical Info tab [p. 63].

Dependencies:

- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.
- For the user to work with the Medical Info tab's Medical Alert field, the setting for the *Medical Alert permission* [p. 780] must be View or Edit.

Settings:
- **Edit**: The user can add, edit, and delete a student's general medical information.
- **View**: The user can view but not change a student's general medical information.
- **None**: The user is unable to view a student's general medical information. On the Student Demographics page [p. 55], PowerSchool SMS does not display the Medical Info tab.

Default settings by base role [p. 246]:
- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **Edit**
- Teacher: **View**
- School Health Professional: **Edit**
- District Health Professional: **Delete**

Student Overview permission

This permission control's the user's ability to work with a student's general information such as name, birth date, and home school. This information is stored on the Student Demographics page's Overview tab [p. 56].

Dependencies:
- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.
- For the user to work with some of the information on the Overview tab, a setting of View or Edit is required for particular permissions, including: *Modify Home School permission* [p. 781], *Photos permission* [p. 783], *Receives Specialized Services Field permission* [p. 783], *State Student Number permission* [p. 786].

Settings:
- **Edit**: The user can add, edit, and delete a student's general information.
- **View**: The user can view but not change a student's general information.
- **None**: The user is unable to view a student's information. On the Student Demographics page [p. 55], PowerSchool SMS does not display the Overview tab.

Default settings by base role [p. 246]:
- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **Edit**
- Teacher: **View**

- School Health Professional: **Edit**
- District Health Professional: **Delete**

Student Personal Info permission

This permission control's the user's ability to work with a student's general personal information such as birth certificate, citizenship, date entered the 9th Grade, and place of birth. This information is stored on the Student Demographics page's Personal Info tab [p. 60].

Dependencies:
- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.
- For the user to work with some of the information on the Personal Info tab, a setting of View or Edit is required for particular permissions, including: *Birth Certificate permission* [p. 770], *Date/Year Entered 9th Grade permission* [p. 772]

Settings:
- **Edit**: The user is able to add, edit, and delete a student's general personal information.
- **View**: The user is able to view but not change a student's general personal information.
- **None**: The user is unable to view a student's general personal information. On the Student Demographics page [p. 55], PowerSchool SMS does not display the Personal Info tab.

Default settings by base role [p. 246]:
- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **Edit**
- Teacher: **View**
- School Health Professional: **Edit**
- District Health Professional: **Delete**

Student School Specific permission

This permission control's the user's ability to work with a information specific to a student's school of enrollment, such as grade level, homeroom, and lunch status. This information is stored on the Student Demographics

page's School Specific tab   [p. 59].

Dependencies:
- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

- For the user to work with some of the information on the School Specific tab, a setting of View or Edit is required for particular permissions, including: *Distance From School permission* [p. 775], *Lunch Status Panel permission* [p. 779], *Modify Home School permission* [p. 781], *Photos permission* [p. 783]

Settings:

- **Edit**: The user is able to add, edit, and delete information specific to a student's school of enrollment.
- **View**: The user is able to view but not change information specific to a student's school of enrollment
- **None**: The user is unable to view information specific to a student's school of enrollment. On the Student Demographics page [p. 55], PowerSchool SMS does not display the School Specific tab.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **Edit**
- Teacher: **View**
- School Health Professional: **Edit**
- District Health Professional: **Delete**

Student Standardized Tests permission

This permission controls the user's ability to work with a student's standardized test results. PowerSchool SMS stores this information on the All Tests for Student page [p. 72].

Dependencies:

- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.
- This permission is effective only on a system that employs legacy tests functionality.
- Test Management is controlled by other permissions:*Define Tests - Assessment permission* [p. 799] and *Define Tests - Standard permission* [p. 800].

Settings:

- **Delete**: The user can add, edit, and delete a student's standardized test results.
- **Edit**: The user can add or edit a student's standardized test results.
- **View**: The user can view but not change a student's standardized test results.
- **None**: The user in unable to view a student's standardized test results.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **Edit**
- School Secretary: **Edit**
- Teacher: **View**
- School Health Professional: **None**
- District Health Professional: **None**

Student Test Results - Assessment permission

This permission controls the user's ability to work with test results for tests that have been assigned to the test category group "Assessment". PowerSchool SMS stores this information on the Student Test Results page [p. 74].

Dependencies:

- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Delete**: The user is able to add, edit, and delete a student's test results for tests in the test category "Assessment".
- **Edit**: The user is able to add or edit a student's test results for tests in the test category "Assessment".
- **View**: The user can view but not change a student's test results for tests in the test category "Assessment"
- **None**: The user is unable to view a student's test results. On the Student Test Results page, PowerSchool SMS does not display test results for tests in the test category "Assessment".

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Student Test Results - Standard permission

This permission controls the user's ability to work with test results for tests that have been assigned to the test category group "Standard". PowerSchool SMS stores this information on the Student Test Results page [p. 74].

Dependencies:

- For the user to work with the student record's Student Demographics page [p. 55], the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Delete**: The user is able to add, edit, and delete a student's test results for tests in the test category "Standard".
- **Edit**: The user is able to add or edit a student's test results for tests in the test category "Standard".
- **View**: The user can view but not change a student's test results for tests in the test category "Standard"
- **None**: The user is unable to view a student's test results. On the Student Test Results page, PowerSchool SMS does not display test results for tests in the test category "Standard".

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Vision Screenings permission

This permission enables users to work with students' vision health information. For more information on student health records, refer to the *PowerSchool SMS Health Tracking Guide*.

To work with information about a student's vision screenings:

1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.
2 In the control bar, click **Health Tracking**. The Health Profile page appears.
3 In the control bar, click **Screenings**, then click **Vision**. The Vision page appears.

Dependencies:

- For this permission to be effective, the setting for the *Demographic Data permission* [p. 773] must be Edit or View.

Settings:

- **Delete**: The user can add, change, or delete a student's vision health information.
- **Edit**: Same as Delete.
- **View**: The user can view but not change a student's vision health information.

- **None**: The user is unable to view a student's vision health information. On the Student Demographics page [p. 55], in the control bar, PowerSchool SMS does not display the Vision link.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **Edit**
- School Counselor: **View**
- School Secretary: **View**
- Teacher: **View**
- School Health Professional: **Edit**
- District Health Professional: **Delete**

Withdraw Student permission

This permission enables the user to withdraw a student from a school [p. 150].

Dependencies: None

Settings:
- **Yes**: The user has access to the **Withdraw** button on the Add/Edit School Enrollment page. The user can also edit a student's withdrawal end date and end status.
- **No**: The user cannot edit a student's withdrawal end date and end status.

Default settings by base role [p. 246]:
- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Test Management permissions

Permissions in this category pertain to assessment setup. These permissions include:
- *Define Tests - Assessment permission* [p. 799]
- *Define Tests - Standard permission* [p. 800]

Define Tests - Assessment permission

This permission controls the user's ability to define tests and test sessions for tests that are in the "Assessment" test category group.

To define tests:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.

2 Under **District**, click <u>Tests</u>.

Dependencies:

* If the setting for this permission and the *Define Tests - Standard permission* [p. 800] are both None, PowerSchool SMS does not display <u>Test</u> on the District Setup page.

Settings:

* **Delete**: The user can define tests in the "Assessment" test category and set up associated test sessions, subtests, skills, and score types.
* **Edit**: Same as Delete.
* **View**: The user can view but not change tests in the "Assessment" test category.
* **None**: The user is unable to view or work with tests in the "Assessment" test category.

Default settings by base role [p. 246]:

* District Administrator: **Delete**
* School Administrator: **View**
* School Counselor: **View**
* School Secretary: **None**
* Teacher: **None**
* School Health Professional: **None**
* District Health Professional: **None**

Define Tests - Standard permission

This permission controls the user's ability to define tests and test sessions for tests that are in the "Standard" test category group.

To define tests:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.

2 Under **District**, click <u>Tests</u>.

Dependencies:

* If the setting for this permission and the *Define Tests - Assessment permission* [p. 799] are both None, PowerSchool SMS does not display <u>Test</u> on the District Setup page.

Settings:

* **Delete**: The user can define tests in the "Standard" test category and set up associated test sessions, subtests, skills, and score types.
* **Edit**: Same as Delete.
* **View**: The user can view but not change tests in the "Standard" test category.

- **None**: The user is unable to view or work with tests in the "Standard" test category.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Transcript/Permanent Record permissions

Permissions in this category pertain to viewing and recording student transcripts. These permissions include:
- *Elementary Permanent Record Setup permission* [p. 801]
- *Import Historical permission* [p. 801]
- *Manually Add/Edit Historical Course permission* [p. 802]
- *Student Historical Data permission* [p. 803]
- *Transcript Columns permission* [p. 803]
- *Transcript Grade Items permission* [p. 804]
- *Transcript Options permission* [p. 805]

Elementary Permanent Record Setup permission

This permission will take effect in a future version of PowerSchool SMS.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Import Historical permission

This permission controls the user's ability to import historical years, courses, and course bins for use on student transcripts. For more information, refer to the *Chancery SMS Import/Export Guide*. To control the user's ability to schedule the import, refer to the *Schedule Import permission* [p. 685].

To import historical data [DA[1]]:

1   In the **Admin** menu, click **District Setup**. The District Setup

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[1]You can do this if your role is District Administrator.

page appears.

2 Under **Tools**, click <u>**Schedule Import**</u>.

Dependencies: None

Settings:

- **Yes**: The user is able to import historical data.
- **No**: The user is unable to import historical data. On the Schedule Import page, the user can schedule import but PowerSchool SMS only completes the task with errors.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **Yes**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Manually Add/Edit Historical Course permission

This permission controls the user's ability modify the following fields on the Add/Edit Historical Course page when using the course lookup feature :

- Course number
- State course ID
- Course name
- Subject area
- Alternate name
- Short name
- Course type
- Course level

Settings:

- **Yes**: The user can edit these fields.
- **No**: The user can view but not change these fields.

Default settings by base role [p. 246]:

- District Administrator: **Yes**
- School Administrator: **Yes**
- School Counselor: **No**
- School Secretary: **No**
- Teacher: **No**
- School Health Professional: **No**
- District Health Professional: **No**

Student Historical Data permission

This permission controls the user's ability to work with a student's historical years and historical courses. For more information, refer to the *Chancery SMS Grading Setup Guide*.

To work with a student's historical years and courses:

1 Locate and view a student record [p. 37]. The Student Demographics page [p. 55] appears.
2 In the control bar, click **Historical**.

Dependencies:

- For this permission to be effective, the setting for the *Demographic Data permission* [p. 773] must be View or Edit.

Settings:

- **Delete**: The user can add, edit, or delete a student's historical years and courses.
- **Edit**: The user can add or edit a student's historical years and courses.
- **View**: The user can view but not change a student's historical years and courses.
- **None**: The user is unable to view a student's historical years and courses.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **Delete**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Transcript Columns permission

This permission controls the user's ability to specify the columns displayed on the district's standard student transcript. This information is stored on the Transcript Columns page. For more information, refer to the *Chancery SMS Grading Setup Guide*.

To work with district transcript's columns:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Transcript Options**, click <u>Transcript Columns</u>. The Transcript Columns page appears.

Dependencies: None

Settings:

- **Delete**: The user can change the columns specified.
- **Edit**: The user can change the columns specified.
- **View**: The user can view but not change the columns specified.
- **None**: The user is unable to view the transcript columns specified. On the District Setup page, PowerSchool SMS does not display the Transcript Columns link.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Transcript Grade Items permission

This permission controls the user's ability to define grade items for use on a school's transcripts. For more information, refer to the *Chancery SMS Grading Setup Guide*.

To define grade items [SA[1]]:

1 In the **Admin** menu, click **School Setup**. The School Setup page appears.
2 Under **School**, click **Transcript Grade Items**.

Dependencies:

- This permission applies only to a user whose role's scope is at the school level [p. 240].

Settings:

- **Delete**: The user can add, edit, or delete grade items.
- **Edit**: Same as Delete
- **View**: Same as Delete
- **None**: Same as Delete

Default settings by base role [p. 246]:

- District Administrator: **None**
- School Administrator: **Delete**
- School Counselor: **Delete**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

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[1]You can do this if your role is School Administrator.

Transcript Options permission

This permission controls the user's ability to specify information to be displayed on the district's standard student transcript. This information is stored on the Transcript Options page.

To work with district's standard transcript:

1 In the **Admin** menu, click **District Setup**. The District Setup page appears.
2 Under **Transcript Options**, click <u>Transcript Options</u>. The Transcript Options page appears.

Dependencies: None

Settings:

- **Edit**: The user can change the information to be displayed on the district's standard student transcript.
- **View**: The user can view but not change the information to be displayed on the transcript.
- **None**: The user is unable to view the information to be displayed. On the District Setup page, PowerSchool SMS does not display the Transcript Options link.

Default settings by base role [p. 246]:

- District Administrator: **Edit**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **View**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Users permissions

Permissions in this category pertain to management of system user accounts [p. 236]. These permissions include:

- *User Accounts permission* [p. 805]
- *User Roles permission* [p. 806]

User Accounts permission

This permission controls the user's ability to manage system user accounts [p. 236].

Dependencies:

- The accounts to which a user has access depends on the scope of his or her role [p. 240]; for example, a School Administrator has access to user accounts of users associated with his or her school.

Settings:

- **Delete**: The user can add, edit, and delete user accounts. The user can assign a role to an account or remove a role from an account.
- **Edit**: The user can add or edit, but not delete, user accounts. The user can assign a role to an account or remove a role from an account.
- **View**: The user can view but not change user accounts. The user can assign a role to an account or remove a role from an account.
- **None**: The user does not have access to user accounts. On the District Setup page, PowerSchool SMS does not display the Account link.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **None**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

User Roles permission

This permission controls the user's ability to add, edit, or delete roles [p. 242], including adjust the permissions for any role see *Role permissions* [p. 246]. If the user's base role is that of District Administrator, this permission controls the user's ability to adjust the permission for any base role [p. 246].

Dependencies:

- The roles to which a user has access depends on the scope of his or her role [p. 240]; for example, a School Administrator has access to roles of users associated with his or her school.

Settings:

- **Delete**: The user can add, edit, and delete roles (and base roles, where the user is a District Administrator).
- **Edit**: The user can add or edit, but not delete, roles.
- **View**: The user can view but not change roles.
- **None**: The user does not have access to roles. On the District Setup page, PowerSchool SMS does not display the Roles (and Base Roles) link.

Default settings by base role [p. 246]:
- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **None**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

User Settings permissions

Permissions in this category pertain to a user's customization of his or her views of the data [p. 24]. These permissions include:

- *Global Grid View permission* [p. 807]

Global Grid View permission

This permission controls the user's ability to define global grid views [p. 24] to which all system users have access.

Dependencies: None

Settings:

- **Delete**: The user can add, edit, and delete global grid views.
- **Add**: The user can add or edit, but not delete, global grid views.
- **View**: The user can view but not change the global grid views that are available to all system users.
- **None**: The user is unable to define global grid views.

Default settings by base role [p. 246]:

- District Administrator: **Delete**
- School Administrator: **View**
- School Counselor: **View**
- School Secretary: **None**
- Teacher: **None**
- School Health Professional: **None**
- District Health Professional: **None**

Permanent Record

In PowerSchool SMS, a District Administrator can use *Permanent Record* (PR) features to create a district-specific structure for secondary schools that defines the student data stored in a student's permanent record, specifies which data should be included in cumulative GPA and credit calculations, and determines which information is shown on secondary student transcripts.

For detailed information, consult the PowerSchool SMS *Permanent Record Guide*.

Database conversion

To use Permanent Record features, the administrator must convert the PowerSchool SMS database to accommodate them. For detailed information, refer to *Converting to Permanent Record*.

The *Permanent Record Tool* facilitates this conversion by helping the District Administrator configure the schools prior to conversion and ensure the data is correct so that it synchronizes accurately.

 Permanent Record Tool (537 KB)

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