

AT THE DISTRICT OFFICE

1. **Verify & Update District Information**-Start Page>Setup, District>District Information, District Info
This is where the District Address, Superintendent & Technology Director Contact Information is located and may be updated if needed.

- Verify District Address
- Verify Superintendent Information
- Verify Technology Director Information

2. **Verify Schools/School Information** - Start Page>Setup, District>Schools/School Info
Updates can be made here for each school/building, this includes information for the School Building, Principal, Assistant Principal, Secretary, Disciplinarian and Registrar.

Click on each blue hyperlink for each active building.

- Verify School/Building Information
- Verify & Update Administration Information, such as New Principal, Assistant Principal, Attendance Secretary, Disciplinarian, or Registrar.
- Verify School Fee Information (See Appendix Bng)
- Verify & Update Ohio State Information (EMIS staff only)
 - DN Information
 - Education Delivery Model @ District Level & School Level
 - PBIS Stage
 - PBIS Months
 - DN PhsEd Table

3. **Miscellaneous** - Start Page>Setup, District>District Information
 - o Update the Default Term Level

The default term level setting determines which term level is displayed at the top of the PowerSchool pages. It also controls the term teachers see in PowerTeacherPro. (In order for the new term level to be displayed, you must sign out of PS and sign back in.)

4. **Code Sets** - Start Page> Setup, District>Code Sets- select EntryCode from the drop down, verify, then select ExitCode, verify.
 - o Verify Entry and Exit Codes copied over to the new year.
No changes from the previous year are currently required by ODE.
5. **Federal Ethnicity & Race Settings** - Start Page> Setup, District>Identity
 - o Verify Ethnicity Codes copied over to the new year.
No changes from the previous year are currently required by ODE.

AT EACH BUILDING/SCHOOL

6. **PowerLunch (if applicable)** - Start Page > PowerLunch > Set Prices and Options
 - (If using) Review PowerLunch Prices and Options
7. **Bulletin (if applicable)** - Start Page > Special Functions > Daily Bulletin Setup
 - (If using) Update the School Bulletin
 - Note that the Daily Bulletin was cleared as part of the End of Year Process.
8. **Substitute Sign-In (if applicable)** - Start Page > School Setup > Sub Sign In Settings
 - (If using) Set Up Sub Sign In Settings

School/Building Specific (If you elect to include the current date as a prefix to the password that was entered in the Substitute Sign In Password field, the number for each day is the prefix to the password entered and changes daily. For example, if the password is sub, and the current day's date is 10/25/2023, the substitute password for today would be **25sub.**)

9. Scheduling

- Review Years and Terms -Start Page > Setup, School >Scheduling, Years & Terms
- Review Periods - Start Page > Setup, School > Scheduling, Periods
- Review Cycle Days - Start Page > Setup, School > Scheduling, Days
- Review Bell Schedules - Start Page > Setup, School > Calendaring, Bell Schedules
- Complete Calendar Setup - Start Page > Setup, School > Calendaring, Calendar Setup

10. Attendance

- Review Attendance Codes - Start Page > Setup, School > Attendance, Attendance Code
- Review Attendance Code Categories -Start Page > Setup, School > Attendance, Attendance Code Categories
- Review Attendance Conversions
 - Start Page > Setup, School > Attendance, Attendance Conversions
 - Click on "defined" for full time FTE's and make sure Day Attendance Values are complete.
- Review Full Time Equivalencies (FTE)
 - Start Page > Setup, School > Attendance, Full Time Equivalencies (FTE)
 - Click on the Name of each FTE set up and make sure they are complete.
- Review Attendance Preferences - Start Page > Setup, School >Attendance, Preferences

AT THE DISTRICT OFFICE

11. Grading and Assessment

- Review GPA Calculations - Start Page>Setup, District>Grading, GPA Calculations>GPA Calculation methods

Review the GPA calculations setup at the district for any term-specific information. For instance, a GPA calculation may be set up to only include grades from a certain school year. If you wish to use the same GPA calculation for the current year, you may have to adjust the school year settings for that GPA calculation, or create a new GPA calculation. The majority of schools use a “projected” calc method for current year GPA displays. Make sure the year field is set to 2023.

- Review PowerTeacher Pro Settings - Traditional Grade Calculation Formulas
Start Page>Setup, District>Grading, PowerTeacher Pro Settings>Grade Calculations, Traditional Grade Calculation Formulas (Click on each blue hyperlink for each building.)

AT EACH BUILDING/SCHOOL

12. Final Grade/Reporting Term Setup

- Complete Final Grade Setup - Start Page>Setup, School>Grading, Final Grade/Reporting Term Setup

Set up final grade reporting terms for each school. Final grades define the length of each grading period for a particular scheduling term. The start date and end date of a grading term determines which grade book scores (assignments, tests, projects, etc.) are included in a particular final grade.

If giving exams, make sure you end Q2 a couple of days prior to semester end, and set your exam bucket for those days so term weighting works correctly.

Example: **S1**=8/22/2023-1/10/2024, **Q2**=11/1/2023-1/8/2024, **E1**=1/9/2024-1/10/2024

This will permit term weighting to work correctly. Likewise you would have to do this for Q4. If you have quarter length classes with exams, you will have to do this for all quarters. Be sure to work with your administrators to set final grade deadlines once final grade setup is complete.

****Final Grade/Reporting terms must be created in order to automatically appear on the Quick Lookup pages, PowerSchool Mobile, and PowerSchool Student and Parent portals.**

13. **Current Grade Display** - Current Grade Display settings control the grade display on the Quick Lookup student screen as well as the current grade display throughout PowerSchool. The following settings should be updated at the end of each reporting term throughout the school year:

- Update the Active Term -Start Page>Setup, School>Grading, Current Grade Display Active Term is used for the GPA on Quick Look-up and is the default term for current gradebook grades when a term is not specified.
- Start Page>Setup, School>Grading, Current Grade Display, Select the blue hyperlink [Quick Lookup Preferences](#) to select how grades are displayed on the Quick Lookup screen
- Update the source of data for each column so that grades are initially returned from the grade book (current grades) instead of Historical (stored) grades
- Use the checkboxes to enable the display of the grades on the Parent/Student portal, Teacher portal, and Admin side.
- Update the Parent/Student Access Term field, will need to be set to 23-24.

14. **GPA Student Screens** - Update GPA Student Screens - Start Page>Setup, School>Grading, GPA Student Screens

The settings on the GPA Student Screens setup page determine which GPA calculation method is used for the current GPA on the Quick Lookup student screen and which data is displayed on the Cumulative Information student screen.

Verify the following settings at the start of the school year:

If needed, update the GPA calculation method to be used as the current GPA on the Quick Lookup student screen

Review any of the data access tags used in each of the 10 rows for the Cumulative Information student screen

If needed, update any term-specific data access tag attributes
This is common with data access tags related to attendance and GPAs.

15. **Honor Roll** - At the start of the school year, review the GPA Calculation associated with each honor roll level and ensure that the calculation is configured properly for the current school year.

Verify honor roll methods and levels at each school. The grades included in the honor roll calculations are based on the associated GPA calculations setup at the district office.

- Review Honor Roll Levels - Start Page>Setup, School>Grading, Honor Roll

16. **Class Rank** - Start Page>Setup, School>Grading, Class Rank

- Review Recalculation Frequency – It is recommended the frequency be set to either daily (updates rank with any new historical move in information nightly) or with the storing of grades.

At the start of the school year, review each class rank method and ensure each is associated with the correct GPA calculation method.

- Review Class Rank Methods Start Page>Setup, School>Grading, Class Rank

Configure class rank methods at each school. Class rank is used to rank students based on GPA. Setting up class rank involves selecting or setting up a GPA calculation method at the district, defining a class rank method at the school and calculating the class rank at the school.

17. **Reports** - **Object reports, form letters, and report cards** are all user-definable reports that often contain term or year-specific information in data access tags.

At the start of the school year, review the elements used in each report to ensure any term specific information has been updated for the current school year or the current term if you wish to use that report during the new school year.

Start Page>Reports, System Reports>Setup tab

- Update DATs (term or year-specific information) in User Defined Reports

Example: The ^(*gpa) data access tag can be used in a report card footer to return a student's GPA based on a specific method. It is possible to specify a year in which to query grades for the GPA calculation.

If any of your reports include the ^(*gpa) data access tag with a year parameter, update the year value accordingly for the upcoming school year.

The following instance of the ^(*gpa) data access tag will return a GPA value using the "Simple" method and will only include grades from the 2023-2024 school year.

`^(*gpa method="simple" year="2023")`

- (If using) Update Reporting Segments - Start Page > Setup, School > Calendaring, Calendar Setup

18. Student Information

- Pre-register Students - Start Page > People, Enroll New Student
Use your 1st day of school as enrollment
- Schedule Pre-registered Students - Start Page > Search for the Pre-registered student, select Modify Schedule.
Search for Pre-registered students: /enroll_status=-1
- Update Missing Student Information (FTE, Gender, Ethnicity, SSID)
Search for missing FTE: FTEID=
Search for missing Gender: Gender=
Search for missing Ethnicity: Ethnicity=
Search for missing SSID: State_StudentNumber=

For example, Search for students without a full-time equivalency. If any students are returned, update their current school enrollment on the Transfer Info student screen with an FTE. Students without an FTE will cause invalid ADA calculations.

Review student records periodically for blank or invalid values in commonly required fields. Student records with missing information may often lead to unexpected results in various PowerSchool reports and EMIS reporting.

19. State/Province - OH - Verify & Update the following State tabs.

Home Tab

Building IRN
Assessment Type

FD Tab

State Grade Level Equivalent
Local Attendance Pattern

FN Tab

Grade Level, Next Year
Fiscal year student began 9th grade
Reading Diagnostic Result Code (Young 5's - 3rd)

FS Tab

Verify District Entry Date (Admission Date)
Verify Admission Reason
Verify Admit From IRN
Verify County of Residence

- Verify School Enrollments - Start Page>Reports, System Reports, System tab, Membership and Enrollment, School Enrollment Audit
- Middle School Courses for High School Credit

NWCA realizes there is no single uniform practice in place, as schools handle this situation differently. Check to make sure Middle School courses taken for High School credit are pulling correctly to the HS transcript. Make sure these courses were stored with potential credit, earned credit, and a credit type that pulls to the transcript. Some school set ups will pull a historical grade from a Grade 7 or 8 course to the transcript, while other schools change Grade 7 or 8 to a historical grade of "9" in order to pull it to the transcript. You need to check your transcript coding for set up and for credit hours to make sure you are pulling credit value as per historical grade levels for all courses.

- Enroll Students in Activities - Start Page > Search for the student > Activities

To enroll a group of students in an activity:

Start Page > Select a group of students > Group Functions > Student Field Value

1. Enter the field name associated with the activity as the Field to Change.
2. Enter 1 as the New Field Value.
3. Click Submit.

20. Access to PowerSchool Student and Parent Portals

After completing a school year, it is common for PowerSchool administrators to disable student and guardian access to the PowerSchool Student and Parent Portals while school is not in session (during the summer months). Use the ID/Password Assignment group function to generate username and passwords for parents and guardians, and to enable parent and guardian access to the Parent Portal for the upcoming school year.

For districts using the single sign-on feature, it is NOT necessary to recreate web id's and passwords for parents/guardians. [Doing so will cause duplication, confusing emails to users and countless phone calls to the school!](#) If users report that they cannot get into the portal, simply direct them to the "Having trouble signing in?" link.

Enable Parent and Student Web Access to the Public Portal

Note: A value of 1 in these fields means enabled, and a value of 0 means disabled.

1. Select the students that you want to enable Parent and Student web access for from the Student Search Page.
2. Select from the "Select a function for this group of students" at the bottom of the page the function of Student Field Value.
3. In the Field To Change enter AllowWebAccess

4. In the New Field Value enter a 1, and click submit.
5. This will take you to a confirmation screen with a warning on it of WARNING: This change is irreversible. Click submit at the bottom and the Parent Web Access will be enabled.
6. Click on the cookie crumb above with the name of Student Field Value.
7. In the Field To Change enter Student_AllowWebAccess
8. In the New Field Value enter a 1, and click submit.
9. This will take you to a confirmation screen with the following message - WARNING: This change is irreversible. Click submit at the bottom and the Student Web Access will be enabled.

21. Verify School Entry Date on Modify Info Screen

For the new 23-24 PowerSchool students, the entry date should be your first day of school. (IE: should match Years and Terms start date)

The School Entry Date represents the first date a student was physically attending classes in a specific school building. This date does not represent the first day of the school year. The initial School Entry Date was set to the first day of the school year we were importing into per vendor import recommendations. Setting this date to that first day allowed all the PowerSchool functions to work. That date must be equal to or before the first transfer info record in order for all to work properly. What this means, if a student did not change buildings, the School Entry date remains the same. If a student changes buildings though, the School Entry date should be changed to reflect the first day the student is attending in the new building. The date does not change during EOY. If a student enrolls after the first day of the school year, that School Entry date should match their admission date on the Transfer Info record.

For districts needing to modify this date: **Caution should be used as it may have an affect on the student schedules records, calendars...** If you made a change to your years and terms which affect this – please review this wiki document:

[How to Add Days to the Current School Year](#)

Select the group of students (possibly by grade level) > Student Field Value > Fields to Change: SchoolEntryDate > New Field Value: (enter first day of school) > Submit. Verify that the changes you are about to make are correct and hit Submit again.

22. Assign Lockers and Locker Combinations (if applicable) - See Appendix A

23. Printing schedules for the upcoming school year:

If printing schedules for the upcoming school year

Select your school > system reports > set up tab > report cards > find your schedule report and open it > click on schedule listing > look for the check box that says "print future schedules".
This needs to be unchecked after EOY.

Appendix A

How to Import Locker Information

To obtain a list of students...From the school start page select students

Start Page

The screenshot shows the PowerSchool Start Page interface. At the top, there are dropdown menus for 'Students' and 'All', followed by a search bar with a magnifying glass icon and a help icon. Below this is a filter bar with buttons for '6', '7', '8', 'F', 'M', and 'All'. The '7' button is highlighted. There is also a checkbox for 'Include Remote Enrollments' which is currently unchecked. Below the filter bar are links for 'Stored Searches', 'Stored Selections', 'View Field List', 'Advanced', and 'MultiSelect'. A 'Current Selection' section shows a 'Clear All' button and a 'Grade Level: 7' button with a close icon. The main area is titled 'Current Student Selection (89)' and contains a table with two columns: 'Student' and 'Grade Level'. The 'Student' column is mostly obscured by a blue rectangle, while the 'Grade Level' column shows the number '7' for each of the 89 rows. At the bottom right of the table area, there are buttons for 'Select By Hand', 'Quick Export', and a dropdown arrow.

Using the Group Functions > Quick Export > Select Fields

Examples:

Last_Name

Student_Number

Locker_Number

Locker_Combination

Click Submit

Save to the computer. (File needs to be saved as a Text(Tab Delimited))

Start Page > System Administrator > Page and Data Management > Quick Export

22-23 Year ▾

Quick Export

Export the 89 selected students

Last_Name
First_Name
Student_Number
Locker_Number
Locker_Combination
Grade_Level

Field Delimiter

Tab ▾

Record Delimiter

CR ▾

"Surround Fields"

Column titles on 1st row

Export DCID

Fields

Submit

School Level > Start Page > Special Functions > Importing & Exporting > Quick Import

On this page, choose the Students Table

Leave Field delimiter and end-of-line marker alone

Change “Character Set” to match your computer. (Windows ANSI or Mac Roman)

File to Import: click Browse and find your file in Excel. (File needs to be saved as a Text(Tab Delimited)

Suggest field map needs checked

Press Import

See example:

Quick Import

Option	Value
Table:	Students
Field delimiter:	Tab
End-of-line marker:	CR
Character Set:	Windows ANSI
File to import:	<input type="button" value="Browse..."/> Copy of Locker to be imported.txt
Suggest field map	<input checked="" type="checkbox"/>
School	Bayshore Trail High School

Once you press Import, the following page appears. Your field names should match – from your file and to PowerSchool. Uncheck/or leave blank “Check to exclude first row”. Change the selection on the bottom half to Update the student’s... Then press **submit**.

Start Page > Special Functions > Importing & Exporting > Import Using Template > Import Records from an ASCII Text File

Import Records from an ASCII Text File

Col#	From your file	----->	To PowerSchool
1.	Student_Number	----->	Student_Number
2.	Locker_Number	----->	Locker_Number

Check to exclude first row

The lines below can be used to assign a constant value to field(s) in all of the imported records.

----->
 ----->

Advanced Import Options

Note: The student number is required in all import files. All information is keyed off of the student number field.

If the file being imported contains a student number that matches a student number already in the PowerSchool system, how would you like it handled?

- Do not process that line from the file being imported.
- Update the student's record with the information from the file being imported (Note: even if you have this option selected, if the student is in a different school, the information will not be updated).
- Generate a new, unique student number for the student (from the range specified below) and import the data from the import file.
 - New student numbers are generated at random from within this range: 10000 to 99999
- Synchronize Mode (Warning: This will transfer out all Students who are not found in the file being imported. Do not use this unless you know exactly what you are doing!)
- Allow Update of Enrollment Status (Warning: Don't use this unless you know exactly what you are doing!)

This import process takes a little bit of time. Wait until it is finished before you leave the page.

Once finished, look at the Student's Modify Information Page to check Locker Number and Locker Combination.

APPENDIX B

If your district uses PowerSchool's fee system, review your district's School/Building Enrollment Fees and Course Enrollment fees.

At the District Office

Enrollment Fees

Verify Schools/School Info Verify Assessment of Automatic Fees - Start Page>Setup, District>Schools/School Info

- o School Enrollment Fees - Update as needed

School Fee Information

Fee Exemption Status	Students Not Exempted
School Enrollment Fees	New
Fee Type	Amount
EMS School Fee	\$14.00

NOTE: If your school wishes to delay the assessment of school and/or course enrollment fees, set the field “Fee Exemption Status” to Students Exempted From (course, school, or all) fees. This will prevent all students in this school from being assessed during the enrollment process or when courses are added to the schedule. When the school is ready to begin assessing fees, this field can be changed back to “Students Not Exempted”.

At each School/Building

School/Building Enrollment Fee

School enrollment fees are used to automatically assess certain fees at the beginning of the year for the whole building/school or when a student enrolls in that building/school, such as computer fee or a set School Fee of \$50 per student, for the whole building. Before adding school enrollment fees, fee types must be created using the fee category of **School**.

Check your Fee Types (Review existing or add new) - School Start Page > School > Fee Types

Adding an Enrollment Fee

1. On the start page, choose **District** under Setup in the main menu.
2. Under District Information, click **Schools/School Info**.
3. Click the name of a school.
4. In the School Enrollment Fees section, click **New**.
5. Choose the **Fee Type**. Only those fee types with the fee category of School appear.
6. Choose the department with which you want to associate the fee.
7. Enter the amount of the fee to be assessed.
8. Enter the date the fee becomes applicable.
9. Select **Proratable** to indicate that the fee is to be assessed based on the number of school days in the year. If a student enrolls in school after the start date or withdraws from school before the end date, the student will only be charged for that portion of the school year.
10. Click **Submit**.

To edit a School Enrollment Fee, select the fee type you want to update, edit the information as needed, and click **Submit**.

To delete a School Enrollment Fee, select the fee and click **Delete**.

When importing students, school enrollment fees are not automatically assessed. You must manually assess school enrollment fees using Fee Functions.

School/Building Course Fee

Course enrollment fees are used to automatically assess certain fees when a student enrolls in a course, such as Textbook, Materials, etc. When creating course enrollment fees, you can indicate whether you want the fee to be proratable.

When importing students, course enrollment fees are not automatically assessed. You must manually assess course enrollment fees using Fee Functions.

Manage Course Enrollment Fees

Before adding course enrollment fees, fee types must be created or verified as having the fee category of **Course**.

Check your Fee Types (Review existing or add new) - School Start Page > School > Fee Types

1. On the start page, choose **School** under Setup in the main menu.
2. Under General, click **Courses**.
3. Click the Number, Name, or Department of a course.
4. Click the **Fees** tab.
5. Click **New**.
6. Choose the **Fee Type**. Only those fee types with the fee category of Course appear.
7. Choose the name of the department with which you want to associate the fee.
8. Enter the amount of the fee to be assessed.
9. Enter the date the fee becomes applicable.
10. Enter an explanation of the fee.
11. Select **Proratable** to indicate that the fee is to be assessed based on the number of days within the term for the course section. If a student enrolls in the course after the start date or drops the course before the end date, the student will only be charged for that portion of the course.
12. Click **Submit**.

To edit a Course Enrollment Fee, select the fee you want to update, edit the information as needed, and click Submit.

To delete a Course Enrollment Fee, select the fee you want to delete and click **Delete**.

Assessing Fees

If fees do not assess automatically, they can be assessed manually (*by group or all*):

Start Page > Special Functions > Fee Functions > Assess School Enrollment Fees > Submit
AND...

Start Page > Special Functions > Fee Functions > Course Enrollment Fees > Submit

- Verify Assessment of Automatic Fees – Spot check student fees
- Note: Helpful search command: *Enrolled_in=[course] e.g. *Enrolled_in=ART2100
- Assess any other fees

Assigning Other Fees

Add Student Fees for Group of Students

Using the Fee Functions page, you can manually assess a group of students with student fees, such as student dues, Field Trip, etc. . Be sure the information you enter is accurate, as there is no edit or delete function for student fees (to preserve the history of the transaction). If you inadvertently make a mistake, you will have to create a transaction using payment, credit, or void to reverse the effect.

You can also manually assess an individual student with student fees.

1. On the start page, search for and select a group of students.
2. Click the **[Select Function]** arrow.
3. Under Functions, choose **Fee Functions**.
4. Click **New Fee**.
5. Select the **Fee Type**.
6. Choose the department with which you want to associate to this fee if any.
7. Enter the date the student fee is to be assessed.
8. Enter an explanation for the fee.
9. Enter the **Amount of Fee**.
10. Enter the **Amount of Credit**, the **Payment Method**, and the **Payment Reference Number** if the students are providing full or partial payment at the time this fee is being created. If the students' payment is greater than the fee, the extra money will be applied as payment to other unpaid fees based on fee type priority.
11. If this fee is related to a course, enter the **Course Number**.
12. Click **Submit**.