

# ***PowerSchool Student Information System Scope of Work***

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## Purpose of Document

The purpose of this Scope of Work (SOW) is to outline the process, approach, and completion criteria for each step of the process to implement PowerSchool Student Information System (SIS). This document covers the roles and responsibilities of the PowerSchool Implementation Specialist and customer in each step of the PowerSchool implementation process, serving as an outline of services PowerSchool is expected to deliver. This SOW calls out specific functional areas of PowerSchool that are covered for implementation services and level of coverage.

Successful implementation of new software requires proven project management and methodology. PowerSchool provides a comprehensive package of services delivered by an experienced team of education experts, designed to ensure your PowerSchool deployment project meets your unique needs and expectations. This Scope of Work represents our standard implementation services only. Additional training, consulting and customization services can be purchased to help augment additional needs you may have with your PowerSchool deployment.

We will partner with you and be your liaison to PowerSchool during the implementation. Your implementation specialist is a single contact to help you, as a customer, connect to other PowerSchool services and support, while also providing project planning, communication, project execution, and product specialist consulting. For a successful PowerSchool implementation, it is important that you understand the responsibilities, carve out the time required and keep on pace with the timeline. This will involve gathering information, helping your team come to agreement on configuration and data standardization, your own product training and monitoring other staff assigned training for completion, adjusting desk level procedures, and planning for go live among several other tasks.

This Scope of Work is subject to the terms and conditions of the current master agreement between the parties and any associated policies, pursuant to which PowerSchool Group LLC ("PowerSchool") has licensed the PowerSchool application to Customer.

## Customer Critical Responsibilities

- Identify customer project lead to work with PowerSchool implementation specialist.
- Attend initiation meeting and any subsequent meetings and training required.
- Plan for training and ensure users attend Instant Productivity Training, Distance Learning and Advanced training as needed.

## Completion Criteria

This activity will be considered complete when:

- Customer signs off on Scope of Work

## Configuration Collection

### Customer Critical Responsibilities

- Complete the PowerSchool Configuration Survey based on information gathered from key stakeholders.
- Provide supporting documents as required (i.e. report cards, grade scales, standards, etc.).
- Consult with customer stakeholders and provide answers to follow-up questions regarding configuration elements.
- Extract data from legacy system into PowerSchool provided templates
- Notify PowerSchool at [ClassroomServices@PowerSchool.com](mailto:ClassroomServices@PowerSchool.com) you are ready for an implementation specialist to begin configuration.

### Completion Criteria

This activity will be considered complete when:

- Configuration collection, associated documentation and data templates are complete and provided to PowerSchool.

# System Settings

## PowerSchool Configures Critical System Settings:

- Browser Time Out
- Email Setup
- Mobile App Settings
- Password Rules Management
- PowerSchool Licensing
- ReportWorks Administration Settings
- Select Student Options

# District Configuration

## PowerSchool Configures District Settings

*(\* indicates this item will be configured in Basic Model only if required by compliance)*

- District Info
- District Setting Require by State
- Districts of Residence (compliance)
- Years & Terms
- Miscellaneous
- Calendar Membership Types
- Citizenship Codes
- Entry Codes
- Exit Codes
- Scheduling/Reporting Ethnicity Codes
- Federal Ethnicity and Race Settings
- \*Special Programs

### Grade Scales

- GPA Calculations
- Schools/School Info

### Standard

- \*Log Types/Subtypes
- \*Log Entry Fields
- Test Scores (up to 4 tests)
- District Standards & grading configuration
- Graduation Planner

### Advanced Model

- Health
- Incident Management

# School Configuration

*(Basic/Standard model 1 school year – Advanced current and go live year)*

## PowerSchool Configures School Settings

- Years and Terms
- Days
- Periods
- Final Grade Setup
- Preferences
- Attendance Code Categories
- Attendance Codes
- Full-Time Equivalencies
- Attendance Conversion
- Bell Schedules
- Calendar Setup
- Miscellaneous Default Settings
- Current Grade Display
- Mobile Settings
- Sub Sign-In Settings
- Class Rank - only for high schools
- Honor Roll
- GPA Student Screens
- \*Reporting Segments

## Completion Criteria

This activity will be considered complete when:

- The standard PowerSchool configuration elements have been configured and reviewed for system, district and school setup.
  - **First Login and Overview of Configuration – approximately 1-hour session**
- Customer sign off on configuration phase.

# Guided Data Migration

## Objectives

Item(s)	Approach
Guided Data Migration Process Review	PowerSchool will provide standard import templates and provide assistance with understanding and use of the templates and importing tools
Data Mapping and Import Template Review meeting	PowerSchool will conduct a meeting with the customer to review the standard import templates to assure that proper fields and data types are used.  Note: For public/charter needs, PowerSchool will help customer understand the required and available data that will need to be mapped to PowerSchool varied compliance solutions to allow importing.
Data Importer Review Meeting	PowerSchool will conduct a meeting with the customer, to review the basic data importing functionality in PowerSchool.
Standard Data input interface review meeting	PowerSchool will offer basic assistance and guidance with PowerSchool functionality that allows front-end data entry for scope-based data elements if electronic data is not provided or as needed.
Data Validation	PowerSchool will conduct a meeting and provide documentation to the customer on PowerSchool functionality that will help the customer validate data in PowerSchool. All final data validation will be driven and confirmed by the customer.
Compliance Configuration (varied for public & charter only)	PowerSchool project manager will provide a compliance import template for importing required compliance student, staff, courses, or other data required by compliance reporting. PowerSchool project manager will assist customer in importing compliance data. PowerSchool project manager will review compliance data validation and methods for fixing data problems.

NOTE: PowerSchool is NOT responsible for data extraction or conversion of data from legacy systems.

Data conversion services are available for purchase for limited legacy student information systems (please consult your Project Manager or Sales). Data conversion services cover the extraction and preparation of legacy student information systems data elements into import-ready format.

When data services are purchased, the customer will remain responsible for the import and validation of converted data elements as defined in the process listed below

## Approach – Standard Imports

During PowerSchool implementation, PowerSchool will work with the customer on the following initial data items:

- Student Demographics (Active students only unless inactive students are a documented requirement for state reporting purposes.)
- Staff (including administrative staff and teachers)
- Courses • Sections (Master Schedule)
- Section Enrollments (Student Schedules)
- Historical Grades (current high school students only up to 5 years of history)
- Test Scores (as needed for HS transcripts only)
- State Report data elements (based on availability of customer data, PowerSchool available fields and PowerSchool state reporting documentation)
- Attendance Summary (only applicable for mid-year production cut over)

## Approach – Advanced Imports

During PowerSchool implementation, PowerSchool will work with the customer on the following additional/advanced data items if needed:

- Comment Bank
- Standards (small subset to provide knowledge transfer)
- Special programs (if required by compliance solution)
- Health (if required by compliance solution)

Customer involvement in the guided data migration process is required since it ensures that data is properly reviewed and confirmed throughout the migration by individuals who are familiar with the data. Successful data migration to PowerSchool is reliant upon regular review of data prior to, during, and after the migration of data to PowerSchool.

PowerSchool has created a well-defined and vetted data migration methodology that encompasses four steps:

- **Data Extraction** - As part of the data extraction process, the customer will identify all electronically available data. The PowerSchool project manager will make best practice recommendations on how to identify data condition and the best approach for data conversion.
- **Data Preparation** - During the data preparation process, the PowerSchool project manager and the customer will conduct a data mapping and template readiness meeting for one school. The customer will prepare PowerSchool provided import templates with data for one school. PowerSchool will then assist the customer with the validation of the populated import templates to assure proper fields and data types are used.
- **Data Import** – Once the import templates are prepared and validated, the PowerSchool project manager will, as part of the data import process, guide the customer through the PowerSchool importer to import data into PowerSchool.
- **Data Validation** - Once data is imported into PowerSchool, the PowerSchool project manager will provide documentation and best practice for validating data in PowerSchool using reporting and visual methods. The customer will have final responsibility for the validation and confirmation of accuracy of their data.



Once the data migration process has occurred for one school with PowerSchool project manager consultation, the customer will complete all remaining schools with guidance from the PowerSchool project manager as needed.

If the customer does not have any electronic data, then the PowerSchool project manager will make best practice recommendations on collecting and entering the data either directly into PowerSchool or into the PowerSchool import templates as provided by the PowerSchool project manager.

## **Customer Critical Responsibilities**

- Extract and convert required data from customer legacy system to PowerSchool provided import templates and format (Data conversion and import services are available for additional purchase).
- Consult PowerSchool state reporting documentation for data requirements and format.
- Attend data mapping and template readiness and data importer review meetings.
- Validate and fix all data in import files prior to importing as needed.
- Import all required data.
- Consult with the PowerSchool project manager, as needed, for any questions regarding the import processes.
- Attend standard data input interface review meeting to allow for direct entry into PowerSchool as required (if data is not available to import or convert).
- Validate data in PowerSchool and obtain concurrence from key school stakeholders.

## **Completion Criteria**

This activity will be considered complete upon:

- PowerSchool's provision to the customer of standard PowerSchool import templates.
- PowerSchool conducting a mapping and template readiness meeting.
- Reviewing the functionality of the PowerSchool import tool.

# Security Setup

## PowerSchool Implementation Responsibilities

- Conduct a security functionality and review meeting
- Make best practice recommendations on common security group usage
- Provide an overview of page permission functionality
- Review how to manage User Access and Co-Teaching roles
- Review field level security?
- Review Data Validation Rule Status

## Customer Critical Responsibilities

- Attend knowledge transfer meeting of security functionality.
- Review security user guides and training.
- Evaluate the hierarchy and functional roles for administrative staff.
  - Align administrative staff to the correct security group and role utilizing best practice recommendations and security documentation.

## Completion Criteria

This activity will be considered complete when:

- The security functionality and options review meeting is complete.
  - **Security Overview - approximately 2 hours**

# Final Overview Sessions

## PowerSchool Implementation Responsibilities

- **Overview Working with Students – approximately 3 hours**
  - Searching
  - Enrollment/Transfer / Withdraw
  - Live Side Scheduling
- **Running System and Student Reports Overview - approximately 1 hour**

### Standard and Advanced Models only

- Up to 4 hours of report card/transcript development (*Keys to Ownership hours can be used for additional needs*)

- **Overview of the following:**

- |         |                      |
|---------|----------------------|
| ○ Logs  | ○ Standards          |
| ○ Tests | ○ Graduation Planner |

### Advanced Model only

- **Overview of the following:**

- |                       |                       |
|-----------------------|-----------------------|
| ○ Health              | ○ Auto Comm/Auto Send |
| ○ Incident Management | ○ Health              |

# **Additional Scope Items**

## **Advanced Model Only**

### **Mini Business Process Review**

- Up to twelve (12) hour business process review

### **AutoComm/AutoSend**

- AutoComm configuration
- AutoSend configuration

### **Option 1 PowerScheduler Start (begins in Oct-February)**

- PowerSchool implementation specialist will assist customer with the following:
  - New School Year Setup
  - Copy Master Schedule for schools not using PowerScheduler
  - Enrolling students into classes for those schools not using PowerScheduler
  - End of Year process

### **Option 2 Test Start, Summer Production (begins in January-April)**

- PowerSchool implementation specialist will assist customer with the following:
  - Data pump backup in preparation for Test Phase
  - Import of Test data
  - Setting up tracking to record all changes that need to be replicated in Production
  - Data pump restore in preparation for Production
  - Import of Production data

# **Implementation Completion**

## **PowerSchool Implementation Responsibilities**

- Review and track project deliverables.
- Introduce customer to support contact methods.
- Provide final project sign off to customer.

## **Customer Critical Responsibilities**

- Review completed project deliverables prior to implementation completion.
- Understand that support will become primary contact for customer.

## **Completion Criteria**

This activity will be considered complete when PowerSchool:

- Delivers documented final PowerSchool project deliverables.
- Delivery of final deliverable signoff documentation.

# General Assumptions

1. Implementation timelines:
  - a. Basic Model thirty (30) calendar days from the date of the kick-off meeting.
  - b. Standard Model sixty (60) calendar days from the date of the kick-off meeting.
  - c. Advanced Model up to nine (9) months from the date of the kick-off meeting.
2. Implementation services will be delivered remotely.
3. Implementation services are completed when delivered.
4. Full data conversion services are not included unless purchased separately.
5. Services identified are for PowerSchool start up and do not include customizations, including report cards, forms, and transcripts, etc. Services are available through the PowerSchool Product Tailoring for additional fees.
6. Implementation is for one (1) academic year only which will be designated during the planning phase of project. Summer school setup is not included.
7. Customer must identify a designated customer project lead before the project kick-off meeting.
8. The designated customer project lead should be an employee of the organization implementing PowerSchool. Customers that hire third-party organizations to act on the behalf of the customer for implementation may be required to sign a waiver form provided by PowerSchool, indicating that the third-party organization is authorized to act on the customer's behalf when interacting with PowerSchool. The customer will be responsible for maintaining proper communication channels with third party organizations hired by the customer.
9. All sign offs must be done by an employee and designated signatory of the customer. Third-party entities engaged by the customer are not acceptable signatories for any project sign offs.
10. Customer will provide data and information requested in a timely and efficient manner.
11. Customer will provide PowerSchool with remote access to systems, as required.
12. Customer project team will assume responsibility for first line support for customer's end-users.
13. The PowerSchool implementation specialist will point customer to available procedures, guidelines, standards, reference materials and system/application documentation.
14. Other items outside of Scope of Work may need to be planned for by the customer prior to go live.

# Deliverables Acceptance Procedure

## Deliverables Acceptance

This Scope of Work outlines PowerSchool deliverables for each phase of the implementation project in the PowerSchool Objections and Completion Criteria sections. Each deliverable will be reviewed and accepted in accordance with the following procedure:

- Deliverable will be submitted or delivered to the customer project lead or designated customer team member. It is the customer project lead's responsibility to review and accept deliverable as complete.
- Within six (6) business days of completion of the project the customer project lead will either accept the final deliverables or provide the PowerSchool implementation specialist a written list of objections. If no response from the customer project lead is received within six (6) business days, then the deliverables will be deemed accepted, unless the customer requests an extension.
- The PowerSchool implementation specialist will consider the customer's objections within the context of PowerSchool's obligations as stated within this Scope of Work. Revisions agreed to by PowerSchool will be applied at which time the deliverables will be reviewed within six (6) business days and the customer project lead either will accept the deliverables or provide the PowerSchool implementation specialist a written list of objections. If no response is received within six (6) business days, then the deliverables will be deemed accepted, unless the customer requests an extension.
- Customer objections that are not agreed to by PowerSchool will be managed in accordance with the Project Change Control Procedure described below. If resolution is required to a conflict arising from customer's objection to a deliverable, the customer and PowerSchool will follow the Escalation Procedure described below.
- All deliverables required to be delivered hereunder are considered to be owned by PowerSchool with unlimited internal use by the customer, unless otherwise noted.

# Project Change Control and Escalation Procedure

## Project Change Control

The following process will be followed if additional services to this Scope of Work are required or desired.

- A Project Change Request (PCR) will be the vehicle for communicating change. The PCR must describe the change, rationale for the change and the effect the change will have on the project.
- The designated customer project lead will review the proposed change and recommend it for further investigation or reject it. A PCR must be signed by the authorized customer project lead to authorize quote for additional services. If the customer accepts additional services and charges, a change to the original purchase order or new purchase order is required. Change to this Scope of Work through additional addendum will authorize additional scope and work.
- Until a change is agreed upon and PowerSchool obtains a purchase order, both parties will continue to act in accordance with the latest agreed-upon version of the SOW.

## Customer Escalation Procedure

The following procedure will be followed if resolution is required to a conflict arising during the performance of this Scope of Work.

- **Level 1:** Customer project lead will notify PowerSchool implementation specialist via email with details of escalation.
- **Level 2:** If the PowerSchool implementation specialist cannot provide resolution or path to resolution five (5) business days from receipt of level 1 escalation email, the customer project lead will notify PowerSchool manager via email to – **ClassroomServices@powerschool.com**.

## ***PowerSchool SIS Scope of Work***

*Accepted and Agreed To:*

Customer: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_