PASI Writeback and Document Integration

April 30th, 2020
Presentation Agenda

1. Writeback Overview
2. Reviewing PASI Writeback Data by Section
3. Adding vs Editing Records during Writeback
4. Document Integration with PASI
5. Questions and Feedback
What is Writeback?

• Writeback is the action of taking a set of data from SchoolEngage and moving it to another system (PowerSchool)

• Writeback should occur only after the form has been fully reviewed
  • Any “Office Fields” must be completed.
  • Documents should be reviewed.
Writeback Overview – Student Matching

Only for Students who are not linked to PowerSchool.

Two Choices:

- Enroll new Student always appears
- If there is a match*, that match can be selected. Clicking “Open Student” on a Match panel will open that student in PowerSchool

*Matches are based on name, phenetic name, phone number, address
Writeback Overview – Student Matching

Choose whichever option you’d like and it will highlight in blue, and then hit “Next”.

Note the text in red when choosing to match with a student in PowerSchool – this is a PowerSchool restriction.
If “Enroll new student” was chosen, an additional page for basic enrollment information appears*. Terms are pulled directly from PowerSchool. If a term you want is not appearing, it may not be set up yet.

*Note: A common request we get is to have this page pull the data in from a form, this functionality is on the way.
# Writeback Overview – New vs Returning Students

## Existing SchoolEngage Writeback Steps

<table>
<thead>
<tr>
<th>New Students (Accounts only in SchoolEngage)</th>
<th>Returning Students (Not Linked to PowerSchool)*</th>
<th>Returning Students (Students Linked to PowerSchool)*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enroll New / Match Page</td>
<td>Enroll New / Match Page</td>
<td>No Action Needed</td>
</tr>
<tr>
<td>Enrollment Information</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Note: How are students linked to PowerSchool?

Option 1) They were added to PowerSchool, and were automatically synced to SchoolEngage overnight.
Option 2) They created an account in SchoolEngage, and a previous form was written to PowerSchool, creating their record.
Option 3) They created an account in SchoolEngage, and a match in PowerSchool was chosen during writeback.
## Writeback Overview – New vs Returning Students

### PASI SchoolEngage Writeback Steps

<table>
<thead>
<tr>
<th></th>
<th>New Students (Accounts only in SchoolEngage)</th>
<th>Returning Students (Not Linked to PowerSchool)</th>
<th>Returning Students (Students Linked to PowerSchool)</th>
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<tr>
<td>Enroll New / Match Page</td>
<td>Enroll New / Match Page</td>
<td>PASI Actions</td>
<td></td>
</tr>
<tr>
<td>Enrollment Information</td>
<td>PASI Actions</td>
<td>Changes in PowerSchool</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Changes in PowerSchool</td>
<td></td>
</tr>
</tbody>
</table>
• Make sure to verify matches. Linking to the wrong student can lead to a lot of cleanup work
  • PowerSchool 20.4 has some features to help with this
• The keys to getting optimal writeback are:
  • Thorough form review
  • Utilize the Office Tab
  • Test the forms
  • Give feedback to your District SchoolEngage Admin
PowerSchool interacts with PASI via the State Reporting Page

Changes are sent into a queue, where they are validated by PASI

PASI record is updated if validation passes

Any Core Alerts are sent back to PowerSchool

Several Basic Alerts are managed directly in the PowerSchool Interface
Data is broken into relevant sections

Each section has 3 possible actions: Add, Edit, Delete

Not all actions are available on each section
Every section on the PowerSchool State Reporting Page will have its own page added to the writeback process.

Sections with no fields being written, or no changes in data are not shown.

Sections will show all fields in that section that are mapped on the form.

This process only happens for students already enrolled in PowerSchool.
The first column shows the names of each question, as they appear on the form.

Fields marked with (Office) are present on the Office Tab of the application, meaning they are filled out by Admin Assistants.
For users more involved in the form setup process, hovering over a field name will show you how it is mapped in SchoolEngage as well as what field in PowerSchool it is.

<table>
<thead>
<tr>
<th>FORM FIELD</th>
<th>ORIGINAL FORM VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mailing City/Town</td>
<td></td>
</tr>
<tr>
<td>Mailing Postal Code</td>
<td></td>
</tr>
<tr>
<td>Mailing Effective Date (Office)</td>
<td>Map Name: AB - MailingEffectiveDt, Field Id: s_ab_stu_x.mailingeffectivedt</td>
</tr>
</tbody>
</table>

Preferred Mailing Address
The “Original Form Value” column shows what data was on the form when it was generated.

For forms such as a Demographics Update that pull from PowerSchool, this column will contain the data that was in PowerSchool at the time it was generated.

For a New Registration Form, this column will be blank as there was no starting data.
The “Current SIS Value” column shows what is in PowerSchool for this field right now.

This is pulled live, so it will always be accurate.
The “New Form Value” column shows the final value that appeared on the form when it was approved.

This is the value that will be in PowerSchool, after writing back.
### Preferred Mailing Address

<table>
<thead>
<tr>
<th>FORM FIELD</th>
<th>ORIGINAL FORM VALUE</th>
<th>CURRENT SIS VALUE</th>
<th>NEW FORM VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mailing Effective Date (Office)</td>
<td>10/22/2019</td>
<td>11/01/2019</td>
<td></td>
</tr>
<tr>
<td>Mailing Expiry Date (Office)</td>
<td>10/31/2019</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mailing Address</td>
<td>123</td>
<td>14415</td>
<td></td>
</tr>
<tr>
<td>Mailing City</td>
<td>Calgary</td>
<td>Edmonton</td>
<td></td>
</tr>
<tr>
<td>Mailing Postal Code</td>
<td>YTY T7Y7</td>
<td>TSY 4U8</td>
<td></td>
</tr>
<tr>
<td>Mailing Province</td>
<td>BC</td>
<td>BC</td>
<td></td>
</tr>
</tbody>
</table>

**Identification Information**

<table>
<thead>
<tr>
<th>FORM FIELD</th>
<th>ORIGINAL FORM VALUE</th>
<th>CURRENT POWERSCHOOL VALUE</th>
<th>NEW FORM VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal Last Name</td>
<td>Spid</td>
<td>Student</td>
<td></td>
</tr>
<tr>
<td>Legal First Name</td>
<td>Holy</td>
<td>SchoolEngage</td>
<td></td>
</tr>
<tr>
<td>Legal Middle Name</td>
<td>John</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Birthdate</td>
<td>02/06/2000</td>
<td>02/06/2010</td>
<td></td>
</tr>
<tr>
<td>Document Number (Office)</td>
<td>1234</td>
<td>1234</td>
<td></td>
</tr>
<tr>
<td>InData (Office)</td>
<td>yes (1)</td>
<td>yes (1)</td>
<td></td>
</tr>
<tr>
<td>Document Type (Office)</td>
<td>Alberta Adoption Order (AllAdoption)</td>
<td>Alberta Adoption Order (AllAdoption)</td>
<td></td>
</tr>
</tbody>
</table>

### Cell Coloring:

**Yellow** – indicates unique data. If one value is different than the others, it will be highlighted yellow for clarity.

**Red** – Indicates that writing back may erase data, as the value changed in PowerSchool since generated (for Demographics forms).

**Green** – After an action is chosen, this data will be in PowerSchool after writing back.
At the bottom of each page, there is a section for “Recommended Action”

Our system tries to predict the action needed based on what has changed

This is meant to streamline writeback, but should not replace reviewing the data
Recommended Action: Edit

Edit Use this action when the changes to the data reflect a correction or clarification to an existing record. This data will replace the existing record.

Add Use this action when the changes will become the next active data record. The previous record will gain an expiry data and made inactive, but will not be removed.

Ignore Use this action when the data above has no changes or should not currently be moved over. If the 'New Form Value' data above is incorrect, or changes have occurred in PowerSchool since the form was generated, please Cancel writeback and correct the data on the form.

Investigate If Investigate is recommended, it means that our system was not able to clearly determine the action required, and that further manual review should be done before continuing.

Cancel If Cancel is recommended, it means that there may be changes required on the form before writing back and further research should be done.
In School Engage, we allow 2 or 3 actions on each section (depending on PowerSchool Rules)

All Sections have Add, Edit and Delete, with the exception of:
  Gender, Primary Language, Identification Information do not allow Add
Choosing an Action - Add

“Add” is the same as the Plus icon in PowerSchool

This will update the current fields on the State Reporting page, but when it is processed by PASI, it will expire the previous record and add the new form values as a new entry.

This should be used for changes in the information of a student, such as move, a new phone or a legal name change.
Choosing an Action - Edit

“Edit” is the same as the Pencil Icon in PowerSchool

This will reflect any new changes on the State Reporting page and modify the current PASI entry, but leave everything that is the same.

This should be used for corrections in the information of a student, such as typo or genuine error.
Choosing an Action - Ignore

“Ignore” can be used to ignore the changes on a form and keep what was entered in a section.

This is for a situation where a form has introduced errors, and they were not caught during review.
Choosing an Action - Cancel

Sometimes if there are errors in the data, whether it be something missed in review or something that has changed in PowerSchool that you need to look into.
Choosing an Action—Tips

• If every field in a section has changed, this usually indicates a major change and should be added

• Check “key” fields in each section for changes. Even if they’re the only field changed, it can indicate a new record. For example:
  • If Phone Number changes more than one digit, it is likely a new Number, so “Add”
  • If Phone Effective Date changes but not number, then it is likely an update, and so it should be “Edit”
Changes in PowerSchool

Changes in PowerSchool Since Form Creation

<table>
<thead>
<tr>
<th>FORM FIELD</th>
<th>ORIGINAL FORM VALUE</th>
<th>CURRENT SIS VALUE</th>
<th>NEW FORM VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preferred Last Name</td>
<td>Johnson</td>
<td>McDermott</td>
<td>Johnson</td>
</tr>
<tr>
<td>Permanent Province</td>
<td>BC</td>
<td>AB</td>
<td>BC</td>
</tr>
<tr>
<td>Student First Name</td>
<td>Brandon</td>
<td>NEWT</td>
<td>Brandon</td>
</tr>
<tr>
<td>Student Last Name</td>
<td>Johnson</td>
<td>NEWT</td>
<td>Johnson</td>
</tr>
<tr>
<td>Physical Province</td>
<td>BC</td>
<td>AB</td>
<td>BC</td>
</tr>
<tr>
<td>Mailing Province</td>
<td>BC</td>
<td>AB</td>
<td>BC</td>
</tr>
</tbody>
</table>

The above fields have all changed in PowerSchool since the form was created, and would be overridden on a writeback. Please review these carefully, and cancel writeback to make any changes to the form if necessary.

After choosing all PASI actions, and additional page is shown that contains a list of any fields being written back that have changed in PowerSchool since the form was generated – including custom extensions.

This step can also be taken before Approval by clicking “Show Changes”. If you cannot see this tab, please talk to your District SchoolEngage Admin and we can help them set this up for your district.
Changes in PowerSchool

PowerSchool has many different rules that are validated in the interface. We have ported all of them over to SchoolEngage to make sure that data written back is correct.
In SchoolEngage, Guardians are required to upload an assortment of documents including citizenship documents, custody documents and proof of address. In addition to that, SchoolEngage automatically generates PDFs of each form upon approval.
The main file window shows files currently in PASI and files yet to be uploaded.

* Development Screenshots are subject to change prior to release.
Clicking on a file allows you to expand the data to view any previously entered metadata, as well as seeing a preview of the file itself without having to download and open it.
Before sending files to PASI, you can enter any missing metadata so that the file is already fully correct when it arrives in PASI.
Whenever the file is ready to go, simply press “Push to PASI”
If you have some other files that are only for reference and don’t need to go to PASI, you can press “Lock” to store them locally as they are. A locked file cannot be modified or uploaded to PASI.

You can always unlock them in the future if you need.
Questions and Feedback?
Thank You!

Feedback and Suggestions:
info@intellimedia.ca