



PowerSchool Group LLC
 150 Parkshore Dr., Folsom, CA 95630
 Quote #: Q-988929 - 2
 Quote Expiration Date: 30-JUN-2024

Sales Quote - This Is Not An Invoice

Prepared By:	Adam Pesola	Customer Contact:	Alicia Santana
Customer Name:	Pathways in Education West Ada Inc.	Title:	
Enrollment:	160	Address:	6074 N. Discovery Way
Contract Term:	36 Months	City:	Boise
Start Date:	5-JUN-2024	State/Province:	Idaho
End Date:	4-JUN-2027	Zip Code:	83713
		Country:	United States
		Phone #:	(626) 204-2523

Product Description	Quantity	Unit	Extended Price
Initial Term 5-JUN-2024 - 4-JUN-2025			
License and Subscription Fees			

SchoolMessenger Communicate	160.00	Students	USD 2,500.00
PowerSchool SIS Hosted Subscription	160.00	Students	USD 3,500.00
PowerSchool SIS Hosting SSL Certificate	1.00	Each	USD 400.00

License and Subscription Totals: **USD 6,400.00**

Professional Services and Setup Fees	Quantity	Unit	Extended Price
SchoolMessenger Communicate Basic Deployment	1.00	Each	USD 2,520.00
PowerSchool SIS Deployment - Guided	1.00	Each	USD 12,670.00
Professional Services and Setup Fee Totals:			USD 15,190.00

SchoolMessenger Communicate Basic Deployment	1.00	Each	USD 2,520.00
PowerSchool SIS Deployment - Guided	1.00	Each	USD 12,670.00

Professional Services and Setup Fee Totals: **USD 15,190.00**

Training Services	Quantity	Unit	Extended Price
SIS Per Person Per Day Training/Certification Remote	9.00	Each	USD 1,710.00
Training Services Total:			USD 1,710.00

SIS Per Person Per Day Training/Certification Remote	9.00	Each	USD 1,710.00
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Training Services Total: **USD 1,710.00**

Subscription Period Total	Total Discount	Initial Term	Amount To Be Invoiced
	USD 1,710.00	5-JUN-2024 - 4-JUN-2025	USD 23,300.00

	USD 1,710.00	5-JUN-2024 - 4-JUN-2025	USD 23,300.00
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Annual Ongoing Fees as of 5-JUN-2025 - Fees subject to an annual uplift, which will be reflected on renewal quote

SchoolMessenger Communicate	160.00	Students	USD 2,500.00
PowerSchool SIS Hosted Subscription	160.00	Students	USD 3,500.00

PowerSchool SIS Hosting SSL Certificate

1.00

Each

USD 400.00

Annual Ongoing Fees Total: **USD 6,400.00**

Fees charged in subsequent periods after the duration of this quote will be subject to an annual uplift. Customer understands the above Annual Ongoing Fees for the next subscription period do not include the annual uplift, which will be applied at the time of renewal. On-Going PowerSchool Subscription/Maintenance and Support fees are invoiced at the then current rates and enrollment per terms of the main agreement executed between PowerSchool and Customer ("Main Services Agreement"). Any applicable state sales tax has not been added to this quote. Subscription Start and End Dates shall be as set forth above, which may be delayed based upon the date that PowerSchool receives your purchase order. If this quote includes promotional pricing, such promotional pricing may not be valid for the entire duration of this quote. All invoices shall be sent to Customer upon or promptly after execution of this quote, unless otherwise set forth in the applicable statement of work or Main Services Agreement (e.g., services billed on time and material basis will be invoiced when such services are incurred). Notwithstanding anything to the contrary in the Main Services Agreement, if Customer pays in advance for any professional services, all professional services must be scheduled and delivered within twelve (12) months of the applicable quote start date, unless otherwise agreed in writing by PowerSchool; any portion of any prepaid amount for professional services that has not been used by Customer toward professional services rendered within such twelve (12) month period will be forfeited. Payment shall be due to PowerSchool before or on the due date set forth on the applicable invoice. All purchase orders must contain the exact quote number stated within. Customer agrees that purchase orders are for confirming this order and its own internal purposes, and no other. Any credit provided by PowerSchool is nonrefundable and must be used within 12 months of issuance. Unused credits will be expired after 12 months. Treatment of purchase orders are governed as provided in the Main Services Agreement. By execution of this quote, or its incorporation, this and future purchases of subscriptions or services from PowerSchool are subject to and incorporate the terms and conditions found at: https://www.powerschool.com/MSA_Mar2024/

THE PARTIES BELOW ACKNOWLEDGE THAT THEY HAVE READ THE AGREEMENT, UNDERSTAND IT AND AGREE TO BE BOUND BY ITS TERMS.

POWERSCHOOL GROUP LLC

Signature:



Printed Name: Eric Shander

Title: Chief Financial Officer

Date: 6-JUN-2024

Pathways in Education West Ada Inc.

Signature:



Printed Name: **Jamie Donahue**

Title: **President**

Date: **06/13/2024**

*****Sales Quote - This Is Not an Invoice*****

Statement of Work

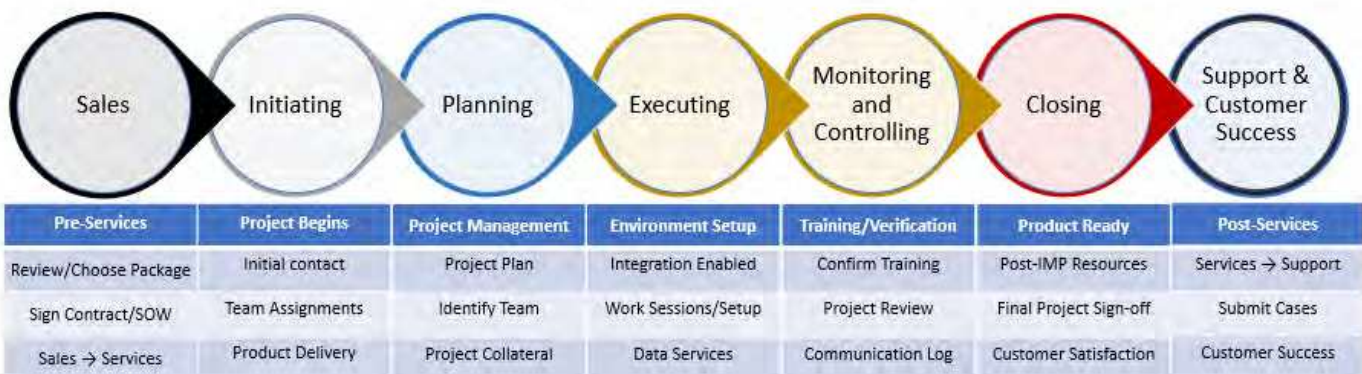
Purpose of Document

The purpose of this Statement of Work (“SOW”) between the PowerSchool entity in accompanying quote (“PowerSchool”) and Customer (“You”, “Your”) is to outline the process, approach, and completion criteria for each step of the process to implement PowerSchool. This document covers the roles and responsibilities of the PowerSchool Project Manager, Implementation Specialist(s), 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. The timeline will be mutually adapted within a project management tool between PowerSchool and the Customer. PowerSchool provides a comprehensive package of services designed to ensure Your PowerSchool deployment project meets Your unique needs and expectations. Additional training, consulting and customization services can be purchased to help augment additional needs You may have with Your PowerSchool deployment. The delivery of Professional Services contained in this document will be provided remotely. If travel is required, all travel related expenses will be invoiced as incurred.

We will partner with You and be Your liaison to PowerSchool during the implementation. You will have a project team 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. The overall steps included in a project are outlined below.

This Statement 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 has licensed the PowerSchool application to the Customer.



General Assumptions

1. Implementation services will be delivered remotely unless onsite services are purchased separately.
2. Client is to provide a data extract to PowerSchool in accordance with Tiered Service package selected (if needed).
3. Implementation timeline is stated within the Planning Phase, extending the timeline may require the customer to purchase additional services.
4. Implementation services are completed when delivered and the deliverable acceptance procedure is complete.
5. Additional services are available and can be purchased for items out of the scope of implementation (see Project Change Control and Escalation Change Procedure section of this document).
6. Customer will adhere to the active PowerSchool Cancellation Policy. “Services Cancellation: Licensee shall pay a cancellation charge equal to fifty percent (50%) of the services fee and any non-refundable expenses incurred by PowerSchool if Licensee cancels any scheduled professional services less than fourteen (14) days before the occurrence of any service dates that PowerSchool has scheduled at Licensee’s request.”
7. Customer must identify a designated Customer project lead before the project kick-off meeting. The Customer project lead will be responsible for delivering all sections of the “Customer Responsibilities” included in the SOW in a complete manner within the project timeline.
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. The PowerSchool Project Manager and/or Application Specialist will guide Customer to available procedures, guidelines, standards, reference materials and system/application documentation.
11. Implementation Services is assuming the product will be deployed as-is, items outside of Scope of Work must go through the change control procedures (see Project Change Control and Escalation Procedure in this document).

Deliverables Acceptance Procedure

Deliverables Acceptance

This Statement 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 Statement 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 Statement 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 Statement of Work through additional addendum will authorize additional scope and work.
- A written Change Authorization and/or PCR must be signed by authorized representatives from both parties to authorize implementation of the investigated changes. Until a change is agreed upon in writing, both parties will continue to act in accordance with the latest agreed version of the SOW.

Customer Escalation Procedure

The following procedure will be followed if resolution is required for a conflict arising during the project

- **Level 1:** Customer project lead will notify PowerSchool Project Manager via email with details of escalation.
- **Level 2:** If the PowerSchool Project Manager 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 – pmleadership@powerschool.com
- **Level 3:** If the concern remains unresolved after Level 2 intervention, resolution will be addressed in accordance with Project Change Control Procedure or termination of this SOW under the terms of the Contract.

During any resolution, PowerSchool agrees to provide services related to items not in dispute, to the extent practicable, pending resolution of the concern. The Customer agrees to pay invoices per the Contract, as rendered.

PowerSchool SchoolMessenger Communicate Basic Deployment Statement of Work

Assumptions

The SOW contains the tasks PowerSchool prescribes for effective SchoolMessenger Communicate Basic Deployment.

Parameters:

- Complete up to five (5) Imports from a single data source.
- Enable up to ten (10) total broadcasts.
- Create up to five (5) users accounts per district and three (3) user accounts per school.

If the customer request significantly exceeds the parameters, PowerSchool will evaluate and present an SOW and corresponding quote for any additional services that cannot be covered within this SOW.

Note that this SOW does not contain non-PowerSchool affiliated SIS configuration or user authentication configuration. If it is determined by the Customer that these services are required, PowerSchool will scope services and present an SOW and corresponding quote.

Initiating (Pre-requisites before Planning)

PowerSchool Responsibilities

- Send Welcome Email with Statement of Work
- Identify PowerSchool Project Team
 - Implementation Specialist(s)
- Send Customer access to the following:
 - Configuration Survey
 - User Document
 - Attendance Document

Customer Responsibilities

- Complete Configuration Survey prior to Kick-Off Meeting
- Review the Statement of Work

PowerSchool SchoolMessenger Communicate Basic Deployment Statement of Work

Planning

Completion Criteria

This activity will be considered complete when:

- The kick-off meeting is complete
- Configuration Survey, User Document, and Attendance Document completed

Project Phase: PLANNING: Tasks and Deliverables	Responsible Party
Schedule and Conduct Kick-Off meeting (30 min duration)	PowerSchool
Provide introduction to the Support site	PowerSchool
Explain the Implementation Process	PowerSchool
Schedule regular status calls as needed	PowerSchool
Confirm SOW	Both
Review and confirm responses from Configuration Survey	Both
Complete Configuration Documents: <ul style="list-style-type: none"> • User Document • Attendance Document 	Customer

Executing

Completion Criteria

This activity will be considered complete when:

- Recommended UAT Checklist Provided to Customer

Project Phase: EXECUTING: Tasks and Deliverables	Responsible Party
Communicate platform configuration: <ul style="list-style-type: none"> • Create User(s) per User Document • Set Up Attendance Broadcast(s) per Attendance Document 	PowerSchool
Schedule and Conduct Data Meeting (60 min duration) (may be combined w/ other meeting or conducted via email per customer preference)	PowerSchool
Send data files	Customer
Configure the following System Settings: <ul style="list-style-type: none"> • Configure SFTP Scripts • Create Imports • Map Files to Import Settings 	PowerSchool
Schedule and conduct Solutions Deliverables meeting. (30 min duration) (may be combined w/ other meeting or conducted via email per customer preference)	PowerSchool
Provide recommended UAT Checklist	PowerSchool

PowerSchool SchoolMessenger Communicate Basic Deployment Statement of Work

Monitoring

Completion Criteria

This activity will be considered complete when:

- Customer has attended any additional training included in their package
- Customer has completed the End User Testing Checklist

Project Phase: MONITORING: Tasks and Deliverables	Responsible Party
Ensure solution adheres to best practices by performing standard QA/testing procedures	PowerSchool
Attend all Product Overviews and Training	Customer
Complete (UAT) end-user testing within the software	Customer
Log and Follow Up on Support Cases as needed	Customer
Report critical issues to your implementation team	Customer

Closing

PowerSchool Responsibilities

- Review and finalize any remaining project deliverables
- Introduce customer to support contact methods
- Submit Services to Support Survey
- Provide final project sign off to customer

Customer Responsibilities

- Review completed project deliverables
- Understand that support will become primary contact for customer
- Complete final project signoff
- Complete Customer Satisfaction Survey

Completion Criteria

This activity will be considered complete when:

- Customer completes final project signoff

Student Information System

Guided Statement of Work

Initiating (Pre-requisites before Planning)

PowerSchool Responsibilities

- Send Welcome Email with Statement of Work
 - Identify PowerSchool Project Team
 - Project Manager
 - Implementation Specialist(s)
- Send Customer access to the following:
 - Project Plan

Completion Criteria

This activity will be considered complete when:

- Customer reviews Statement of Work

Planning

PowerSchool Responsibilities

- Schedule and conduct a kick-off meeting
 - Guided Model is sixty (60) calendar days from the date of the kick-off meeting
- Provide introduction to the Support site
- Explain the implementation process
- Schedule the PowerSchool implementation and training resources based on project timeline
- Update the Project Plan to include implementation timing and resources
- Schedule regular Status Calls as needed

Customer Responsibilities

- Attend kick-off meeting and all subsequent meetings and training required
- Utilize the online Project Plan and Training Plan throughout the project to stay up to date
- Complete the PowerSchool Intake Survey based on information gathered from key stakeholders, and delivery the following:
 - Supporting documents as required (i.e. location, staff and student count, district info, etc.)
 - Extract and convert required data from Customer legacy system to PowerSchool provided templates and format (Data conversion services are available for additional purchase)
- Plan for training and ensure users attend required training sessions
- Update the Project Plan to indicate client tasks completed
- Manage customer business process change throughout the project
- Notify designated PS point of contact when Your Intake Survey is complete

Student Information System

Guided Statement of Work

Completion Criteria

This activity will be considered complete when:

- The kick-off meeting is completed
- The Project Plan is updated based on discussed timelines
-

Authentication Services

As part of these services, PowerSchool will assist the customer to configure Single Sign On (SSO) for the PowerSchool product(s) undergoing implementation under the scope of this statement of work.

Additionally, the PowerSchool team will assist with the enablement of the PowerSchool AppSwitcher for any other live PowerSchool product(s) (i.e. already implemented) where AppSwitcher is supported. This will be a one-time setup for which the PowerSchool team will assist with the setup and configuration of the authentication services for live product(s), and the currently implemented product(s).

PowerSchool Responsibilities

- Update user accounts to ensure matching between systems
- Configure AppSwitcher wfor PowerSchool SIS

Customer Responsibilities

- Identify and enable the Identity Provider (IDP) for setting up of SSO
- Configure SSO
- Test the setup of Authentication services and AppSwitcher

Completion Criteria

- Customer signs the final checklist that Authentication Services are complete

Student Information System

Guided Statement of Work

Executing

Configuration Collection: Customer Critical Responsibilities

- Consult with customer stakeholders and provide answers to follow-up questions regarding configuration elements.
- Extract data from legacy system into PowerSchool provided templates
- Complete IPT Training
- Complete PD+ SIS implementation learning paths

Completion Criteria

This activity will be considered complete when:

- Configuration collection, associated documentation and data templates are complete and provided to PowerSchool
- Customer sign off on configuration phase

Customer Critical Responsibilities

- Extract and convert required data from customer legacy system to PowerSchool provided templates and format (*Data conversion services are available for additional purchase.*)
- Customer imports data into PowerSchool using PowerSchool import tools
- **Data Validation** - Once data is imported into PowerSchool, the PowerSchool implementation specialist 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.
- Validate data in PowerSchool and obtain concurrence from key school stakeholders.

Completion Criteria

This activity will be considered complete upon:

- Customer has imported all provided data
- Customer validates new data in PowerSchool
- Customer signs off on data phase

Student Information System

Guided Statement of Work

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 are complete

Closing

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
- Complete User Acceptance Training (UAT)
- Complete project Deliverables Checklist

Completion Criteria

This activity will be considered complete when PowerSchool:

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

Student Information System

Guided Statement of Work

Appendix A

Guided Implementation Overview

Implementation Session	Topics	District Attendees	PowerSchool Attendees
<u>Pre-planning Call</u> (30 minutes)	<ul style="list-style-type: none"> Project Scheduling Desired launch dates <ul style="list-style-type: none"> Blackout dates 	Client Enrollment Lead/Project Team	Project Manager
<u>Kick Off</u> (60 minutes)	<ul style="list-style-type: none"> Review implementation process Introduce Team Outline expectations Project Goals and Objectives Review Project Plan Review Training Resources Review agenda items for next meeting Review Project Risks 10-Second Sentiment Survey 	Data Lead/Contact Database Admin Training Contact	Project Manager Application Specialist
<u>System/District Configuration</u> (2 hours)	<ul style="list-style-type: none"> Review project plan Guided session to review best practice configuration set up for: <ul style="list-style-type: none"> System Set up (see project plan for set up items) District Set up (see project plan for set up items) Batch School Setup (for future years) Review agenda items for next meeting Review Project Risks 10-Second Sentiment Survey 	Lead/Contact Database Admin Training Contact	Application Specialist
<u>Elementary School Configuration</u> (2 hours)	<ul style="list-style-type: none"> Review project plan Guided session to review best practice configuration set up for: <ul style="list-style-type: none"> School Set up (see project plan for set up items) Review agenda items for next meeting Review Project Risks 	Lead/Contact Database Admin Training Contact	Application Specialist

Student Information System Guided Statement of Work

	<ul style="list-style-type: none"> • 10-Second Sentiment Survey 		
<u>Secondary School Configuration</u> (2 hours)	<ul style="list-style-type: none"> • Review project plan • Guided session to review best practice configuration set up for: • School Set up (see project plan for set up items) • Review agenda items for next meeting • Review Project Risks • 10-Second Sentiment Survey 	Lead/Contact Database Admin Training Contact	Application Specialist
<u>Security/SSO Overview</u> (2 hours)	<ul style="list-style-type: none"> • Review Project Plan • The Implementation Specialist will provide an overview of PowerSchool Security and share best practices for user security: • Groups • User by Group • Roles Administration • Access to Page Permissions • Field Level Permissions • Password Rules Management • State/Compliance Report Security • SSO Overview • Review agenda items for next meeting • Review Project Risks • 10-Second Sentiment Survey 	Lead/Contact Database Admin Training Contact	Application Specialist

Student Information System Guided Statement of Work

<p><u>Data Template Overview #1</u> (2 hours)</p>	<ul style="list-style-type: none"> • Review Project Plan • Review Core Data Import Templates • Student (Student number Verification) • Staff • Courses • Sections • Student Schedules • Historical Grades • Reenrollments • Contacts • Student Email • Review agenda items for next meeting • Review Project Risks • 10-Second Sentiment Survey 	<p>Lead/Contact Database Admin Training Contact</p>	<p>Application Specialist</p>
<p><u>Data Template Overview #2</u> (2 hours)</p>	<ul style="list-style-type: none"> • Review Project Plan • Review Core Standard & Comprehensive Import Templates <ul style="list-style-type: none"> ○ Standards ○ Test Scores ○ Discipline Log Entries ○ Comment Bank • Review agenda items for next meeting • Review Project Risks • 10-Second Sentiment Survey 	<p>Lead/Contact Database Admin Training Contact</p>	<p>Application Specialist</p>

Student Information System Guided Statement of Work

<p><u>Data Manager #1</u> (2 hours)</p>	<ul style="list-style-type: none"> • Review Project Plan • The Implementation Specialist will walk through how-to import data via Quick Import • The Implementation Specialist will review Data Validation after Import steps • Additionally, a brief overview will be provided of where data imported for the customer resides in the system • Review agenda items for next meeting • Review Project Risks • 10-Second Sentiment Survey 	<p>Lead/Contact Database Admin Training Contact</p>	<p>Application Specialist</p>
<p><u>Import Troubleshooting #1</u> (2 hours)</p>	<ul style="list-style-type: none"> • Review Project Plan • The Implementation Specialist will help the customer with troubleshooting data import issues • Review agenda items for next meeting • 10-Second Sentiment Survey 	<p>Lead/Contact Database Admin Training Contact</p>	<p>Application Specialist</p>
<p><u>Data Manager #2</u> (2 hours)</p>	<ul style="list-style-type: none"> • Review Project Plan • The Implementation Specialist will walk through how-to import data via Data Import Manager (to include Student Email) • Additionally, a brief overview will be provided of where data imported for the customer resides in the system • Review agenda items for next meeting • Review Project Risks • 10-Second Sentiment Survey 	<p>Lead/Contact Database Admin Training Contact</p>	<p>Application Specialist</p>

Student Information System Guided Statement of Work

<u>Reports Overview</u> (2 hours)	<ul style="list-style-type: none"> • Review Project Plan • Reports Overview of the following: <ul style="list-style-type: none"> ○ Data Grids (Attendance, At Risk, Health, Incidents) ○ System Reports ○ State Reports ○ Object Reports ○ Enterprise Reporting ○ Running Student Reports • Review agenda items for next meeting • 10-Second Sentiment 	Project Lead Database Administrator Key internal Stakeholders	Application Specialist
<u>State/Provincial Reporting Overview</u> (2 hours)	<ul style="list-style-type: none"> • Review State Reporting Guide • Provide access to available Compliance Resources • Provide Best Practices recommendations <ul style="list-style-type: none"> ○ District, School, Student, Staff, Courses, Sections, as applicable • Review agenda items for next meeting • 10-Second Sentiment 	Lead/Contact Compliance Rptg Lead Database Admin Training Contact	Application Specialist

Student Information System Guided Statement of Work

<u>Go-live Readiness</u> (2 hours)	<ul style="list-style-type: none"> The Implementation Specialist will review the Implementation Check with client The Implementation Specialist will review the Deliverables Checklist with client and identify tasks needing to be completed Client makes necessary modifications post-session Review agenda items for next meeting 10-Second Sentiment Review agenda items for next meeting 10-Second Sentiment 	Lead/Contact Database Admin Training Contact	Application Specialist
<u>Production Adoption/Go Live</u> (2 hours)	<ul style="list-style-type: none"> The Implementation Specialist and Client will review the Configuration The Implementation Specialist and Client will review the Deliverables Checklist Review Project Risks 10-Second Sentiment Survey 	Lead/Contact Database Admin Training Contact	Application Specialist

Student Information System

Guided Statement of Work

Appendix B

System Settings

PowerSchool Reviews Critical System Settings:

System-Level Settings		
	Guided	Comment/Resources
Email Setup (video available)	Best Practice	<p>Hosted Customer: The system will be set up to enable the automatic sending of system-generated emails. The customer will be responsible for setting up the specific From and Reply-to email addresses on the Email Setup screen.</p> <p>Non-Hosted Customers: The customer will be responsible for setting up their email service on the Email Setup screen.</p> <p>-setup</p>
Password Rules Management	Best Practice	<p>By default, PowerSchool best practices will be set up. The customer can edit these rules on the Password Rules Management screen.</p> <p>Best Practice:</p> <ul style="list-style-type: none"> - 8 characters minimum - Passwords must contain at least 1 uppercase letter, 1 lowercase letter, 1 special character, and 1 numeric character - Passwords expire every 60 days - Passwords can be reused every 5 cycles - Accounts will be locked after 5 incorrect attempts

Student Information System

Guided Statement of Work

PowerSchool Standard Configuration for District Settings

District-Level Settings		
	Guided	Comment/Resources
District Info	Best Practice	<p>The district name, address, and ID will be set up for each school based on the information provided by the customer. Additional settings can be configured by the customer on the District Info screen.</p> <p>Application Specialist will provide an overview of District level configuration settings for State/Provincial Compliance reporting as part of the State/Provincial Overview Session</p>
Districts of Residence	State or System Defaults Only	<p>If districts of residences are defined by state reporting, they will be set up by default, otherwise they will be left blank, per best practice. Additional entries can be made by the customer on the Districts of Residence screen if they choose to use this feature.</p> <p>-residence</p>
Years & Terms	Best Practice (Online Guide)	<p>As best practice, the current school year will be set up using default start and end dates</p> <p>Default Year: 20XX-20XX (7/1/20XX - 6/31/20XX)</p> <p>The dates can be adjusted by the customer and additional years can be added on the Years & Terms screen.</p>
Calendar Membership Types	State or System Defaults Only	<p>If required for state compliance, the required values will be entered by default. If not required, default values will be set up and can be adjusted by the customer on the Calendar Membership Types screen.</p> <p>Default Values:</p> <ul style="list-style-type: none"> - Holiday - In Session - Teacher in Services / Professional Development - Vacation - Weather
Entry Codes (from state guidelines or config survey)	Best Practice Or State Defaults Only	<p>If required for state compliance, the required values will be entered by default. If not required, default values will be set up and can be adjusted by the customer on the Entry Codes screen.</p> <p>Default Values:</p> <ul style="list-style-type: none"> - OE Original Entry - P Promoted - R Retained - RT Returning Student - G Graduated

Student Information System

Guided Statement of Work

Exit Codes (from state guidelines or config survey)	State or System Defaults Only	<p>If required for state compliance, the required values will be entered by default. If not required, default values will be set up and can be adjusted by the customer on the Exit Codes screen.</p> <p>Default Values:</p> <ul style="list-style-type: none"> - EX Expulsion - EG Early Graduate - TD Transfer in District - TO Transfer Out of State - TS Transfer in State - GR Graduated - PR Promoted - RE Retained - DE Death
Scheduling/Reporting Ethnicity Codes or Federal Ethnicity and Race Settings	State or System Defaults Only	<p>If required for state compliance, the required values will be entered by default. If not required, default values will be set up and can be adjusted by the customer on the Scheduling/Reporting Ethnicity Codes screen.</p> <p>Default Values:</p> <ul style="list-style-type: none"> - A Asian - B African-American - C Caucasian - H Hispanic - I American Indian - O Other - P Pacific Islander
State Special Programs (core module only)	State or System Defaults Only	<p>If required for state compliance, the required values will be entered by default. If not required, the customer can set up their own programs on the Special Programs screen.</p>
Grade Scales	Best Practice	<p>The system will be configured with several grade scales to choose from. Customers can edit the default grade scales or create their own on the Grade Scales screen.</p> <p>Default Grade Scales:</p> <ul style="list-style-type: none"> - 100 Point Scale - A, B, C, D, F - Default (A, A-, B+, B, B-, C+, C, C-, D+, D, <u>D-, F</u>)

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<p>GPA Calculations (system defaults)</p>	<p>Best Practice (Configuration Session)</p>	<p>The system will be configured with several GPA Calculations to choose from. Customers can edit the default calculations or create their own on the GPA Calculations screen.</p> <p>Default GPA Calculations:</p> <ul style="list-style-type: none"> - Added Value - Simple - Simple Percent - Weighted - Weighted <u>Percent</u>
<p>Schools/School Info (config survey)</p>	<p>Best Practice</p>	<p>School names, school numbers (ID's), and addresses will be set up based on the information provided during the sales process. School numbers (ID's) cannot be changed, so it is very important that these are correct prior to beginning the implementation process.</p> <p>Additional information (principal names, phone numbers, state-required fields, etc.) can be entered by the customer on the Schools/School Info screen.</p> <p>Application Specialist will provide an overview of District level configuration settings for State/Provincial Compliance reporting as part of the State/Provincial Overview Session</p>
<p>Log Types/SubTypes (state codes only)</p>	<p>State or System Defaults Only</p>	<p>If required by state compliance, the required log types will be set up. Otherwise, default log types will be set up and can be adjusted by the customer on the Log Types screen.</p> <p>Default Log Types:</p> <ul style="list-style-type: none"> - Discipline - Health - Counselor - Attendance - Parent Contact - Grade Change
<p>Log Entry Fields</p>	<p>State or System Defaults Only</p>	<p>If required by state compliance, the required fields will be set up. Otherwise, log entry fields and codes can be adjusted by the customer on the Log Entry Fields screen.</p>

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<p>Test Scores (ACT, SAT, PSAT defaults only)</p>	<p>Best Practice (Configuration Session)</p>	<p>The following tests and subscores will be set up by default. These tests can be deleted by the customer if they do not apply and additional tests and subscores can be configured by the customer on the Tests screen.</p> <p>Default Tests: ACT (Subscores: Composite, Math, Reading, Science, Social Studies, Writing) SAT (Subscores: Total, EBRW, Math) PSAT (Subscores: Total, Math, Reading, Writing)</p>
<p>Immunizations (state immunizations/vaccines only)</p>	<p>State Defaults Only</p>	<p>If required by state compliance, the required state immunizations will be set up by default.</p> <p>All other immunizations can be configured by the customer on the Health -> Immunizations screen.</p>
<p>Incident Management (only if required by state reporting)</p>	<p>State Defaults Only</p>	<p>Incident Management is only included if the module is required for state compliance, in which case, the state defaults will be set up.</p> <p>If not required by state compliance, the customer can configure this module post-implementation, but it is not considered in-scope for basic or standard tiered implementations.</p>

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PowerSchool Standard Configuration for School Settings

School-Level Settings Must be setup after server is installed		
	Standard	Comment/Resources
State/Provincial Compliance	Best Practice (Online Guide)	Application Specialist will provide an overview of School level configuration settings for State/Provincial Compliance reporting as part of the State/Provincial Overview Session
Years & Terms (from config template)	Best Practice (Online Guide)	<p>The current school year will be set up by default using default start and end dates</p> <p>Default Year: 20XX-20XX (8/1/20XX - 6/31/20XX)</p> <p>The dates can be adjusted by the customer and additional years can be added on the Years & Terms screen. The customer is also responsible for configuring additional scheduling terms (examples: semesters, quarters, trimesters) on the Years and Terms screen.</p> <p>https://docs.powerschool.com/PSHSA/20.4/system-admin/scheduling/years-and-terms</p>
Days (from config template)	Best Practice (Online Guide)	<p>By default, 1 cycle day will be set up for each school (Day A).</p> <p>Default Day: Day A (A)</p> <p>If additional cycle days are required, the customer can add additional days on the Years and Terms screen and configure/name the days on the Days screen.</p> <p>https://docs.powerschool.com/PSHSA/20.4/scheduling/scheduling-setup/school-parameters#id-.SchoolParametersv19.0.0-EditDays</p>
Periods (from config template)	Best Practice (Online Guide)	<p>By default, the following periods will be set up for each school. The customer can rename, delete, and add additional periods using the Periods screen.</p> <p>Default Periods: ATT (Attendance) E (Elementary) P1 (Period 1) P2 (Period 2) P3 (Period 3) P4 (Period 4) P5 (Period 5) P6 (Period 6) P7 (Period 7)</p>

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<p>Final Grade Setup (from config template)</p>	<p>Best Practice (Online Guide)</p>	<p>By default, the following grading terms will be set up for each school. The customer can then adjust the terms and dates using the Final Grade/Reporting Terms screen.</p> <p>Default Terms: Y1 (8/1/20XX - 6/31/20XX) S1 (8/1/20XX - 12/31/20XX) S2 (1/1/20XX - 6/31/20XX) Q1 (8/1/20XX - 9/30/20XX) Q2 (10/1/20XX - 12/31/20XX) Q3 (1/1/20XX - 3/31/20XX) Q4 (4/1/20XX - 6/31/20XX)</p>
<p>Attendance Conversion (video available)</p>	<p>Best Practice (Online Guide)</p>	<p>By default, the following attendance conversions will be set up for each school. If a different conversion is required, the customer can adjust these on the Attendance Conversions screen.</p> <p>Default Attendance Conversions: Elementary Schools = Code-to-Day conversion - Day Value of 0 for the codes: UA, EA, OSS - Day Value of 1 for the codes: Present, UT, ET, ISS, FT</p> <p>Middle/High Schools = Period-to-Day conversion (change to percent-to-time) - 0% -> 0 - 25% -> .25 - 50% -> .5 - 75% -> 1</p>
<p>Bell Schedules (from config template)</p>	<p>Best Practice (Online Guide)</p>	<p>By default, the following bell schedule will be created for each school. The customer can then adjust the periods and start/end times to match their operations. The customer can also create additional bell schedules, as needed (ex. late start, early dismissal, etc.).</p> <p>Default Bell Schedule: Name: Regular Day ATT: 7:45 AM - 8:00 AM E: 8:00 AM - 3:00 PM P1: 8:00 AM - 9:00 AM P2: 9:00 AM - 10:00 AM P3: 10:00 AM - 11:00 AM P4: 11:00 AM - 12:00 PM P5: 12:00 PM - 1:00 PM P6: 1:00 PM - 2:00 PM P7: 2:00 PM - 3:00 <u>PM</u></p>

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Calendar Setup (customer sets holidays, etc.)	Best Practice (Online Guide)	By default, the calendar for each school will be set so Monday-Friday are in-session. The customer will be responsible for adjusting the calendars for holidays, in-service days, etc.
Current Grade Display (first term from final grade setup)	Best Practice (Online Guide)	By default, the Q1 (quarter 1) term will be set. The customer can change this setting on the Current Grade Display screen.
Attendance Preferences	Best Practice (Online Guide)	By default, Meeting Attendance will be enabled for each school (e.g. period attendance - allowing teachers to take attendance). Daily attendance and other attendance settings can be configured by the customer on the Preferences screen.
Attendance Code Categories (Unexcused, Excused, Tardy)	Best Practice (Online Guide)	<p>By default, the following attendance code categories will be set up for each school. These are required for system reports to function, but the customer can add additional categories using the Attendance Code Categories screen.</p> <p>Default Attendance Code Categories: Unexcused Excused Tardy</p>
Attendance Codes (from config template)	Best Practice (Online Guide)	<p>By default, the following attendance codes will be set up for each school. These codes can be adjusted by the customer and additional codes can be added (with the exception of Present (Blank), which is required for the system to function).</p> <p>Default Attendance Codes: <u>Code Name</u> Blank Present UA Unexcused Absent EA Excused Absent UT Unexcused Tardy ET Excused Tardy FT Field Trip OSS Out of School Suspension ISS In School Suspension</p>
Full-Time Equivalencies (FTE) (video for editing default)	Best Practice (Online Guide)	<p>By default, the following FTE will be set up for all schools. The customer can edit this FTE or add additional FTE's as needed (ex. Part Time) on the Full-Time Equivalencies screen.</p> <p>Default FTE: FTE Name: Full Time Conversion Method: Code-to-Day (for elementary schools) Conversion Method: Percent Time-to-Day (for middle/high/combo)</p>

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Sub Sign-In Settings (implementation setup page)	Best Practice (Online Guide)	<p>By default, the Sub Sign-in Password for all schools will be set to: subattendance (with current date enabled)</p> <p>Default Sub Sign-In Password: ##subattendance (Example password for a sub signing in on October 11 to take attendance: 11subattendance)</p> <p>The customer can then edit this setting on the Sub Sign-In screen. _</p>
Log Entry Fields	State or System Defaults Only	<p>If required by state compliance, the required fields will be set up. Otherwise, log entry fields and codes can be adjusted by the customer on the Log Entry Fields screen.</p>
Test Scores (ACT, SAT, PSAT defaults only)	Best Practice (Configuration Session)	<p>The following tests and subscores will be set up by default. These tests can be deleted by the customer if they do not apply and additional tests and subscores can be configured by the customer on the Tests screen.</p> <p>Default Tests: ACT (Subscores: Composite, Math, Reading, Science, Social Studies, Writing) SAT (Subscores: Total, EBRW, Math) PSAT (Subscores: Total, Math, Reading, Writing)</p>
Immunizations (state immunizations/vaccines only)	State Defaults Only	<p>If required by state compliance, the required state immunizations will be set up by default.</p> <p>All other immunizations can be configured by the customer on the Health -> Immunizations screen. _</p>
Incident Management (only if required by state reporting)	State Defaults Only	<p>Incident Management is only included if the module is required for state compliance, in which case, the state defaults will be set up.</p> <p>If not required by state compliance, the customer can configure this module post-implementation, but it is not considered in-scope for basic or standard tiered implementations.</p>

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Appendix C

Data Transfer from Legacy SIS

PowerSchool Reviews and Consults Customer How to Import Files

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

Data Imports Templates and instructions will be provided to customers. They will own the process of collecting, importing, and validating their data.	
	Comment/Resources
Student Demographics (active students only)	<p>During the import template overview, an implementation specialist will review the import templates with the customer and demonstrate how to perform the imports using Quick Import (core data) and Data Import Manager (contact data).</p> <p>After the session, it is the customer's responsibility to generate import files with their data, to the exact specifications outlined in the import templates, import the data into PowerSchool, and resolve any errors they encounter due to the condition of their data. Additional import support can be purchased in the form of Consulting hours or Import packages.</p>
Student Compliance Tables	Demonstration Session as part of the State/Provincial Reporting Overview Session
Staff (active staff/teachers)	
Staff Compliance Tables	Demonstration Session as part of the State/Provincial Reporting Overview Session
Courses (active courses)	
Course Compliance Tables	Demonstration Session as part of the State/Provincial Reporting Overview Session
Rooms	
Sections (active school year only)	
Section Compliance Tables	Demonstration Session as part of the State/Provincial Reporting Overview Session
Section Enrollments (active school year only)	
Section Enrollment Compliance Tables	Demonstration Session as part of the State/Provincial Reporting Overview Session
Historical Grades (up to five years for active students)	

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Historical Grades Compliance Tables	Demonstration Session as part of the State/Provincial Reporting Overview Session
Re-enrollments (active students)	
Re-enrollments Compliance Tables	Demonstration Session as part of the State/Provincial Reporting Overview Session
Additional Compliance Tables	Demonstration Session as part of the State/Provincial Reporting Overview Session
Test Scores (ACT/SAT/PSAT only)	
District Learning Standards/Outcomes	
Historical Logs (up to five log types)	
Comment Bank	
Incidents (active students) (only if required by state compliance)	
Immunization (active students) (only if required by state compliance)	
Student Contacts	