PowerSchool

VERMONT
AGENCY OF EDUCATION

VERMONT VASBO

May 11, 2018

Meet Debbie Prette

- **Years working with eFinancePLUS:** 20+

- **Roles:** Sales, PLUS360 Support, PLUS360, Senior Consultant Professional Services, Advisor Professional Services

- **Current Role:** Supervisor, eFinancePLUS Professional Services

- **Knowledge Areas:** eFinancePLUS, BusinessPLUS, IEPPLUS, eSchoolPLUS, PLUS360 Integration, SQL and Cognos

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Vermont Supervisory Unions Mergers

- There are Vermont Supervisory Unions which may be subject to mergers based on Act 46.
  - Example, Barre is currently 4 entities/databases, but could be directed by the State Board to merge to 1.

- What is your recommendation in terms of timing for a conversion to Powerschool?

We are recommending districts move to eFinancePLUS prior to the merge if feasible. This will allow a streamlined transition for District A and District B to District C.

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Vermont Supervisory Unions Mergers

- Around mergers, I am wonder(ing) if you will convert, and if we need to convert, districts that will be non-operational by the PS go live date.
  - One would assume information such as employee and vendor information from merging districts would be brought in, but not bring in all old data.

May require clarification as to "convert" reference above?

Interpretation of above: If the districts are non-operational as in merged prior to go live - we have a few different options depending on the status/timing of the merger. There will be a checklist of steps provided for districts that required these changes due to the mergers.

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Uniform Chart of Account

- Can we accomplish our transition to the new Uniform Chart of Accounts in conjunction with eFinancePLUS implementation?

Absolutely YES!

PowerSchool has a coordinated effort with AOE to establish the new UCOA within eFinancePLUS as part of the pre-configuration process. Proposed setup for UCOA.

FUND	1	101	3
LOCATION	2	0000	4
LEVEL	3	00	2
PROGRAM	4	000	3
PROJECT	5	000	3
FUNCTION	6	0000	4
REVENUE SOURCE	7	0000	4
			23
TYPE (BUILT INTO eFinancePLUS)		1	1
OBJECT		000	3

Leave / Attendance

- How will individual business office systems be reviewed & evaluated during the implementations process to meet individual needs?

  - **Some examples:**

    - 26 Bi-Weekly payroll for hourly employees *Defined in the Pay Rate Screen for each employee*

    - Annualizing contracts vs. weekly or biweekly hourly input based on time sheets *Balanced Contracts are common for all of our eFinancePLUS Customers*

    - Leave account in days vs hours *Leave Setup Preferences – defined in leave table.*

    - Leave accruals -- 1 sick day per working month, 5 vacations days after 6 months,15 vacations days after 3 years *Leave Anniversary Date*

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FMLA / Calendar Year Fixed Year Leave

- FMLA Accounting based on various FMLA options

- Calendar Year Fixed leave year based on _____
  - 12 month period measured forward from the date of your first FMLA
  - A "rolling" 12-month period measured backward from the date of an FMLA leave usage Reports -- Sample "canned reports" & how to write reports in the system, how to use COGNOS.

eFinancePLUS provides a variety of methods for tracking FMLA within the Baseline Application.

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Reporting in eFinancePLUS

- Baseline Reports
  - Common reports needed/used, including how to "roll-up" codes by UCOA definitions:
    - Trial Balance
    - GL Details in total and/or by account
    - Budget reports
    - Bank Reconciliations
    - Open PO reports
  - How is payroll dated included in GL Details (does the data exist, i.e. employee earning by name or batch per payroll)
  - Warrants/order report

eFinancePLUS includes the above requested reports in the baseline report listings.

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Reports Request from Vermont Districts

- Which reports will Powerschool be able to produce "at the push of a button" instead of requiring exporting and formatting of information by staff?
  - Statbook (including worksheet information)?
  - Special Education Expenditure report (including worksheet information)?
  - Grant financial reports?
  - Health Care contribution report?
  - Grant-funded teacher retirement report?
  - Teacher OPEB contribution report?
  - Teacher-Staff Salary Survey?
  - June budget report?
  - Medicaid Administrative Claiming (EPSDT)report?
  - Medicaid Reinvestment report?
  - Indirect cost-rate application?

PowerSchool is coordinating with AOE representatives on the reports required for the state of Vermont. Required Reports for our states are accessible via a State Reporting Option or within Cognos.

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Purchasing

- Districts have different practices:
  - Districts require a PO for all purchases and will move funds through a budget adjustment practice for every penny in different (?).
  - District will have different rules when a PO is needed vs. when a payment can/will be made without a PO.
  - How and when are both commitments posted to the GL, real time, batch etc.?

Each district will have the ability to define their own Workflow Practices however it is recommended / advised that all districts utilize the Requisition Process within eFinancePLUS. Our experience with past implementations is that customer who follow this recommendation have the greatest success with maintaining the purchasing and budgeting practices.

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Budgets

- How are budgets controlled with and without budget adjustments -- Is the control available at both the PO level and the accounts payable/invoice level?
  - By line item
  - By group of lines/departments or another feature - i.e.. objects

There controls across all of eFinancePLUS which assist Business Managers with maintaining their budgets. During the implementation process these controls are introduced to the Business Managers as best recommendations. Vermont has requested a uniform methodology for these controls where possible to provide best result for Budget Maintenance.

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Vermont Information Sharing

- Sharing Capabilities of Public Information – Negotiations
    - In negotiations we are OFTEN behind the NEA with information on salary schedules and other employee benefit options.
        - We do not have a data warehouse of this public information, and if we did, it would need to be formatted for searching capabilities.
        - This system may be a prime opportunity where the data is captured and available for Boards in negotiations -- without having to contact multiple district (interrupting their day and requiring their time) capturing and organizing all the data (currently it MUST come in piecemeal district by district --resulting in wait time before it can be captured)

- How can public information be shared across uses?
    - Perhaps thought read only access?
    - Perhaps a request to the AOE who has access - but may or may not have staff to capture & share data?

PowerSchool and AOE have taken this request under advisement and they are currently researching the ability to create a "warehouse" of salary data.

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Wrap Up

- *Q & A*
- *Next Steps*
- *Who do we contact?*
  aoe.ssddms@vermont.gov or 802 479-1026