



eCollect Form Building for Powerschool Admins

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eCollect Forms

AN OVERVIEW OF FEATURES AND USES

Forms Overview

- The South Carolina Department of Education (SCDE) purchased eCollect as a statewide service to administer surveys to parents, students, and teachers.
- Create, edit, and share online forms right from within PowerSchool SIS
- Features include:
 - Data Collection & Tracking
 - Engagement & Family Participation
 - Data Security
 - Mobile Access

How can you use eCollect?



You can take any existing paper form and convert it to an electronic form.



You can publish your electronic form to the parent portal, student portal, and/or PowerTeacher portal.

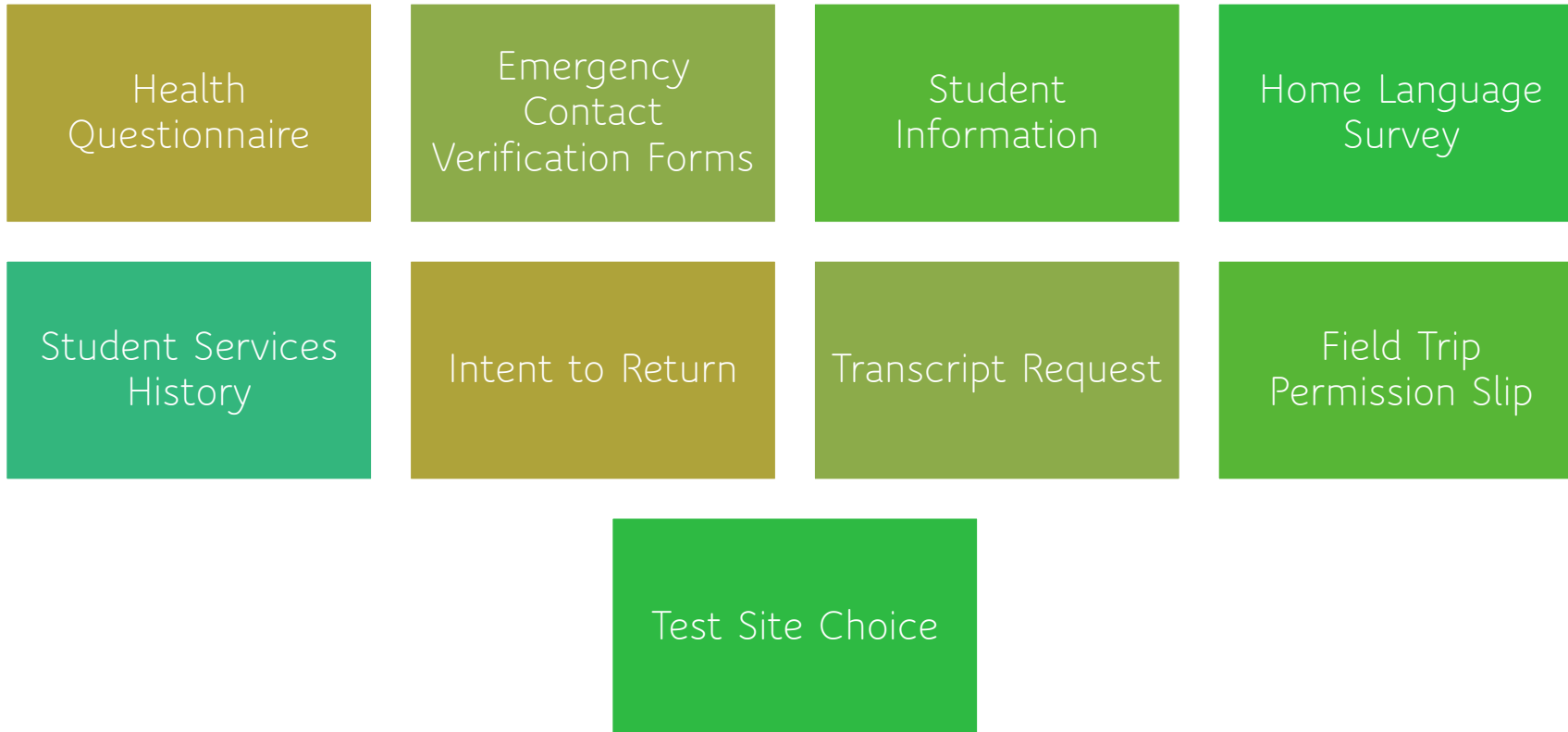


Fields in the form can be directly linked to PowerSchool fields. No need for manual data entry of form data.



Approvals and Notifications

eCollect Template Examples





Build a Form

An Overview

Preparation and Login

1. Login to PowerSchool SIS

For Training, CIE's Test Server:

<https://207.192.88.92/admin/pw.html>


Should be able to use the same login from PowerSchool.



2. Go to **Forms** under applications.

My Forms

District Forms

These forms are owned by you.

 New Form

Form Name	Description	Category	Owner	Type	Publish		
[E-Learn] E-Learning Consent and Expectations TRAINING	This form is for training purposes only.		Roach, Jennifer J.	Collaborative - Student	Yes		

Preparation and Login

Forms

My Forms

These are forms that I own or are creator.

District Forms

Includes Two Sets of Forms:
Forms I Own & Do Not Own. Cannot Edit or Delete
Forms You Do Not Own

Creating New Form

Build

Build New Form from
Scratch

Copy

Copy Form that You
Own

Sync

Sync Forms (District
Function)

Create a New Form: Create New

Student

Interacting with Student Tables, Core Fields + their extensions.

Teacher

(User Form) Interacting with User & Staff Tables + their extensions. Includes all Non-Student and Non-Contact Entity (Admins, District Staff, Teachers, etc.)

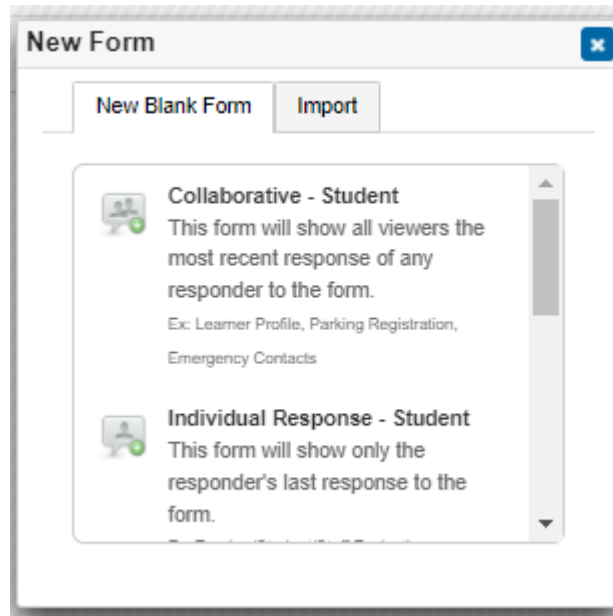
General Survey

Does not interact with PowerSchool Data. No Data linking. Can be anonymous.

Great for Course Reviews & Climate Surveys.

Create a New Form: Create New

- Go to Form Dashboard
- Click New Form
 - Stay in “New Blank Form” Tab



Create a New Form: Create New

Collaborative

Most forms are collaborative. All users involved in form work together to curate a data set. Similar to Google Doc you work together on.

Can go through approval process - this is required for ANY data writing back to PowerSchool, with very few exceptions. Misuse can and will lead to termination of access.

Individual Response

Divides users in silos. Each user comes to a blank form to fill out on user (student/teacher).

Example: You want feedback from each parent for one student.

Create a New Form: Create New

- Select Collaborative – Student
- *Live Demo*
<https://207.192.88.92/admin/home.html>

Form Properties

- Click Header to See All Form Properties
 - Title – updates in real time
 - Description – updates in real time
 - Success Message – show to parents or users once form is submitted. Default message is: Thank you for your submission.
 - Category – dynamically rendered; i.e. eCollect will check to see if category already exists. If it exists, it will group it with other forms. If not, it will create the category.
 - Options:
 - Publish
 - Approval
 - Notification

Form Properties

- Options:
 - Publish – form is active/inactive
 - Approval – a way to ensure accurate data before it's pushed into SIS; can add password
 - Notification – enter one or more email addresses (with comma and no space) to notify each time form is submitted
 - Anonymous – Only available on General Surveys
 - Restrict to Submit Once – Collaborative Forms will allow single response per student or teacher. Individual response forms will allow one response per responder.
 - Disable Submit for Family – Removes submit for family; only available on student form types
 - Clear Form on Submission – User is always presented with blank form. Does not include elements from PS fields. Elements will populate from what is currently in PowerSchool.
 - Share Permissions
 - Reset Form – Indicate when a form is reset. Once it is reset, it will be as if never submitted. Will not be on response report, but data will be archived.

Form Properties

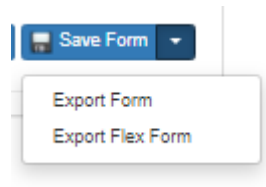
- Options:
 - Owned By - This value is set automatically when a new form is saved or synced for the first time. If you need to pass ownership of the form to another user, select that user from the list and save the form.
 - Next Form - By default, this value is not set. When the form is submitted by an end user, it will reload the same form. If you would prefer a specific form to load after the current form is submitted, choose that form from the list. The list contains all forms owned by the current user.

Create a New Form: Import

- Live Demo
- <https://207.192.88.92/admin/home.html>
- Download File Sent Via Email

Create a New Form: Import

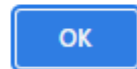
- Go to Form
- Click Carrot (Next to Save Form)



- Export Form
- Click OK

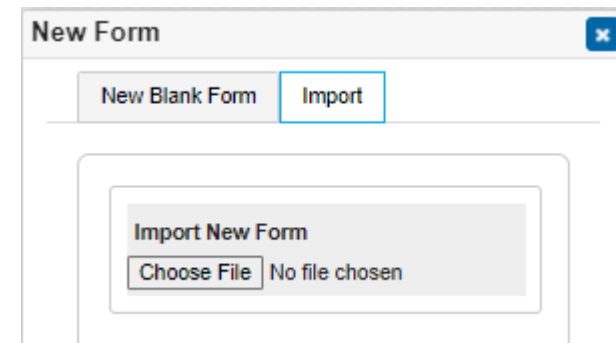
cie.powerschool.com says

Minimum Version is ECO_21.11.1.0



Create a New Form: Import

- Will Download File
- Go back to Dashboard and Click New Form
- Go to Import Tab and Choose Newly Downloaded File
- Will Open in Edit Mode
 - Change Title
 - Unpublish (if applicable)
 - Save Form
- Click Edit Form to Make Changes



Publish Form

- Publish Checkbox
- Share Permissions : School Tab
 - Global Portal Settings – decide who has access & what type.
 - Pencil: Full Access – Load, Edit Elements on Form, Submit Button
 - No Symbol – Form is Off for this User Portal.
 - Eyeball – View Only (See Form, Cannot Change Data or Submit)

School Level Sharing:

Global Portal Settings

 Parents  Students  Admins  Teachers

Use global setting for selected schools Customize portal settings

Schools

- Apple Grove High School
- Apple Grove High School 2

Publish Form

- Schools

- Check Each School Form Applies to

School Level Sharing:

Global Portal Settings

 Parents  Students  Admins  Teachers

Use global setting for selected schools Customize portal settings

Schools

- Apple Grove High School
- Apple Grove High School 2

Publish Form


- Student Tab
 - Can Limit Form Even Further
- Default is All Students in Selected Schools
- Previously Selected Students
- Filter by PowerSchool Field

Role Sharing

Role based permission, user group access, and School portal form sharing.

School

Student

 Admin

Shared with:


- All Students in Selected Schools
- Existing Selection [23] 
- New Selection [52] 
- Filter Students by PowerSchool Field

Role Sharing

Role based permission, user group access, and School portal form sharing.

School

Student

 Admin


Shared with:

- All Students in Selected Schools
- Existing Selection [23] 
- New Selection [52] 
- Filter Students by PowerSchool Field

Field Condition:

PowerSchool Field: Operator: Value:

Grade_Level 

>= 

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Publish Form

- Admin Tab

- Can restrict view & submit

Role Sharing

Role based permission, user group access, and School portal form sharing.

School

Student

 Admin

User Group Access:

Click Group Access header to expand options. Any group not defined here will have no access to form.

Group Access: Administrator

Group Access: Counselors

Group Access: Registrar

Group:

Registrar

Access:

View and Submit

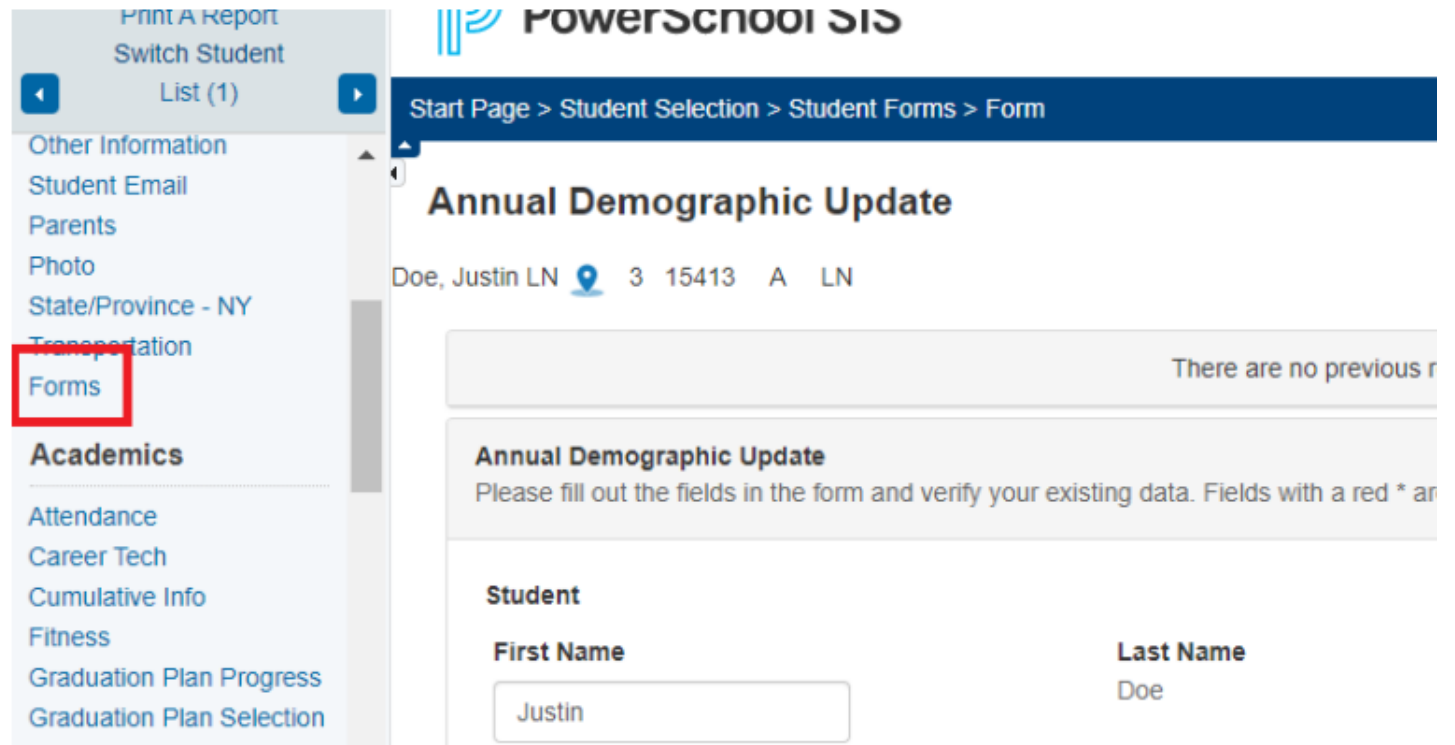


Form Access

<https://ed.sc.gov/data/information-systems/power-school/sis-documents/ecollect-portal-access-sc/>

Form Access: Student Forms

- Sign into PowerSchool Admin Account
- Select Student, Go to **Forms** under Information



The screenshot displays the PowerSchool SIS interface. On the left, a navigation menu lists various options, with 'Forms' highlighted in a red box. The main content area shows the 'Annual Demographic Update' form for student Justin Doe. The breadcrumb trail at the top reads 'Start Page > Student Selection > Student Forms > Form'. The form title is 'Annual Demographic Update' and the student information is 'Doe, Justin LN'. Below the title, there is a message: 'There are no previous r'. The form instructions state: 'Please fill out the fields in the form and verify your existing data. Fields with a red * are'. The form fields are organized under the heading 'Student'. The 'First Name' field contains 'Justin' and the 'Last Name' field contains 'Doe'.

Form Access: Student Forms

- You will see an overview of Forms and the Status (example)

SCDE - Technology Survey

[Student Broadband Access Survey](#)

Please respond to the questions below regarding your student's access to technology for completing coursework.

 Empty

Legend

Icons  - Form Empty  - Form Approved / Populated  - Form Not Approved  - Form Rejected

Form Access: Student Forms

Click on Form

- View responses
- Edit &/or Submit Responses on Behalf of Family/Guardian/Student

Save for Later

Submit

Student Broadband Access Survey

Please respond to the questions below regarding your student's access to technology for completing coursework.

Can the student access the internet on their primary learning device at home *

- Yes
- No - Not Affordable

What is the primary type of internet service used at the residence? *

- Residential Broadband (e.g., DSL, Cable, Fiber)
- School Provided HotSpot
- Dial-up
- None

Can the student stream a video on their primary learning device without interruption? *

- Yes -No issues
- Yes -But not consistent
- No

What device does the student most often use to complete school work at home? *

- Desktop/Laptop
- Chromebook
- None

How many hours per day can the student spend on the primary learning device? *

- Unable to use the device at home Limited Access 1-2 hours
- Limited Access 1-2 hours
- Medium Access 3-4 hours

Parent/Guardian Access

- Login to their Parent Portal
- <https://207.192.88.92/public/home.html>

Navigation

- Grades and Attendance
- Missing Assignments
- Assignment Calendar
- Grade History
- Attendance History
- Email Notification
- Teacher Comments
- Forms**
- School Bulletin
- Class Registration
- IGP Success Viewer
- Curriculum Browser
- Balance
- My Schedule
- School Information
- Digital Equity and Learning Preference
- Account Preferences

Grades and Attendance: Doe, Joh

Grades and Attendance

Exp	
P2(A)	English 3 Email
P3(A)	Algebra 2 Email
P4(A)	US Histor Email
P6(A)	French II Email
P7(A)	Chemistr Email
P9(A)	Learning Email
ATT(A)	Homeroo Email

School Form Listing for Doe, John

Your preferences haven't been configured.

To configure if and how you'll receive notifications for forms, please use the button below to set your preferences.

General Forms Class Forms Student Support

SCDE - Technology Survey

Student Broadband Access Survey

Please respond to the questions below regarding your student's access to technology for completing coursework.

Legend

Attendance Codes: Blank=Present | SC-UNEX=Unexcused/Unverifi
HMBD=Homebound | SC-HBSD=Homebased Instruction | SC-FT=Pie
Family | SC-DSML=Dismissal | SC-EDSM=Early Dismissal | SC-UEDI

Staff Access: Admin

- Navigate to your staff record
- Select Faculty Forms
- Click Form to Complete

The screenshot displays the PowerSchool SIS interface. On the left is a yellow navigation sidebar with the following sections:

- Search Staff List (1)
- SwiftK12 Alerting
 - Staff Preferences
- Standard Screens
- Functions
 - Current Schedule Information
 - Certification
 - Print a Report
 - Photo
 - Schedule Setup
 - Schedule Matrix
 - Security Settings
 - Transactions
 - PowerTeacher Pro
 - BrightArrow
- Custom Screens
 - Random Test
 - Forms** (highlighted with a red box)
 - Faculty Forms
 - Faculty Calendar

The main content area has a blue header with the PowerSchool SIS logo. Below the header, the breadcrumb trail reads "Start Page > Teacher Schedule - Roach, Jennifer J. [redacted]". The page title is "Teacher Schedule - Roach, Jennifer J. [redacted]". There is a checkbox labeled "Display today's sections" which is currently unchecked. Below this, the text "Current School - South Carolina Virtual Charter School" is displayed. At the bottom, a table header is visible with columns: a checkbox, "Expression", "Term", and "Course #".



Approval Process

1

Need to review submission before the data is updated in PowerSchool - *Required by CIE*. Consequences if school does not abide by policy.

2

Need to review in order to reject or approve, like Course Change Request. May or may not be linked to PS field.

3

Keep track of responses that you have reviewed; not necessarily linked to a PowerSchool field, but multiple staff members must review a form/s.

Approval Process Scenarios

Approval Process

- To enable the approval process, must open form in Edit Mode.
 - Form Level Property: Click on Form and then the top Title Bar
- Property Under Publish:



Options

- Publish
- Approval

123

[Link](#)

- Checking Approval will Open Password Box
 - Approver will need to know password

Approval Process

- Approval Chain (Click)
 - Indicates how many approvers will need to review form before form can be approved and PowerSchool field updated.

Options

Publish

Approval

Approval Options
Set options for approval of form response.

Approval Chain:

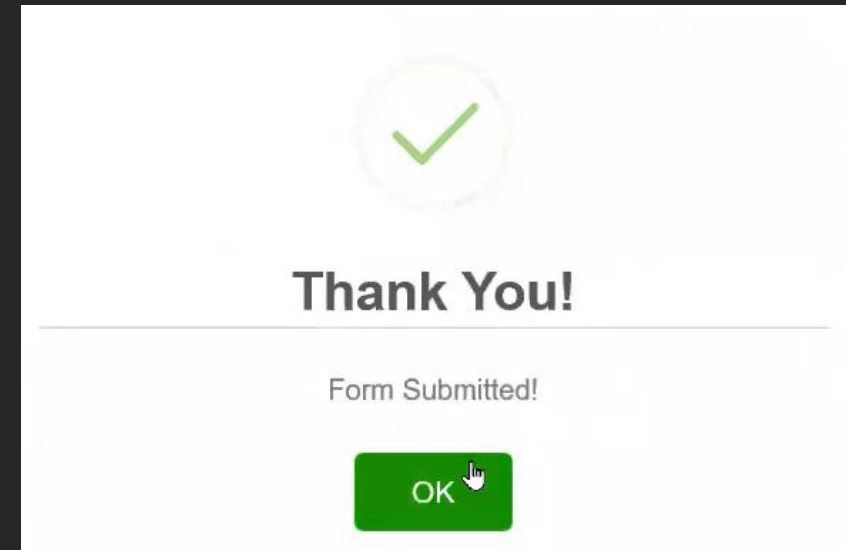
Response to be approved by this many users:

1 2 3 4 5

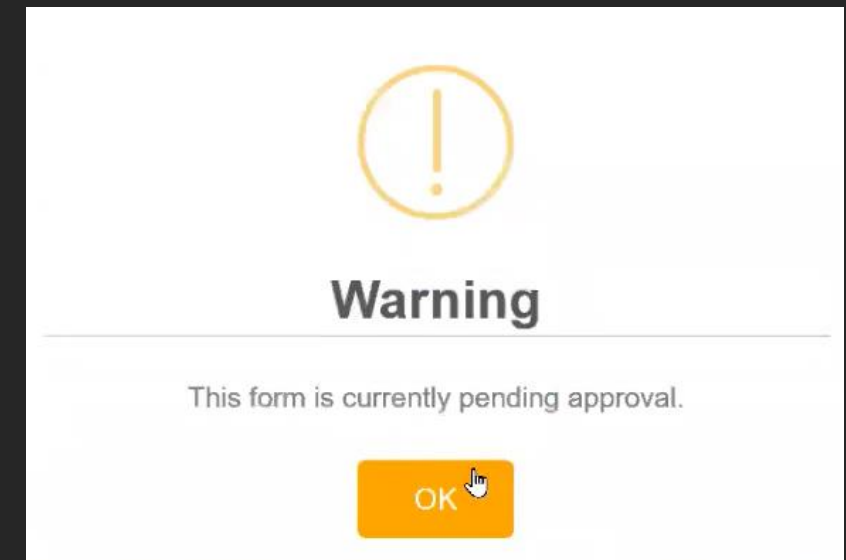
- Any submissions made through the **admin portal** will *bypass* approval since PS Admin has direct access to the PS fields in the SIS.
- By default, any submissions made to the student through the enrollment school will not have to go through process since there is no pre-existing data that you have to worry about being overwritten.



Approval Process

- When parent fills out a form that has an approval process, they will receive the default submittal success message:



- And then receive an additional notification that the submission is pending.



Status	Form Name	Form Description	Category	Last Entry
 Pending	A - Student Change of Address		Training	2020-03-12 16:51:50.0
 Empty	B - Student Absence Form	Please fill out if your student will be absent or late for any reason.	Training	

Approval Process

When parent returns to Forms page, the status will be Pending and the form will be highlighted yellow.

Forms

Search forms...

Athletics

Status	Form Name	Form Description	Category	Last Entry
Empty	Athletics Registration Form		Athletics	
Empty	Medical History		Athletics	
Empty	Waivers and Acknowledgements		Athletics	

Training

Status	Form Name	Form Description	Category	Last Entry
Pending	A - Student Change of Address		Training	2020-03-12 16:51:50.0
Empty	B - Student Absence Form	Please fill out if your student will be absent or late for any reason.	Training	
Empty	C - Student Contacts		Training	

Approval Process: Admin Approval


ADMIN > GOES TO
STUDENT > FORMS

Approval Process: Admin Approval

- WHEN YOU CLICK ON FORM, IT WILL BRING UP THE SAME WARNING BOX THAT FORM IS PENDING APPROVAL.

- Student Absence Form C - Student Contacts Student Information Update

ict :ted) Pho .3547



Warning

This form is currently pending approval.

OK

New State New Zip Cod

Approval Process: Admin Approval



- ADMIN SEES SAME RED FLAG; CAN HOVER TO SEE CHANGES.
- ADMIN CANNOT EDIT SUBMISSION OR MAKE NEW RESPONSE UNTIL THEY HAVE APPROVE/REJECTED

A - Student Change of Address

Information on file with the District

Address 1678 Indiana Avenue Citrus Heights, CA 95126	Mailing Address 1678 Indiana Avenue Citrus Heights, CA 95126
---	---

Address

New Street  

1678 Indiana Ave

New City Citrus Heights

New State California

Primary Phone

Reject

Approve

Approval Process: Admin Approval

- IF ADMIN SEES ERROR IN RESPONSE, ADMIN CAN REJECT RESPONSE AND REQUIRE PARENT TO MAKE FIX OR APPROVE AND FIX
- ONCE APPROVED, BACKGROUND RETURNS TO WHITE
- FORM STATUS BECOMES APPROVED

Approve Response

Approval Options:


Approver: Override

Password: *



Thank You!

Successfully approved response.

Status	Form Name
 Approved	A - Student Change of Address

Approval Process: Admin Approval

- YOU CAN ADD REASON/NOTES TO REJECTED RESPONSES

Reject Response

Approval Options:

Approver: z31, Erin **Override**

Password: * ...


Reason/Note: This is not a valid address

Max 550 Characters

Reject **Cancel**

Approval Process: Admin Approval

- THE REASON WILL BE DISPLAYED TO PARENT WHEN THEY REVIEW REJECTED FORM

Status	Form Name
 Rejected	A - Student Change of Address



Rejected Response

This form response has been rejected. **Please spell out the full street name.**

[Edit Rejected](#)

Form Reports

Name

Signature

Date



Example:

Form Reports

Login to PowerSchool Admin >
Form Report under Reports
Header

Reports


Response Reports

Other Reports

Search by name or description

All categories

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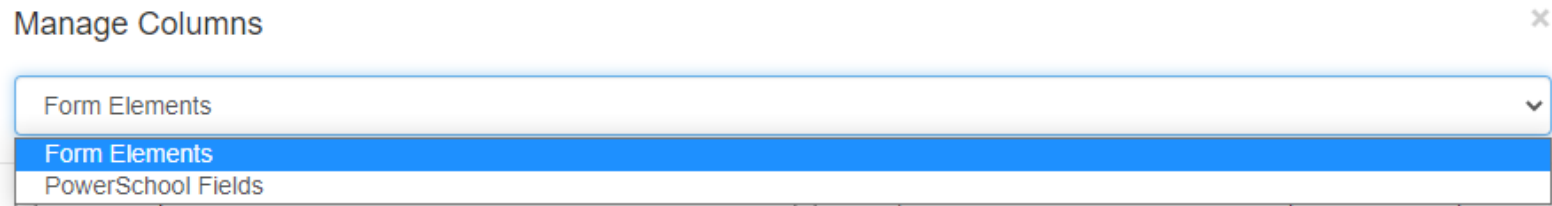
Title 	Description	Category	Responses
A. Welcome/Intro		First Day Packet	65 responses
C. Health Questionnaire		First Day Packet	75 responses (75 pending, 0 approved, 0 rejected)
D. COVID 19 Parent Waiver		First Day Packet	15 responses
E. Parent, Guardian and Emergency Contacts Verification		First Day Packet	17 responses (17 pending, 0 approved, 0 rejected)
G. Parent Consent		First Day Packet	15 responses
H. Parent Obligation		First Day Packet	15 responses
I. Handbook Acknowledgement		First Day Packet	15 responses
F. Transportation Information SC		First Day Packet	15 responses (15 pending, 0 approved, 0 rejected)
B. Student Information		First Day Packet	18 responses (18 pending, 0 approved, 0 rejected)

Form Reports Export

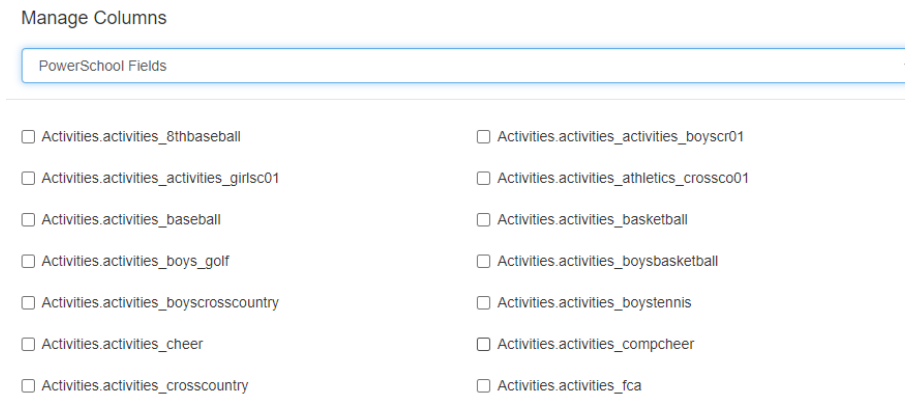
- Click on Form
- Filter by:
 - Data Source (Person or Response)
 - Filter Data
 - Approval Types (All approval types, Pending approval, Approved, Rejected)
 - Response Types (Current Responses, Current Selection Responders, Current Selection Nonresponders)
 - Date Range
 - Show Archived Responses (optional)
 - Export Options
 - Export All
 - Export Selected

Form Reports Export (cont.)

- Add Column Button (optional)

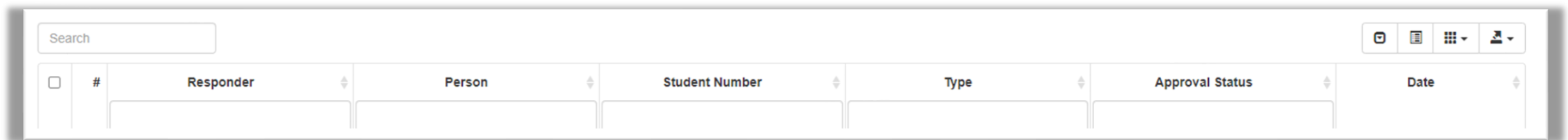


- Form Elements
- PowerSchool Fields



Form Reports Export (cont.)

- Click Generate Report
 - Will populate:
 - Responder
 - Person (student/teacher/guardian)
 - Student Number (PowerSchool ID)
 - Type
 - Approval Status
 - Date (Timestamp)
 - You can click “Person” or “Student Number” to See Individual Responses for Student/Teacher/Guardian



The screenshot shows a data table interface. At the top left is a search bar with the text "Search". To the right of the search bar are four icons: a magnifying glass, a document, a grid, and a printer. Below the search bar and icons is a table with the following columns: a checkbox, a column labeled "#", a column labeled "Responder", a column labeled "Person", a column labeled "Student Number", a column labeled "Type", a column labeled "Approval Status", and a column labeled "Date". Each column header has a double-headed arrow icon next to it, indicating that the columns are sortable.

<input type="checkbox"/>	#	Responder	Person	Student Number	Type	Approval Status	Date
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Form Reports Export (cont.)

- Search Bar
 - Search by Any Element (Name, Responder, Type, Approval Status)

C. Health Questionnaire Responses

Show archived responses

Schools All Schools School Selection

Export Options

Form Reports Export (cont.)

- Tool Bar



Hide/Show Pagination (Hides page data at bottom)

Showing 1 to 25 of 28 rows rows per page

Toggle (Changes View)

Columns (Add'l Filter)

Additional Options (Export File Choice, Make Current Selection, Approve/Reject)

- JSON
- XML
- CSV
- PDF
- Make Current Selection
- Make Checked Current Selection
- Approve Selected
- Reject Selected

- Responder
- Person
- Student Number
- Type
- Approval Status
- Date
- IP Address



help@canteytech.com
