



PowerSchool Group LLC  
 150 Parkshore Dr., Folsom, CA 95630  
 Quote #: Q-470276 - 2

Quote Expiration Date: 1/13/2021

Prepared By: Nathan Smallwood  
 Customer Name: Warren County School District  
 Enrollment: 4,009  
 Contract Term: 42 Months  
 Start Date: 1/1/2021  
 End Date: 6/30/2024

Customer Contact: Paul Leach  
 Title: Data Systems Specialist  
 Address: 6820 Market Street  
 City: Russell  
 State/Province: Pennsylvania  
 Zip Code: 16345  
 Phone #: (814) 723-8217 x 1219

Product Description	Quantity	Unit	Extended Price
<b>Initial Term 1/1/2021 - 6/30/2021</b>			
<b>License and Subscription Fees</b>			

UT Applicant Tracking	4,009.00	Students	USD 1,590.42
UT SchoolSpring Job Board Unlimited	4,009.00	Students	USD 318.08
Unified Talent Records	4,009.00	Students	USD 5,009.82
Unified Talent (TalentEd) Perform District	4,009.00	Students	USD 5,009.82
Unified Talent (TalentEd) Professional Learning	4,009.00	Students	USD 3,339.88

License and Subscription Totals: **USD 15,268.02**

<b>Professional Services and Setup Fees</b>			
Unified Talent Applicant Tracking Implementation - Basic	1.00	Each	USD 2,375.00
Unified Talent Records Implementation - Basic	1.00	Each	USD 3,800.00
Unified Talent (TalentEd) Sync Implementation	1.00	Each	USD 0.00
Unified Talent Perform Implementation - Basic	1.00	Each	USD 3,562.50
UT Professional Learning Implementation - Standard	1.00	Each	USD 4,987.50
PowerSchool Talent Keys to Ownership	10.00	Hours	USD 2,100.00

Professional Services and Setup Fee Totals: **USD 16,825.00**

<b>Training Services</b>			
UT Professional Learning Training Remote	1.00	Day	USD 1,500.00

Training Services Total: **USD 1,500.00**

<b>Quote Total</b>	
<b>Total Discount:</b>	<b>USD 4,592.01</b>
<b>Initial Term</b>	<b>1/1/2021 - 6/30/2021</b>
<b>Initial Term Total</b>	<b>USD 33,593.02</b>

Annual Ongoing Fees as of 7/1/2021

UT Applicant Tracking	4,009.00	Students	USD 3,207.20
UT SchoolSpring Job Board Unlimited	4,009.00	Students	USD 641.43
Unified Talent Records	4,009.00	Students	USD 10,102.68
Unified Talent (TalentEd) Perform District	4,009.00	Students	USD 10,102.68
Unified Talent (TalentEd) Professional Learning	4,009.00	Students	USD 6,735.12

Annual Ongoing Fees Total: **USD 30,789.11**

Fees charged in subsequent periods after the duration of this quote will be subject to an annual uplift. 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 paid before or on the due date set forth on 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/wp-content/uploads/PowerSchool-Service-Agreements/PowerSchool%20MSA%20update%2012.1.2020.pdf>

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: 12-15-2020

Warren County School District

Signature:

\_\_\_\_\_

Printed Name:

\_\_\_\_\_

Title:

\_\_\_\_\_

Date:

# Statement of Work

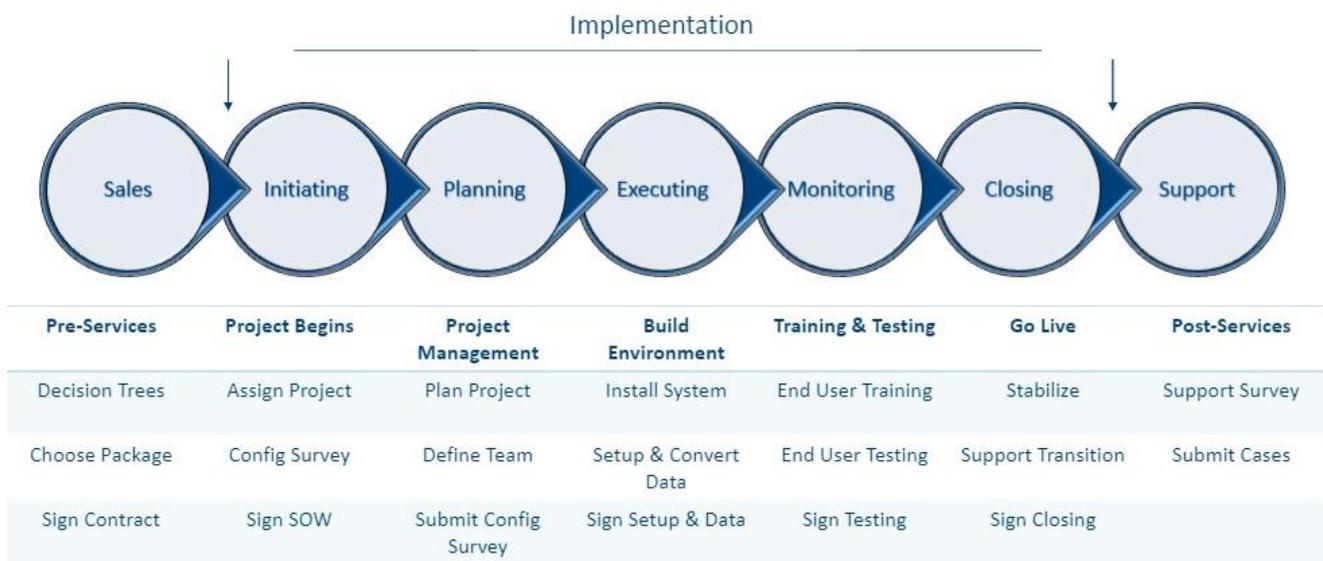
## Purpose of Document

The purpose of this Statement of Work (“SOW”) between PowerSchool Group LLC (“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 delivered by an experienced team of education experts, designed to ensure Your PowerSchool deployment project meets Your unique needs and expectations. This Statement 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. 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. (“Contract”)



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## 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.
3. Services identified are for PowerSchool start up and do not include customizations. Services are available through the PowerSchool Product Tailoring for additional fees.
4. Implementation is for one (1) academic year only which will be designated during the planning phase of project. Summer school setup is not included.
5. 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.”
6. Customer must identify a designated Customer project lead before the project kick-off meeting. The Customer project lead will be responsible for delivering all the above mentioned “Customer Responsibilities” in a complete manner within the project timeline.
7. 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.
8. 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.
9. Customer will provide PowerSchool with remote access to systems, as required.
10. The PowerSchool implementation specialist will point Customer to available procedures, guidelines, standards, reference materials and system/application documentation.
11. Other items outside of the Statement of Work may need to be planned for by the Customer prior to go live.

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# 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 four (4) 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 four (4) 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 four (4) 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 four (4) 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.

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# 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

- **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 – [servicespmo@powerschool.com](mailto:servicespmo@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.

# Professional Learning Standard Statement of Work

## Initiating (Pre-requisites before Planning)

### PowerSchool Responsibilities

- Send Welcome Email with Statement of Work
- Schedule and conduct introductory meeting
  - Standard Model is ninety (90) calendar days from the date of the kick-off meeting
- Identify PowerSchool Project Team
  - Project Manager
  - Application Specialist
- Send Customer access to the following:
  - Statement of Work
  - Intake Survey
  - Decision Documents
  - Import file layout and supporting documentation for HRIS and transcript imports
  - Authentication Discovery Documents

### Customer Responsibilities

- Attend introductory meeting and any subsequent meetings as required
- Identify Customer Project Team
  - Project Manager
  - Subject Matter Expert(s)
  - IT | Data Lead Specialist
- Review and approve Statement of Work
- Complete Intake Survey
- Review authentication document and import file layout/guide
- Review Decision Documents

### Completion Criteria

This activity will be considered complete when:

- Project team identified
- A customer intro call is complete
- Documents Delivered
- Intake Survey is complete
- Customer signs off Statement of Work

# Planning

## PowerSchool Responsibilities

- Schedule and conduct an import discussion
  - Review file layout documents and examples and provide consultative services to guide customer on extracting data from their HRIS system to PowerSchool in the provided templates and format.
  - Make best practice recommendations on roles, resources, and views
- Schedule and conduct a kickoff meeting
- Schedule and conduct a decisions review discussion
- Schedule the implementation and training resources based on project timeline and statement
- Update the Project Plan to include implementation timing and resources
- Schedule regular Working Sessions or Status Calls as needed

## Customer Responsibilities

- Attend Kick-off, Import and all subsequent meetings and training required
- Attend decisions review meeting and all subsequent meetings if schedule
- Complete the PowerSchool decision documents based on information gathered from key stakeholders, including:
  - Authentication
  - Import layout decisions (personnel and transcript)
  - Configuration Decisions
  - Provide Supporting documents (i.e. forms, handbooks)
  - Provide Workflows
- Manage business process change
- Plan for training and ensure users attend required training sessions
- Update the Project Plan to indicate client tasks completed

## Completion Criteria

This activity will be considered complete when:

- The import and kickoff meeting are completed
- The configuration decision meeting is completed
- Customer completes decisions documents
- The Project Plan is updated based on discussed timelines
- Authentication document is completed and delivered

## 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, PowerSchool 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 implementation 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 SSO
- Configure AppSwitcher with current and new PowerSchool products

### Customer Responsibilities

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

### Completion Criteria

- Customer signs the final checklist that Authentication Services are complete

## Executing

### PowerSchool Responsibilities

- Production site set-up
- Schedule and conduct working sessions
- Configuration set up for the purchased Professional Learning package
- Provide PowerSchool deliverables in the agreed upon timeline to avoid impact on the project timeline
- Personnel Imports using the provided templates from District systems
  - Timeframe identified
  - Validate data format and coordinate data import as needed
  - Review System Configuration and Data imports in Customer working session

### Customer Responsibilities

- System Configuration
  - Attend working sessions and status meetings as scheduled.
  - Review and verify Configuration throughout the duration of the project and obtain concurrence from key stakeholders
  - Manage business process change throughout the project
  - Provide Customer deliverables in the agreed upon timeline to avoid impact on the project timeline
  - If deliverables are not provided in the agreed upon timeline, a revised timeline will be provided with new agreed upon deliverable dates and go live dates

- Data imports
  - Attend data review call(s)
  - Evaluate the hierarchy and functional roles for staff
  - Align staff to the correct group and role utilizing best practice recommendations
  - Personnel Data:
    - PowerSchool System of Record (SIS/ERP/BP) to Professional Learning
      - Attend and clarify questions for PowerSchool to facilitate the integration of data.
      - Install plug-ins where applicable
      - Validate data
    - Third-Party System of Record to Professional Learning
      - Extract Personnel data from existing systems and provide in the requested format
  - Extract Transcript data from the legacy system and provide it in the requested format.
    - *If historical data cannot be provided during the agreed timeline, the system will be configured to accept the data which can be imported later.*
  - Responsible to review and confirm the accuracy of the imported data and obtain concurrence from key stakeholders
  - Responsible for the final verification and provides signoff data import is accurate and complete

## Completion Criteria

This activity will be considered complete when:

- The system configuration is complete
- Personnel imports have been processed, validated and system is setup to import automated uploads when ready
- Customer provides system configuration completion acknowledgement
- Customer provides data import completion acknowledgement

## Monitoring

### PowerSchool Responsibilities

- Provide guidance for user acceptance testing and basic testing procedures
- Provide Overviews with Customer:
 

<ul style="list-style-type: none"> <li>○ PD Management System</li> <li>○ Instructor Led/Self-paced set-up</li> <li>○ Professional Learning Community</li> <li>○ Course Completion Survey</li> <li>○ Transcript Credit Request</li> <li>○ Discussion Boards</li> </ul>	<ul style="list-style-type: none"> <li>○ SCORM support</li> <li>○ Course Search Set-up</li> <li>○ PD Playlists</li> <li>○ Mobile App for Attendance</li> <li>○ Badging</li> <li>○ Course Approval</li> </ul>
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## **Customer Responsibilities**

- Attend all working sessions and complete/review configuration
- Attend all recorded training sessions including in package
- Complete User Acceptance Testing of the system configuration
- Log and Follow Up on Support Cases as needed
- Manage process change throughout the project
- Coordinate and host training session(s)
- Report critical issues to your implementation team
- Update the Project Plan to indicate client tasks completed

## **Completion Criteria**

This activity will be considered complete when:

- Customer has attended all working sessions and other scheduled calls
- Customer has attended training included in package
- Customer has completed the User Acceptance Testing

## **Closing**

### **PowerSchool Responsibilities**

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

### **Customer Responsibilities**

- Review completed project deliverables
- Complete final project deliverables document signoff
- 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

# Applicant Tracking Basic 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

### Customer Responsibilities

- Identify Customer Project Team
  - Project Manager
  - Subject Matter Expert(s)
- Review Statement of Work

### Completion Criteria

This activity will be considered complete when:

- Customer signs off Statement of Work

## Planning

### PowerSchool Responsibilities

- Schedule and conduct a kick-off meeting
  - Basic Model is seventy-five (75) 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 trainings throughout the project to stay up to date
- Plan for training and ensure users attend required training sessions
- Update the Project Plan to indicate client tasks completed

### 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, PowerSchool 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 implementation 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 SSO
- Configure AppSwitcher with current and new PowerSchool products

## Customer Responsibilities

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

## Completion Criteria

- Customer signs the final checklist that Authentication Services are complete

## Executing

### PowerSchool Responsibilities

- Schedule and install the Software
- Provide Security Settings information.
- Configure the following System Settings:
  - Adding locations
  - Adding users
  - Creating user filters
  - Updating candidate portal
  - Building application types
  - Modifying drop-down lists
  - Managing custom forms
  - Creating job templates
  - Defining workflows
  - Posting jobs
  - Evaluating candidates
  - Setting up searches and views
  - Scheduling interviews
  - Sending reference checks
  - Configuring system notifications
  - Calendar integration

### Customer Responsibilities

- System Configuration
  - Complete configuration tasks (including but not limited to the list above)

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- Review and verify configuration, complete signoff

## **Completion Criteria**

This activity will be considered complete when:

- The system has been installed
- Customer completes System Configuration Signoff

## **Monitoring**

### **PowerSchool Responsibilities**

- Schedule and conduct a launch review meeting
- Provide launch documentation

### **Customer Responsibilities**

- Attend all Product Overviews and Training
- Complete end-user testing within the software
- Log and Follow Up on Support Cases as needed
- Report critical issues to your implementation team
- Update the Project Plan to indicate client tasks completed

## **Completion Criteria**

This activity will be considered complete when:

- Customer has attended Product Overviews
- Customer has attended any additional training included in their package
- Customer has completed the launch review meeting

## **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

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## Employee Records Basic 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

#### Customer Responsibilities

- Identify Customer Project Team
  - Project Manager
  - Subject Matter Expert(s)
- Review Statement of Work

#### Completion Criteria

This activity will be considered complete when:

- Customer signs off Statement of Work

### Planning

#### PowerSchool Responsibilities

- Schedule and conduct a kick-off meeting
  - Basic Model is one hundred and five (105) 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 trainings throughout the project to stay up to date
- Plan for training and ensure users attend required training sessions
- Provide Example Forms
- Update the Project Plan to indicate client tasks completed

#### Completion Criteria

This activity will be considered complete when:

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- The kick-off meeting is completed
- The Project Plan is updated based on discussed timelines
- Example Evaluation Forms have been provided

## 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, PowerSchool 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 implementation 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 SSO
- Configure AppSwitcher with current and new PowerSchool products

## Customer Responsibilities

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

## Completion Criteria

- Customer signs the final checklist that Authentication Services are complete

## Executing

### PowerSchool Responsibilities

- Schedule and install the Software
- Provide Security Settings information.
- Provide training and best practices on the following System Settings:
  - Data Import Templates
    - Locations
    - Users
    - Job Types
    - Supervisors
  - Creating Custom Forms – including but not limited to
    - New Hire Documents
    - Benefits Form
    - Employee Separation
    - Action Forms

- Building Checklists
- Facilitating Workflows
- Using System Reports
- Checklist Dashboard
- System Notifications
- Blank Documents
- Contracts

## **Customer Responsibilities**

- System Configuration
  - Complete configuration tasks (including but not limited to the list above)
  - Review and verify configuration, complete signoff

## **Completion Criteria**

This activity will be considered complete when:

- The system has been installed
- Customer completes System Configuration Signoff

## **Monitoring**

### **PowerSchool Responsibilities**

- Schedule and conduct a launch review meeting
- Provide launch documentation

### **Customer Responsibilities**

- Attend all Product Overviews and Training
- Complete end-user testing within the software
- Log and Follow Up on Support Cases as needed
- Report critical issues to your implementation team
- Update the Project Plan to indicate client tasks completed

## **Completion Criteria**

This activity will be considered complete when:

- Customer has attended Product Overviews
- Customer has attended any additional training included in their package
- Customer has completed the launch review meeting

# 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

## Perform Basic 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

#### Customer Responsibilities

- Identify Customer Project Team
  - Project Manager
  - Subject Matter Expert(s)
- Review Statement of Work

### Completion Criteria

This activity will be considered complete when:

- Customer signs off Statement of Work

### Planning

#### PowerSchool Responsibilities

- Schedule and conduct a kick-off meeting
  - Basic Model is one hundred and five (105) 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 trainings throughout the project to stay up to date
- Plan for training and ensure users attend required training sessions
- Provide Example Evaluation Forms
- Update the Project Plan to indicate client tasks completed

## Completion Criteria

This activity will be considered complete when:

- The kick-off meeting is completed
- The Project Plan is updated based on discussed timelines
- Example Evaluation Forms have been provided

## 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, PowerSchool 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 implementation 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 SSO
- Configure AppSwitcher with current and new PowerSchool products

## Customer Responsibilities

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

## Completion Criteria

- Customer signs the final checklist that Authentication Services are complete

## Executing

### PowerSchool Responsibilities

- Schedule and install the Software
- Provide Security Settings information.
- Provide training and best practices on the following System Settings:
  - Data Import Templates
    - Locations
    - Users
    - Job Types
    - Supervisors
  - Creating Custom Forms – including but not limited to
    - Goal Setting
    - Observation
    - Walkthrough
    - Summative

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This edition applies to the current PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates. The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

- Building Processes
- Using Rubrics
- Facilitating Workflows
- Assigning and Managing Evaluators
- Scripting Tool
- Using System Reports
- Perform Analytics
- System Notifications
- *Evaluator Training (if purchased)*

## Customer Responsibilities

- System Configuration
  - Complete configuration tasks (including but not limited to the list above)
  - Review and verify configuration, complete signoff

## Completion Criteria

This activity will be considered complete when:

- The system has been installed
- Customer completes System Configuration Signoff

## Monitoring

### PowerSchool Responsibilities

- Schedule and conduct a launch review meeting
- Provide launch documentation

### Customer Responsibilities

- Attend all Product Overviews and Training
- Complete end-user testing within the software
- Log and Follow Up on Support Cases as needed
- Report critical issues to your implementation team
- Update the Project Plan to indicate client tasks completed

## Completion Criteria

This activity will be considered complete when:

- Customer has attended Product Overviews
- Customer has attended any additional training included in their package

- Customer has completed the launch review meeting

## 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