PowerSchool Handbook

Federal Survey Form Report

Version 2.2
August 2019

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Table of Contents

Elementary and Secondary Schools 4
Run the Federal Survey Form Report on the Survey Date 4
Elementary Example 5
Secondary Example 5
K-8 Example 6
Format the Federal Survey Form Report in Excel 8
Header/Footer and Page Set Up of the Report 8
Required: Select All Borders for Gridlines in Report 11
Run Labels for the Federal Survey Forms 13
Create Labels Using Mail Merge in Word 13
Track Survey Collection Using the Report and Labels 15
Add Sort & Filter Function 15
Finalize the Report to Submit 17
Count and Alphabetize Forms 17
Required Report Columns List 17
Use Sort & Filter Function to Sort Data by Student Last Name 18
Record Your Information on the Bottom of the Report 19
Submit Completed Report and Forms 19
Sample View of Federal Survey Form Report 20
Additional Report to Submit: Special Education – SAI Services 21

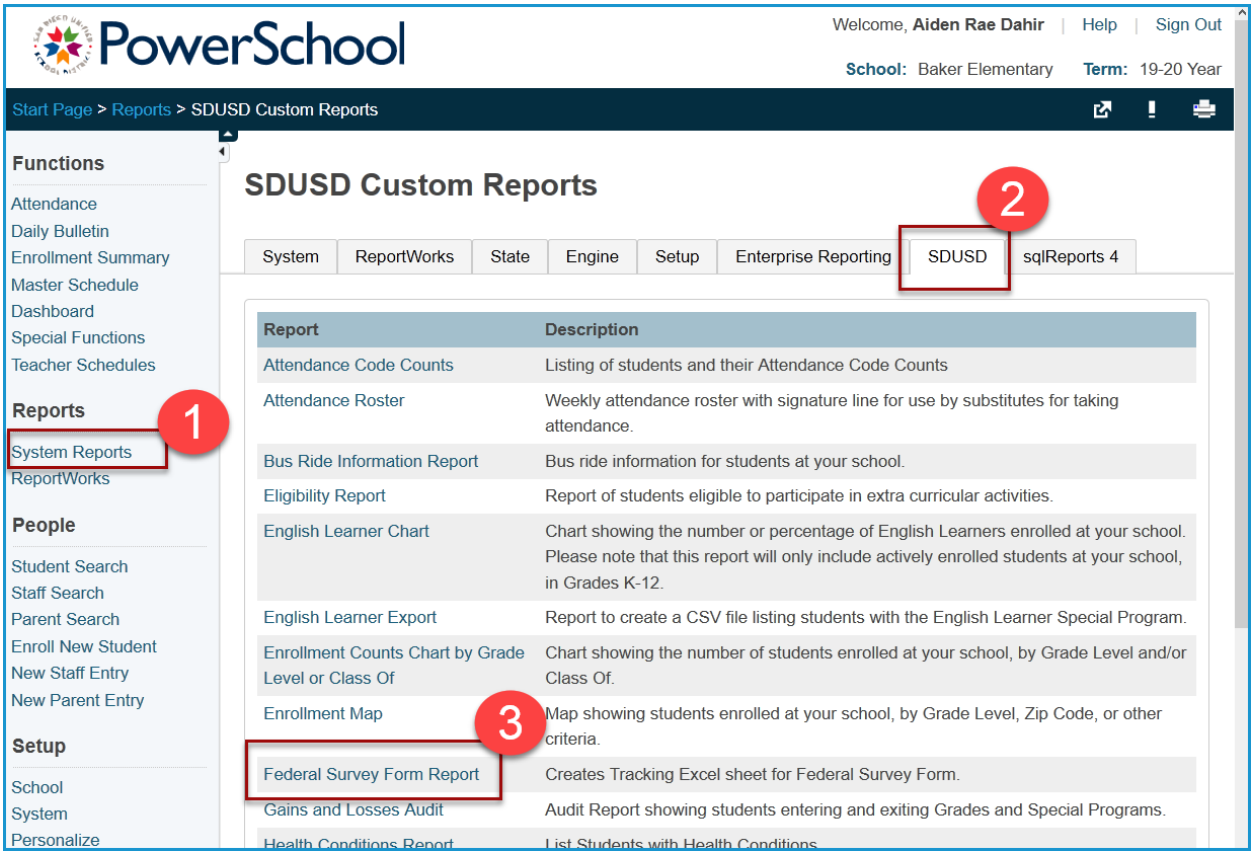
Elementary and Secondary Schools

Elementary and Secondary schools will follow the steps in this handbook to:

- ✓ **Run** the Federal Survey Form Report in PowerSchool
- ✓ **Creat**e a spreadsheet using Microsoft Excel
- ✓ **Use** mail merge to create labels
- ✓ **Collect** and track Federal Survey Forms
- ✓ **Submit** forms and report to Impact Aid Office

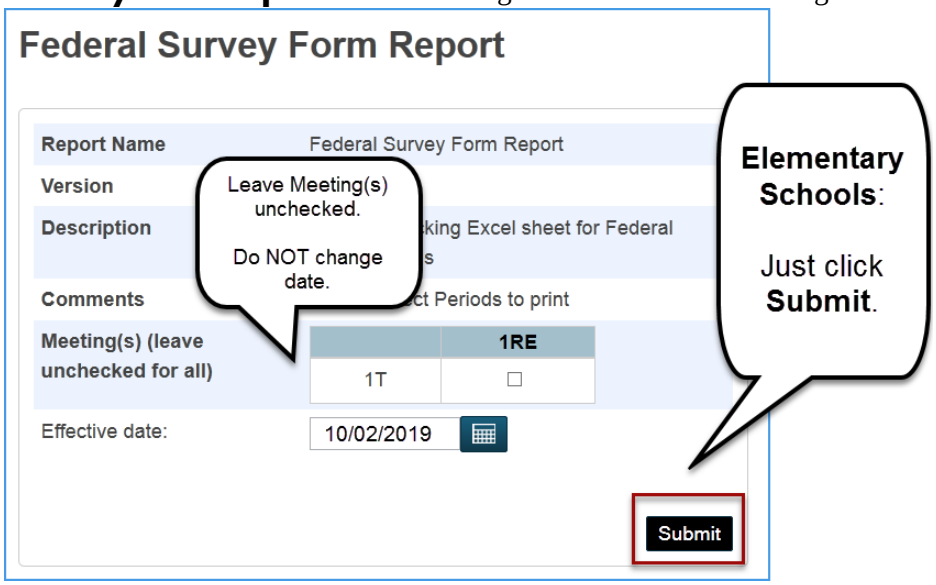
Run the Federal Survey Form Report on the Survey Date

1. From the Start Page in PowerSchool, click **System Reports.**
2. Click **SDUSD** tab.
3. Select **Federal Survey Form Report.**

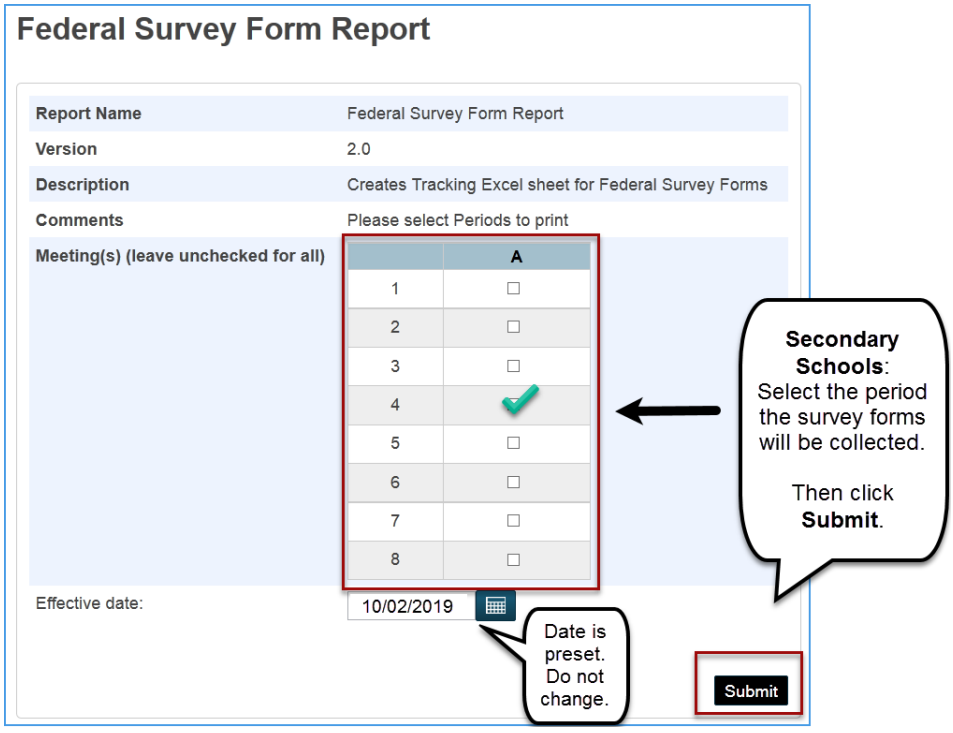


4. Follow instructions below for your site level:

Elementary Example Leave meetings unchecked. Do not change date. Click **Submit**.

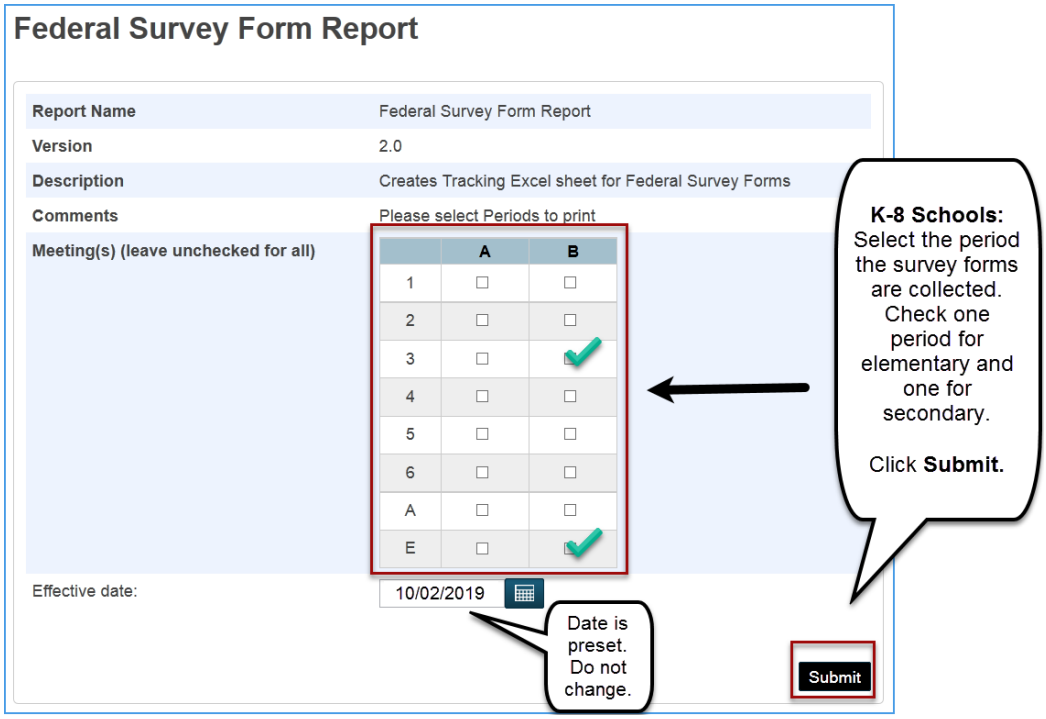


Secondary Example Select the **period** you would like the report to run and then click **Submit**. For example, your site may decide to collect the survey forms during Period 4. In this case, you should select **4.**



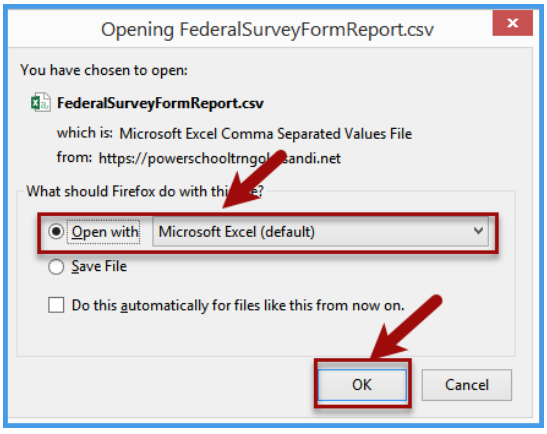
(Your meeting options may look different.)

K-8 Example: Most K-8 sites will need to select a period for their secondary students (such as Advisory), and one for their elementary students. Select the **period(s)** for which you would like the report to run and then click **Submit**.



(Your meeting options may look different.)

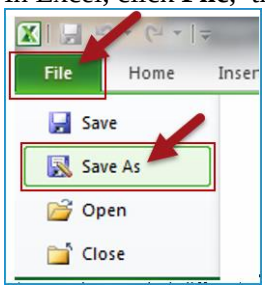
5. After clicking **Submit** in Step 4, a dialog window opens. Verify or Click **Open with**.



(Your options may look different)

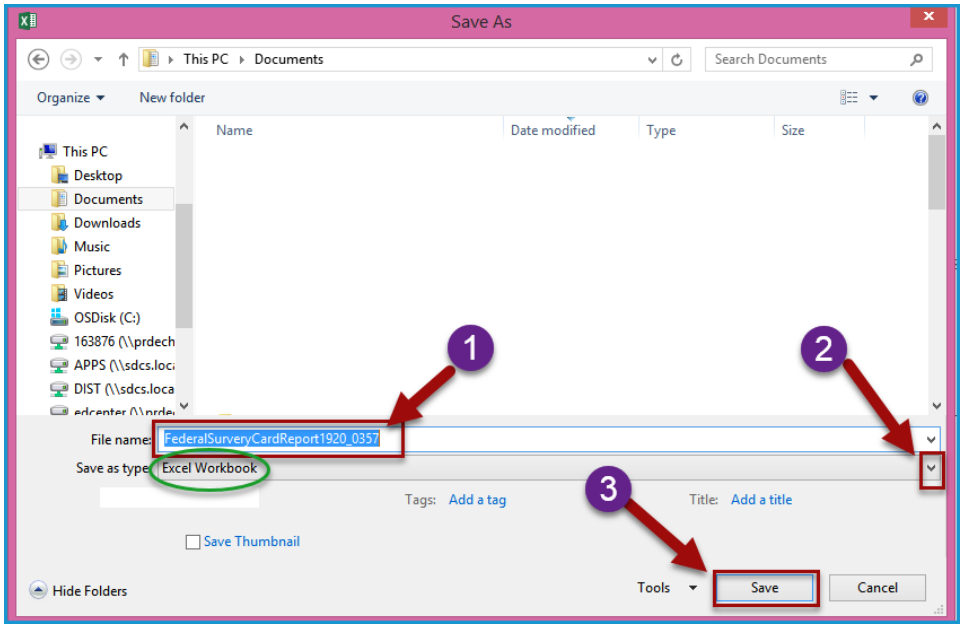
6. Click **OK**. The Excel file opens.

7. In Excel, click **File**, then click **Save As.**



(Your options may look different)

8. Browse to the location in which you want to store the file. Some users like to first create a new folder, titled **Federal Survey Forms** for example, to store this report and other related files. Name the file to **FedSurveyFormReport1920_cost center**.xls where "cost center" is your 2019-2020 cost center. For example, if your cost center is 0357, your file should be titled, "**FedSurveyFormReport1920_0357".** Select **Excel Workbook** in the 'Save as type' field.



9. Click **Save**.
10. If this prompt appears, click **Open**.

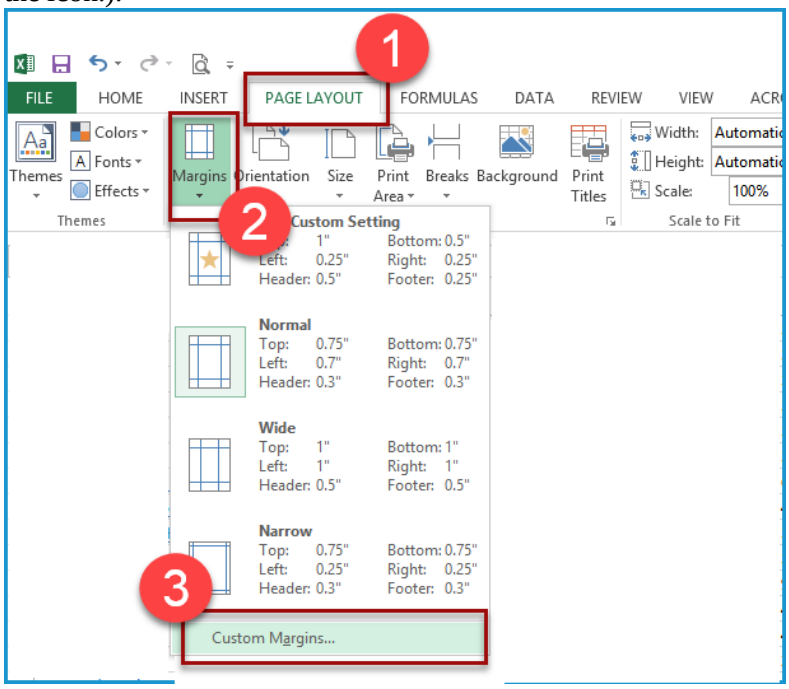
11. If any cells contain " ######", you must expand the column width to see the data.

Format the Federal Survey Form Report in Excel

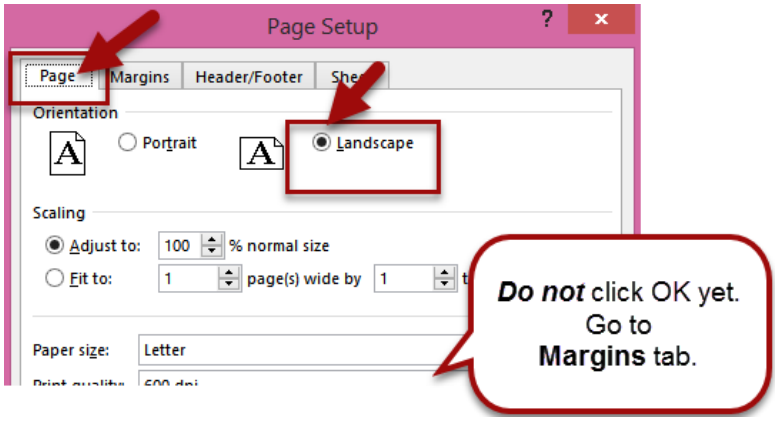
Header/Footer and Page Set Up of the Report

1. **Open** your saved Excel report for the Federal Survey Form.

2. Click the **Page Layout** tab**.** Click **Margins.** Select **Custom Margins** (the words at the bottom, ***not*** the icon.).

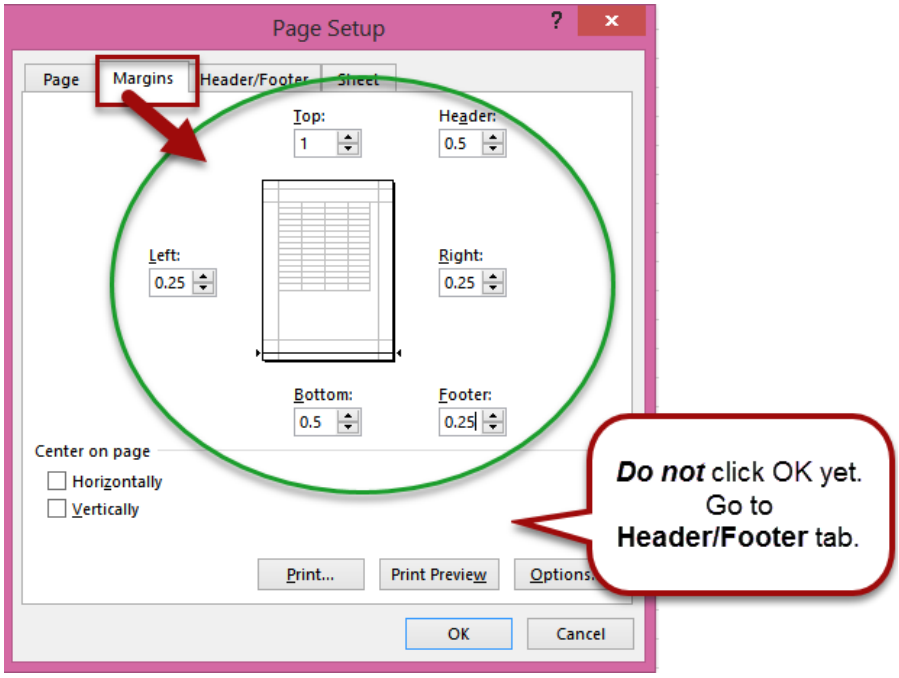


   a. On the **Page** tab, select **Landscape.**

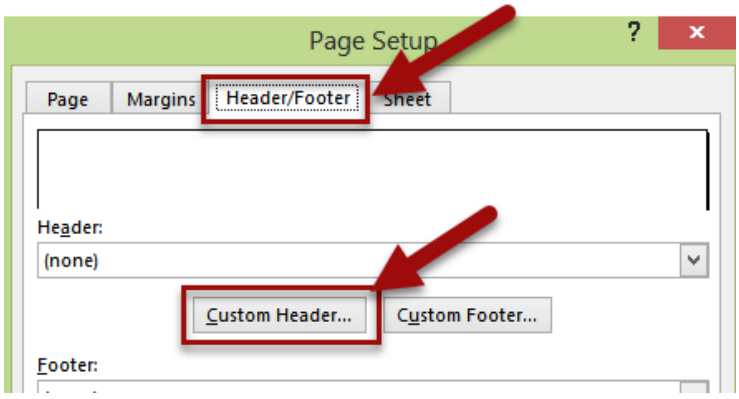


b. On the **Margins** tab, adjust to sizes below:

- ✓ **Left** and **Right** to **.25**
- ✓ **Top** to **1**
- ✓ **Bottom** to **.5**
- ✓ **Header** to **.5**
- ✓ **Footer** to .**25**

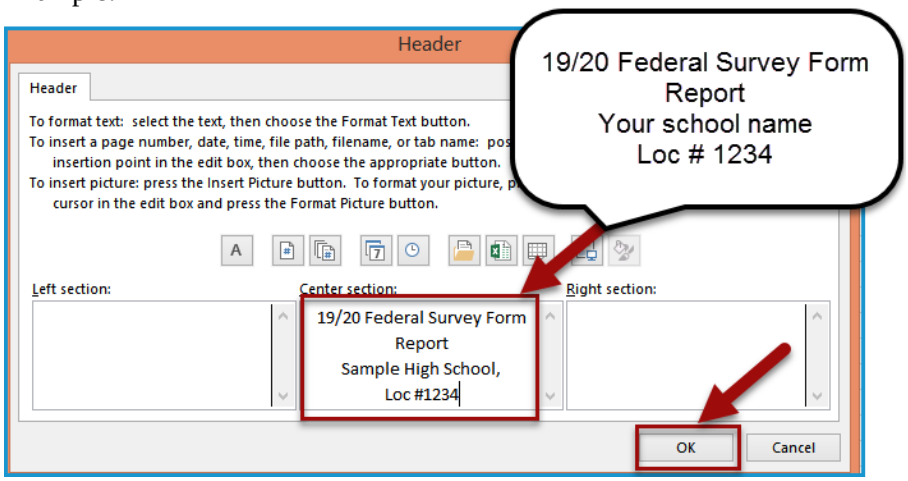


c. On the **Header/Footer** tab, click **Custom Header.**



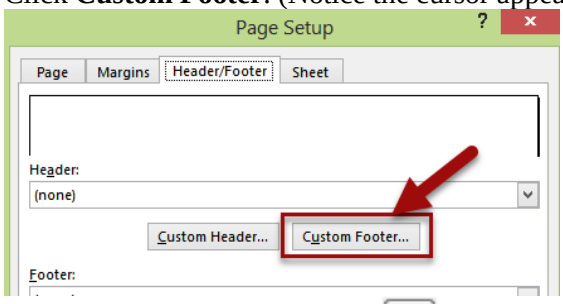
d. In the **Center section**, enter the following: **19/20 Federal Survey Form Report**. Press the **Enter** key on your keyboard, and then enter your School name and your location #.

Example:



e. Click **OK**. (This window closes and returns to the **Header/Footer** tab on the **Page Setup** dialog box.

f. Click **Custom Footer**. (Notice the cursor appears in the **Left section**)



g. Click the **Insert File Path icon** .
(**&[Path]&[File]** appears.
In the printed document, this will show the file path and name.)

h. Click in the **Right section**.

i. Click the **Insert Page Number** icon , type the word **of**, press the space bar, and then click the **Insert # of Pages** icon . (This will put page numbers (e.g., **1 of 16**) on your report.)

j. Click **OK**.

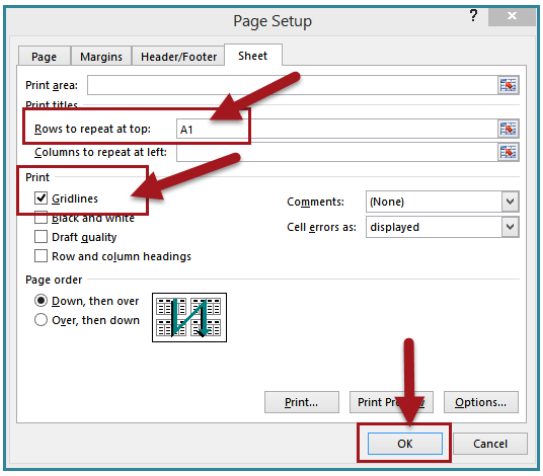
k. Click the **Sheet** tab:

l. In **Rows to Repeat at Top**, enter **A1**. (This will put your column headers on all pages.)

m. Check **Gridlines** to include gridlines in the spreadsheet.

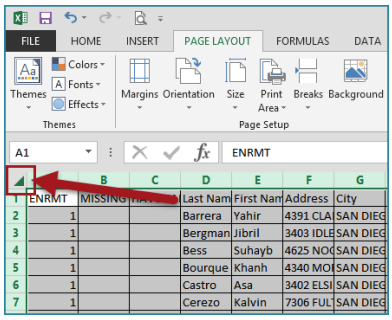
n. Click **OK**.

Your window should look like this:

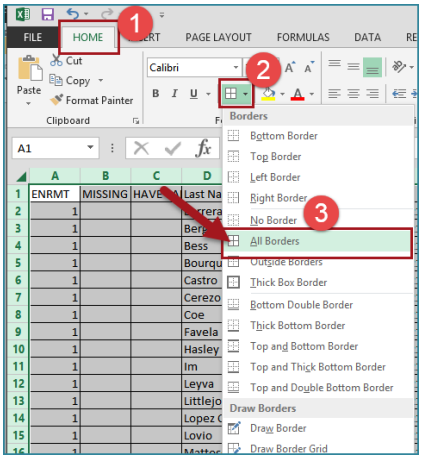


Required: Select All Borders for Gridlines in Report

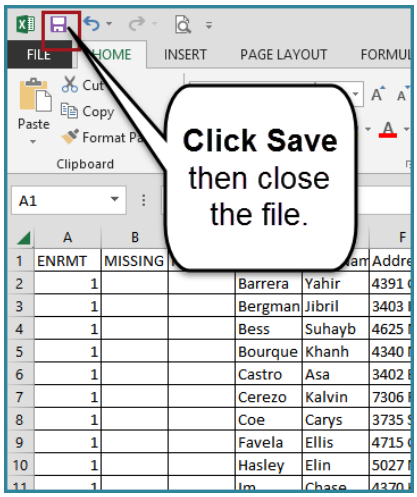
1. Click the **triangle** to the left of the A cell. The entire Excel report will turn gray.



2. Then, in the **Home** tab, click the **Borders** icon and select **All Borders** from the menu. This will put gridlines throughout your report including the **Missing Form** column.



3. Click **Save** and close the file until you need to use it when students turn in their forms.



Reminder! The Federal Survey Form Report is created to automatically tally your survey form counts as you enter them in the ***Have Form*** and ***Missing Form*** cells. You will see the sum at the bottom of each column.

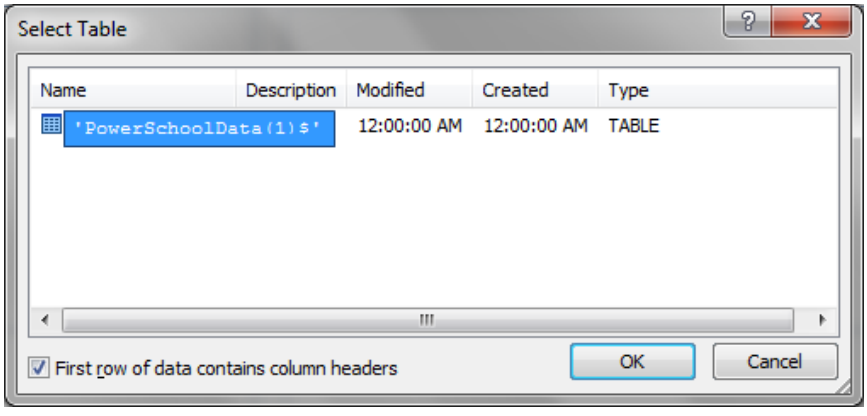
Run Labels for the Federal Survey Forms

Labels must be attached to the survey forms before they are sent in to the Impact Aid Office. You must run the labels from your **PowerSchool Federal Survey Report**. Run the labels when you prepare for the survey, and set them aside. You may wait until forms are completed to attach the labels since you may not know what language form each child needs. **Please affix the label in the blank upper right area of the survey forms without covering any of the print.**

These labels assist the central office to identify the students since some handwriting is unreadable and we are dealing with a high volume of forms. Also, the name written on the forms is not always the registered name, which makes it hard to find in the student information system.

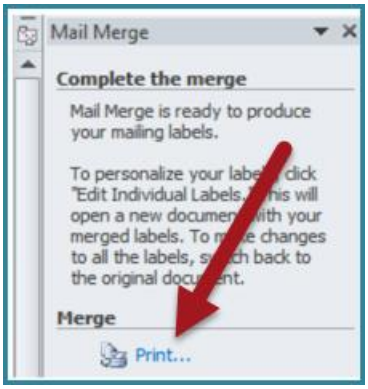
Create Labels Using Mail Merge in Word

1. Launch **Microsoft Word**.
2. Click the **Mailings** tab
3. Click **Start Mail Merge** > Select **Step by Step Mail Merge Wizard …**
   The **Mail Merge** task pane opens on the right side of the document:
4. Under **Select document type**, click the **Labels** radio button
5. Under **Step 1 of 6** at the bottom of the page, click **Next: Starting document.**
6. Under **Change document layout,** click **Label options** and select the types of labels you are going to print. (Typically **Avery 5167**, but the type of labels you have could be different.)
7. Click **OK**.
8. Under **Step 2 of 6**, click **Next: Select recipients.**
9. Under **Select recipients,** confirm that the **Use an existing list radio button is selected**, and under **Use an existing list,** click **Browse....**
10. When the browse window opens, navigate to your desktop**,** and **select** the Excel Spreadsheet that you saved earlier, **"FedSurveyFormsXX_cost center of your site.xls"**
11. Click **OK**
    The following (or similar) window opens:



(If more than one row is listed in the Select Table window, select the top option)

12. Confirm that **First row of data contains column headers** is checked.
13. Click **OK**.
    The **Mail Merge Recipients** window opens:
14. Click **OK**.
15. You should now see the label sheet formatted with the words **Next Record** appearing in each label.
16. At the bottom right, under Step 3 of 6, click **Next: A**rrange your labels.
17. Under **Arrange your labels**, click **More items …** .
    The **Insert Merge Field** window opens. The fields listed match the fields found in your Excel spreadsheet.
18. **Insert** the **desired fields** from the list.
    You ***must*** include **Last Name**, **First Name**, and **Student Ident.**
    (You could also add Teacher Name or Classroom Number if you will be distributing forms by teacher or classroom.)
19. Close the **Insert Merge Field** window.
20. Edit the label information:
    You can add spaces (or commas and spaces) between **each field,** or hit the **Enter** key on your keyboard to add a new line after any field.
21. S**elect All** and **change the font size** to have the text better fit your label. (Most users choose 8 or 9 point).
22. **Click** the **Update all labels** button**.**
    (This changes all the labels to match the first one you formatted.)
23. Under Step 4 of 6, click **Next: Preview your labels.**
24. Under Step 5 of 6, click **Next: Complete the merge.**
25. **IMPORTANT:** To print ***all*** labels, click **Print…** in the **Mail Merge** box on the right side of the screen.



(If you were to choose **Print** from the **File** menu, **only** the first page of labels would print.)

Track Survey Collection Using the Report and Labels

As forms are turned in by your teachers:

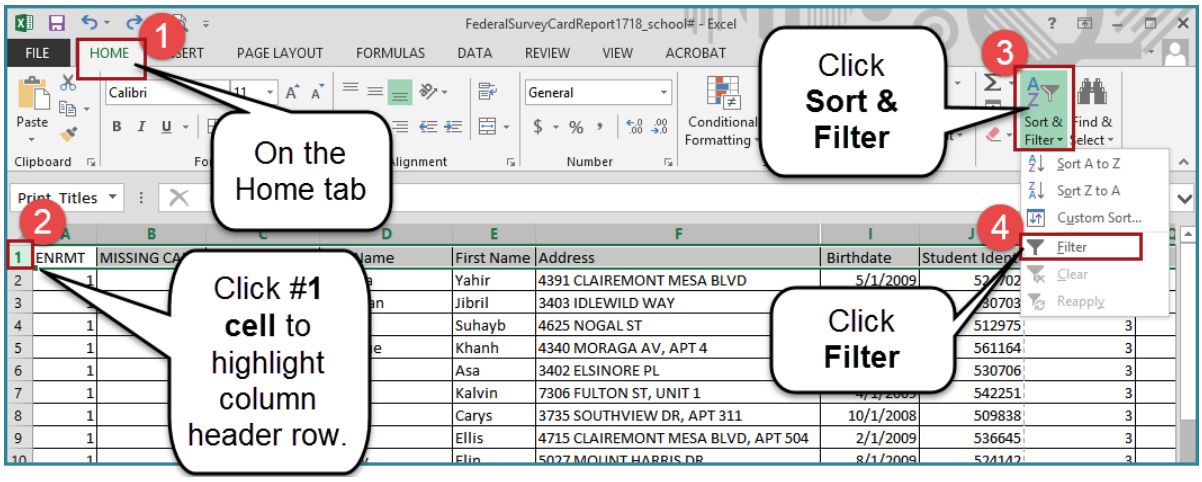
1. Affix the corresponding label in the blank upper right area of the survey form without covering any of the print.
2. Open your Excel Federal Survey Form Report and Type the numeral **1** in the **HAVE FORM** column for each student with a completed form. If you have duplicate forms for a student, staple these together and count as one.
3. If the student does not have a form, enter the numeral **1** in the **MISSING FORM** column.

Note any student name changes on the form and put the form in alphabetical order according to your list. For example, if student name "David Smith" is on your report and the label, however "David Jones" is now written on the form, due to name change, please highlight "David Smith" on your report and write "David Jones" next to the name on the report. On the form, write "David Jones" above the name on label. You can file it by Smith for comparison purposes to balance your forms to your list.

Add Sort & Filter Function

While recording your form collection, you may sort the list by teacher, classroom number, or student ID number. It is suggested to keep your list in classroom or teacher order until the end of your survey form collection.

1. To apply the Sort & Filter:



To use the filter, click on the dropdown arrow in the column title you wish to work with. Make the selections you want to display by selecting or deselecting. Click OK.

Reminder! The Federal Survey Form Report is created to automatically tally your survey form counts as you enter them in the **Have Form** and **Missing Form** cells. You will see the sum at the bottom of each column. Please confirm the totals match your form collection count. If not, check to be sure the formulas are still calculating. If you have any problems, please call for assistance before submitting the final report to the Impact Aid Office.

Finalize the Report to Submit

Count and Alphabetize Forms

At the end of the collection,

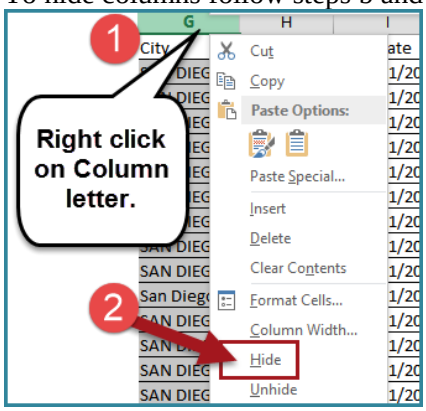
- ✓ You must alphabetize all of your forms in complete alphabetical order.
- ✓ Count all of your forms. Your total on your list should match the number of forms collected. If it doesn't, go through the forms, comparing them to the list until you are balanced to your list.

Required Report Columns List

1. Your final report ***must ONLY*** include the following columns:
   - **ENRMT**
   - **MISSING FORM**
   - **HAVE FORM**
   - **Last Name**
   - **First Name**
   - **Address**
   - **Birthdate**
   - **STUDENT Ident**
   - **Grade Number**

   a. Hide or Remove the columns, **City**, **Zip**, **Teacher**, **Room #**, **Period**, **Course Code** and **Course Description** columns when actually submitting the report. (This will reduce the number of pages of your report)

   To hide columns follow steps b and c below:



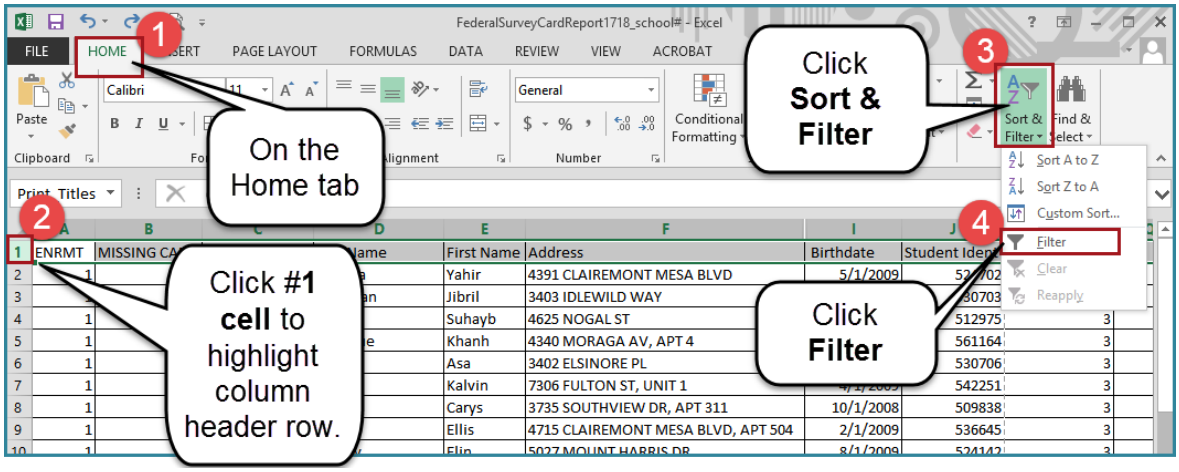
   b. Click **View** tab and select **Page Break Preview**.

   c. Move the blue lines to include the 9 required columns (see list in #1)

Use Sort & Filter Function to Sort Data by Student Last Name

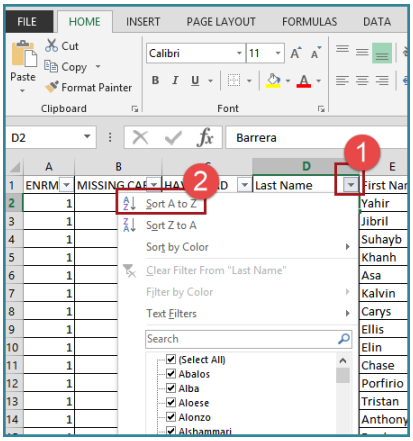
IMPORTANT! Your final report must be sorted by student last name, for the entire school before submitting to the Impact Aid Office!

If you have not added the filter function, follow steps 1-4 in the screenshot below:



When the filters are applied:

1. Click on the filter arrow in the Last Name column.
2. Click on Sort A to Z. Then click **OK.**

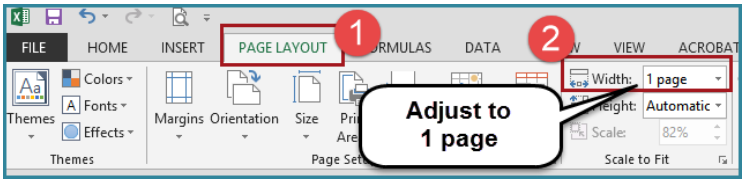


*Look over the report data to be sure it is in the appropriate order.

Record Your Information on the Bottom of the Report

1. Before printing, **type** your name, phone number and email address at the bottom of the report.
2. **Print** one copy of the list in Landscape format on 8 1/2 x 11 paper.

If your report is too wide, please reduce the size of your report from **Page Layout** tab:



3. On the last page of your printed report**, Circle** the total number in the **HAVE FORM** column.
4. **Sign** and **date** the printed report.

Example:

1		1	Urias	Harry	4512 CLAIREMONT DR, 1/2	1/1/2011	587332	1
1		1	Van	Leela	3320 VIA BARTOLO	10/1/2007	533297	5
1		1	Vicencio	Quinton	3233 Karok Ave	8/1/2010	446199	1
1		1	Viramontes	Ginger	6423 Mount Ackerman DR	12/1/2009	548687	2
1		1	Vorise	Vladimir	5649 Market Street, Street	2/1/2008	604475	4
1		1	Weddle	Joceline	3735 SOUTHVIEW DR, APT 311	4/1/2011	570297	1
1				Elliott	8036 LINDA VISTA RD, APT 2H	5/1/2007	604466	4
1				Aliyah	3530 IDLEWILD WAY	11/1/2011	564915	0
1				Emiliano	3437 MOUNT ARIANE DR	5/1/2009	537783	3
1				Harun	3888 GENESEE AVE, APT 113	4/1/2009	528250	2
1				James	4569 CLAIREMONT DR	4/1/2009	415065	3
1			1 Yan	Italia	4146 RAPPAHANNO		566071	1
1			1 Zamorano	Nestor	4079 HUERFANO A		528240	3
1			1 Zamorano	Starr	4441 MORAGA AV		414147	3
1			1 Zipp	Nevin	3511 IDLEWILD WA		528263	3
159	1	158						
Staff member responsible for survey:			Suzie Seals		*Suzie Seals* October XX, 20XX			
Email:			sseals@sandi.net					
Phone#:			(858)291-1234					

Circle the total in the **Have Form** column.

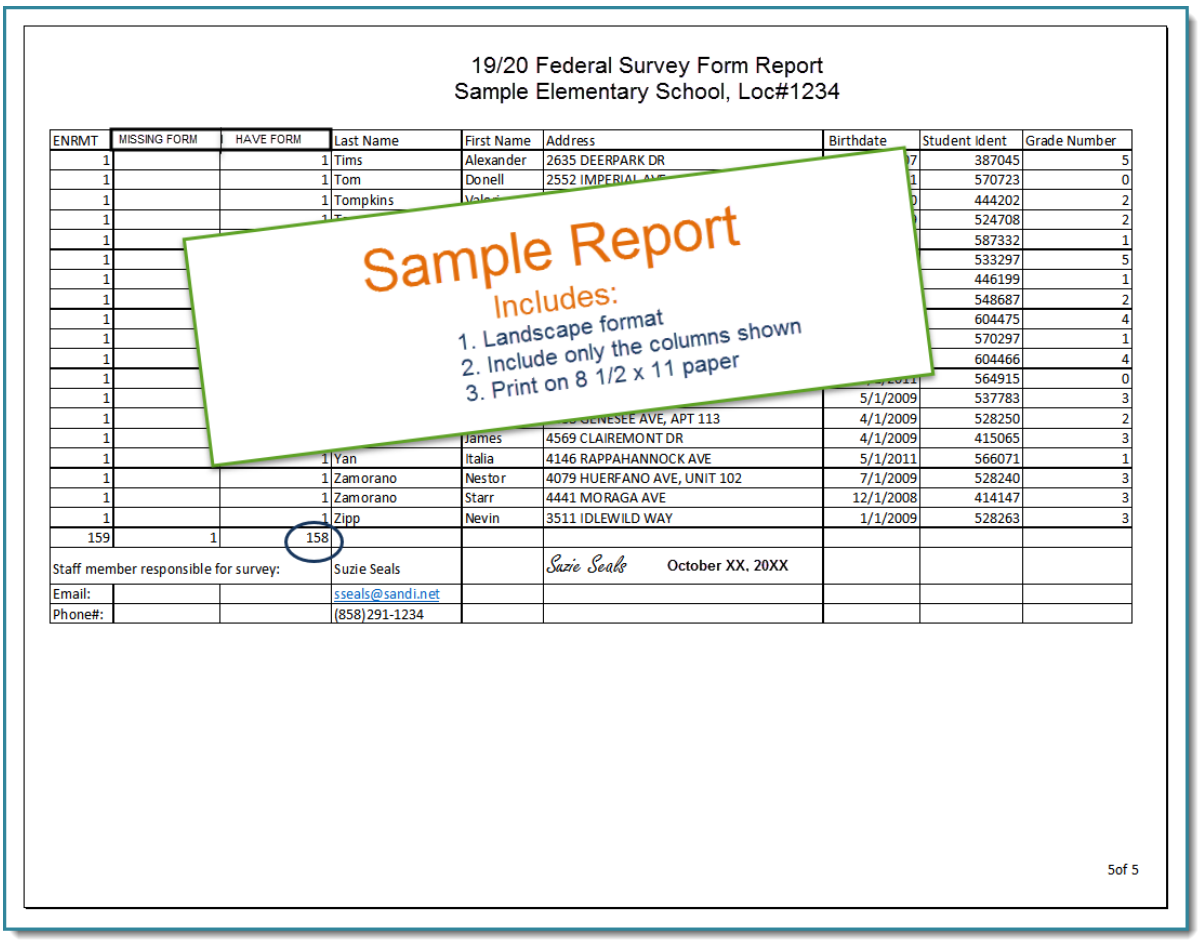
Sign and Date report.

Submit Completed Report and Forms

Submit the original and keep a copy with the site employee information, signature and circled total on file at the site until the end of the school year. Also keep the electronic file until the end of the school year.

- ✓ When submitting the report and the actual survey forms, bring them to the **Impact Aid Office, Room 3244 at the Education Center.**
- ✓ Please contact the Impact Aide Office with any Federal Survey Form questions.
- ✓ If you encounter PowerSchool-related problems, please contact your school's PowerSchool Power User or the IT Help Desk at 619-209-HELP (4357).

Sample View of Federal Survey Form Report



19/20 Federal Survey Form Report
Sample Elementary School, Loc#1234

ENRMT	MISSING FORM	HAVE FORM	Last Name	First Name	Address	Birthdate	Student Ident	Grade Number
1		1	Tims	Alexander	2635 DEERPARK DR	7	387045	5
1		1	Tom	Donell	2552 IMPERIAL AVE	1	570723	0
1		1	Tompkins	Valeri		0	444202	2
1		1	T			1	524708	2
1							587332	1
1							533297	5
1							446199	1
1							548687	2
1							604475	4
1							570297	1
1							604466	4
1							564915	0
1						5/1/2009	537783	3
1					SENESEE AVE, APT 113	4/1/2009	528250	2
1				James	4569 CLAIREMONT DR	4/1/2009	415065	3
1		1	Yan	Italia	4146 RAPPAHANNOCK AVE	5/1/2011	566071	1
1		1	Zamorano	Nestor	4079 HUERFANO AVE, UNIT 102	7/1/2009	528240	3
1		1	Zamorano	Starr	4441 MORAGA AVE	12/1/2008	414147	3
1		1	Zipp	Nevin	3511 IDLEWILD WAY	1/1/2009	528263	3
159	1	158						
Staff member responsible for survey:			Suzie Seals		*Suzie Seals* October XX, 20XX			
Email:			sseals@sandi.net					
Phone#:			(858)291-1234					

Sample Report
Includes:
1. Landscape format
2. Include only the columns shown
3. Print on 8 1/2 x 11 paper

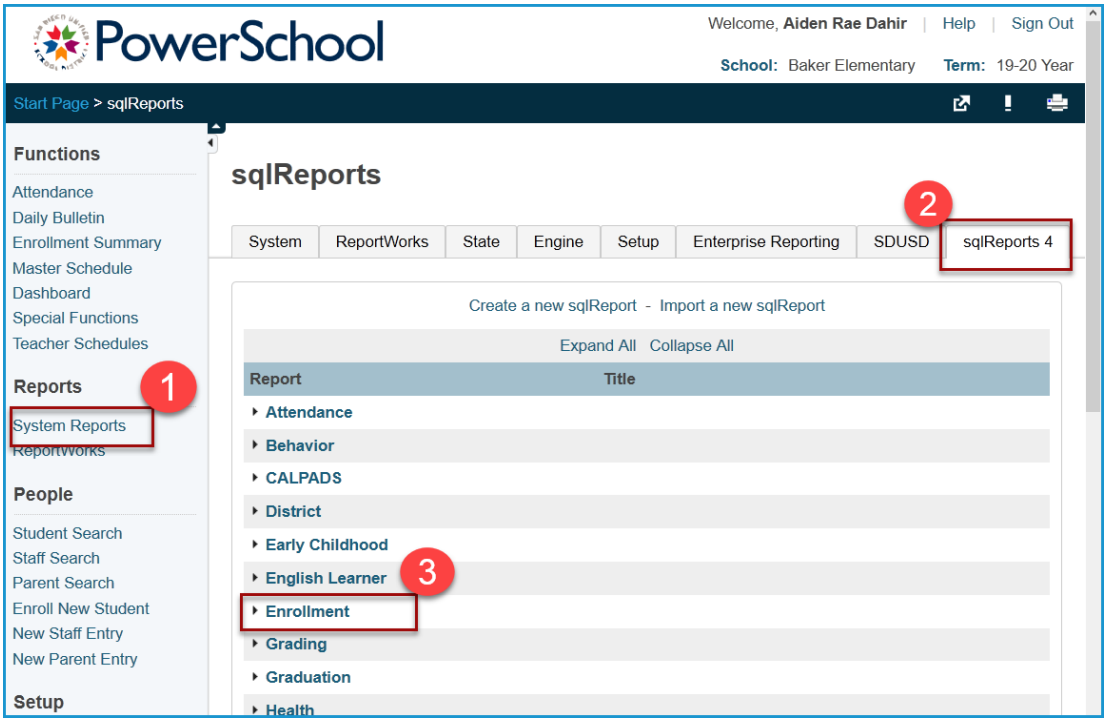
5of 5

*Screenshot shows final page of report. Print and submit **ALL** pages of your school's report.

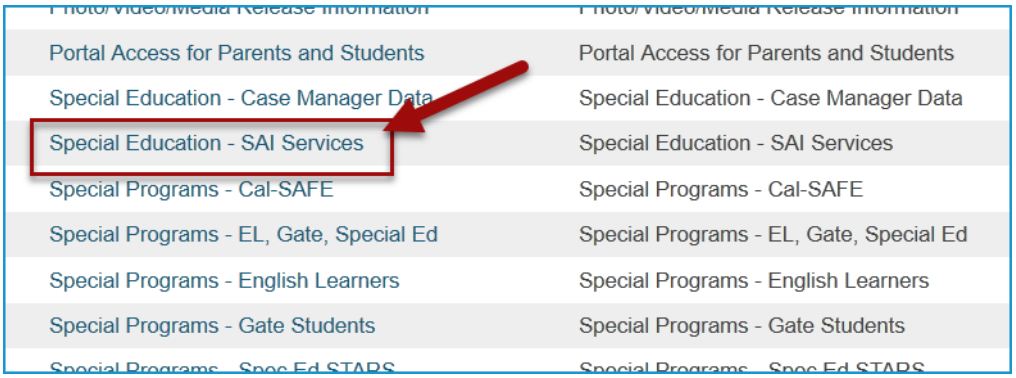
Additional Report to Submit: Special Education – SAI Services

This report needs to be included in your submitted documents to the Impact Aid Office. Run the **Special Education-SAI Services** report in PowerSchool. You will print the report and attach your Principal's Certifications.

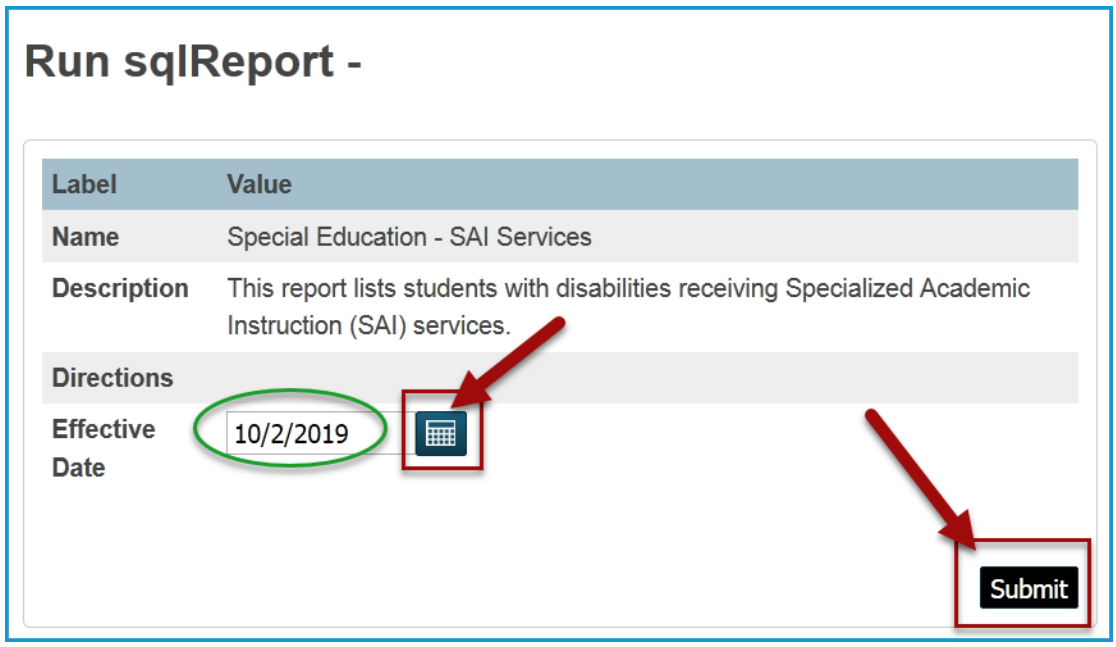
1. From the Start Page in PowerSchool, click **System Reports**.
2. Click **sqlReports 4** tab.
3. Expand **Enrollment** reports.



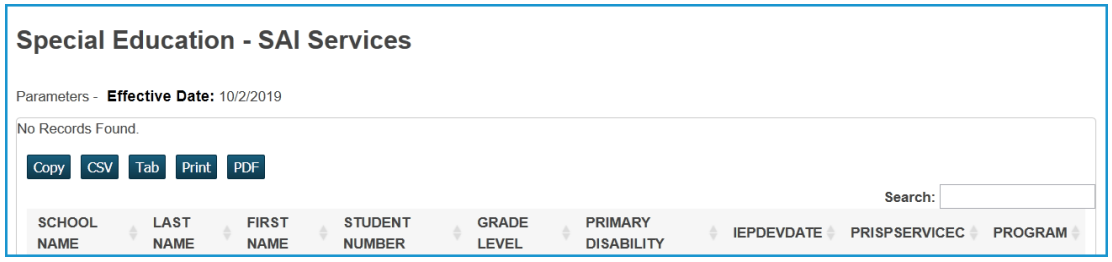
4. Scroll down the list and click **Special Education-SAI Services**.

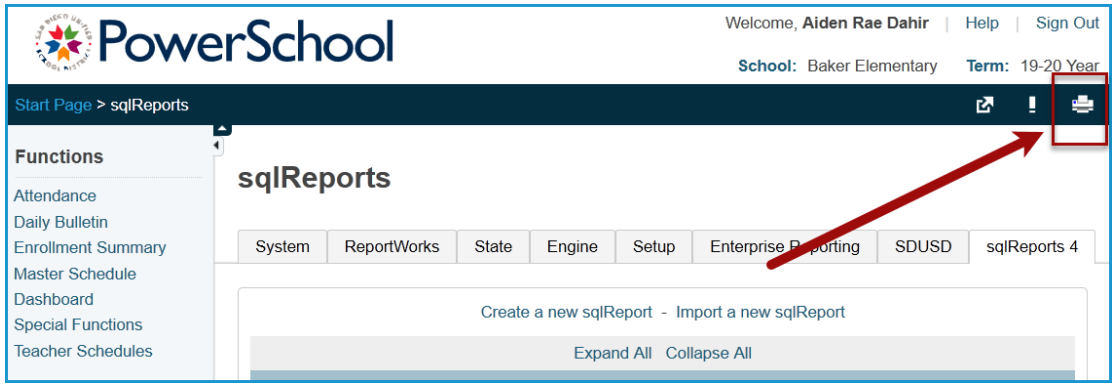


5. Set the Effective Date to **10/2/2019**. Then click **Submit.**



6. The report appears. **Print the report** by clicking the **Printer Icon**.





7. **Submit** this **report** with your **Principal's Certifications** attached, along with the **Federal Survey Form documents**, to the Impact Aid Office.