



219 North Main Street, Suite 402  
Barre, VT 05641 (p) 802-479-1030 | (f) 802-479-1835

## **AOE Shared School District Data Management Project**

### **Frequently Asked Questions**

#### **1. How is this project funded?**

- a. **Implementation:** Implementation of this project is funded by an appropriation from 2015 made in support of the UCOA. This will cover the cost of database design and setup, training, and unlimited data conversion support from the vendor (data conversion support is covered through July 1, 2019).
- b. **Ongoing costs:** The yearly ongoing costs of the SSDDMS will be covered by an existing appropriation through at least FY2021 and will not be run through adopting SU/SD's local budgets. The agency will be working closely with the legislature to provide ongoing funding after FY2021 for the SSDDMS from the state.

#### **2. When does the project start?**

- a. The SSDDMS project officially kicked-off on April 1, 2018, following contract signing. Those SU/SDs that join in time to go-live by July 1, 2019 will receive free unlimited data conversions support during the implementation process.

#### **3. How long will it take to implement and when can I start using the system?**

- a. Implementation for an SU is scheduled to take 6-12 months, depending on the round.
- b. While there are a number of options for an SU's implementation start date, we expect everyone who wishes to join the project to be up and running on the new system by July 1, 2019. The earliest an SU can go-live on the new system will be October, 2018. This go-live date reflects full system functionality. Go-live dates are noted by round later in the FAQ.

#### **4. Who is the software vendor? What is the product name?**

- a. The vendor is PowerSchool.
- b. The product/service licensed to fulfill the requirements of the SSDDMS is [eFinancePLUS](#).

#### **5. How much will it cost my SU/SD to implement and use the system?**

- a. **Implementation:** The majority of implementation costs will be covered by the State. Potential local costs that would not be covered by the State include the SU/SD's staff time associated with the following:
  - i. Extract data from the legacy FMS.
  - ii. Convert legacy data to the new UCOA and input data into PowerSchool's data conversion templates.
  - iii. Attend trainings (virtual and in-person) on eFinancePLUS.
  - iv. Test LEA eFinancePLUS tables.
- b. **Ongoing costs:** There will be no licensing and maintenance costs charged to adopting SU/SDs through at least FY2021, as these costs will be covered by the State. The agency will be working closely with the legislature to provide ongoing funding from the State for the SSDDMS subsequent to FY2021.

## 6. What hardware will I need?

- a. This is a vendor-hosted solution, so no local hardware will be needed with the exception of any printers you may need. Software will be accessed through a web browser. You will need to make sure your web browser is updated.

## 7. What will the new system do?

- a. **eFinancePLUS functional modules and system software:** eFinancePLUS is a fully web-based solution comprised of the following functional modules and system software that can be accessed using Mac or Windows based laptops, personal computers, and mobile devices:
  - i. Human Resources
    1. **Payroll:** Payroll management in eFinancePLUS is fast, efficient, accurate, and versatile enough to handle the complexities of your district's payroll without error. Complete with step-by-step guidance, process payroll without the hassle with a unique payroll wizard to guide personnel through the process of setting up a pay run, timecard entry, calculating and running reports, and more.
    2. **Attendance:** Remove the hassle of requests and attendance monitoring. Leave requests are automatically routed to the appropriate individuals for approval and posted to time sheets without any extra steps. Track leave balances and accrue leave with flexibility according to leave types based on years of service, hours worked, or over a certain period of time.
    3. **Personnel:** All current and historical information needed for an employee is accessible as designated by district-defined security preferences for easy reference regarding absences, training, certifications, emergency information, previous positions, salaries, and much more just by glancing at an employee's record. Plus, it's simple to set up new employees in the system with easy step-by-step guidance from an online wizard.
    4. **Workflow:** Manage the routing of employee leave requests, new hires, terminations, applicant recommendations, and more right from within eFinancePLUS.

- 5. Position Control:** Track robust job and personnel information through the years, including specific position details. Accurately account for and easily identify budgeted positions and provide tight controls over positions that are being filled or transferred within the district.
- 6. Professional Development:** Increase your service levels to employees and reduce administrative workload by allowing employees to enroll in courses and monitor their own progress. Manage course catalog requests, employee and external participant registration, wait-listing, and more.
- 7. Employee Time Sheets:** Take the hassle out of clocking in and out by providing employees an intuitive and simple interface for recording their daily time. Time entered by employees gets routed to the approver, and once approved the time sheet automatically feeds into the payroll process.
- 8. Benefits Management:** Track all-inclusive employee benefit information including dependents and COBRA.
- 9. Recruitment:** Manage the process, from position request through employee on-boarding, with ease and efficiency. Automate key tasks, reduce data entry, and maximize the reach of your job postings to increase the efficiency of your school district's hiring process. Plus, ensure compliance with district and budget controls.
- 10. Salary Projections:** Calculate an increase or decrease to an existing employee's or group of employees' salary or schedule as a percentage, dollar amount, or both. Then, easily carry over a schedule into the payroll process to start the next cycle. Identify your bottom line costs with ease and re-run salary calculations as many times as needed.
- 11. Employee Access Center (EAC):** Through this convenient web portal, provide employees with anytime, anywhere access to their payroll and personnel information. Define what information can be viewed—demographics, benefit statements, benefit enrollment, attendance history, deduction/benefit history, payroll checks, certifications, and skills. Allow employees to update their personal information and route those changes to appropriate personnel for review and approval. Those with security access can impersonate a user with an audit trail. Teachers can seamlessly link to EAC, right from Teacher Access Center, without requiring additional security details.
  - a. **Demographics:** *Display address and contact information for employees to easily review and change. Security prevents items, such as social security number and birthdates, from being adjusted, but dependent and tax information can be changed as well as any demographic information when an employee's lifestyle changes. You can also create hyperlinks to websites such as the IRS to download forms that need to be filled out and signed for tax purposes. Benefit Statements provide your employees with an up-to-date picture of their total benefits and salary information, including employer contributions. The information is clearly displayed on a pie chart, along with a detail listing that can be printed.*
  - b. **Benefit Enrollment:** *Share an online list of available benefits with your employees for their annual selection. They can also link to the provider's websites for more details. Employees can choose their benefits, and payroll staff would need to just review and update.*
  - c. **Attendance History:** *Through an easy to read graphical calendar display, employees can quickly see their leave time. Each leave*

*day is color coded based on type. A tabular chart shows remaining leave balances. Employees can also request leave time through a simple web form, which is automatically routed to the appropriate individuals for approval.*

- d. **Deduction/Benefit History:** Summary and detail information for an employee's year-to-date deductions and benefits are listed. Employees can easily view monthly, quarterly, fiscal, calendar, and inception-to-date totals, and they can review and print all past paycheck details.
- e. **W2 Forms:** Automatically make .pdfs of employee W2s available for viewing and printing, helping to relieve district staff from the burden. Past years' W2 forms also remain available to the employee for as long as they have worked for your district.
- f. **Certifications and Skills:** Employees can review and track their certifications, degrees, and job skills, including any renewal or expiration dates.

12. **Employee App:** The Employee app empowers your employees to be mobile and productive, and decentralize HR data entry process all at the same time. It helps to:

- a. Improve the employee experience
- b. Reduce time-consuming HR phone calls or emails
- c. Increase efficiency and accuracy for both employees and districts
- d. Keep employees and district staff in sync with on-the-go collaboration

ii. Reporting

- 1. **Cognos Reporting:** eFinancePLUS also integrates with Cognos reporting tools, which provide end users with extremely intuitive query and report writing capabilities. It also provides technology staff with the ability to develop more extensive and complex reports when needed. Easily and quickly create any query or report through point and click processes. All of the eFinancePLUS database fields are presented to the end user in easy-to-understand language. An exhaustive list of selection capabilities, filtering options, sorting features, and calculation types allow users to create any simple list or complex report. Reports can be presented as tabular lists or quickly converted to graphical displays such as pie charts, bar graphs, or trend lines, or all of the above. They can also be output in a variety of formats including .pdf, .html, Excel, Word, or ASCII files. Reports can be deployed over the web and scheduled to run on specific dates and times to give staff quick access to the information they need, when they need it.
- 2. **Regulatory Reporting:** Easily generate state and federal regulatory reports. With the eFinancePLUS regulatory reporting feature, we include both the federal and state specific reports for your organization. On an on-going basis, PowerSchool's reporting team will update accordingly as reporting requirements change.
- 3. **Standard Reports:** This application provides you with hundreds of out-of-the-box reports. Simply select which report you need and our print wizard allows you to specify the reporting criteria, sort options, and whether or not you want to view the report online, send to a printer, or save as a .pdf to send as an email attachment. An online status bar shows progress of the report as it is executing

iii. Financials

1. **General Ledger:** Improve the efficiency of your business operations with default templates for journal entries, easy reversals, ability to work in multiple periods, simple displays and drill downs, and the ability to attach and view documents associated with transactions.
2. **Project Accounting:** See the full picture of how much money your district has received and spent by tracking grants and projects across multiple fiscal years. Never miss a transaction with automated linking to the general ledger chart of accounts and track detailed information on projects and grants.
3. **Purchasing:** Quickly enter requisitions with full access to available vendors, commodities, budget balances, and more. Purchasing staff can view all approvals and attachments and, in one step, convert requisitions into purchase orders and encumber the funds. Plus, every step along the way, approvers can be notified by email to review requisitions and personnel can receive email notifications on the progress of their purchases.
4. **Budgeting:** Pull year-to-date actuals, estimate costs to the end of the year, and produce multiple versions of what next year's budget may look like. As soon as you get the version you are satisfied with, put it in the hands of your administrators to make adjustments. Easily tie personnel details to budgeted line items and create other shortcuts like these to allow you to efficiently manage your budgeting process from start to finish.
5. **Accounts Payable:** Enter a batch or post directly online, you choose how you wish to pay your outstanding invoices. Pay existing encumbrances quickly or if it is a new invoice, put the details in the system and charge to the appropriate accounts. Keep copies of the invoice right alongside the details for easy reference.
6. **Workflow:** Manage the routing of requisitions, purchase orders, change orders, accounts payable, budget adjustments, and budget transfers through the approval process, notifying the requester as progress is made.
7. **Warehouse Inventory:** Fully integrated with the general ledger and purchasing systems, view up-to-date information to requisition from stock, process approvals, generate pick pack lists, and reorder quantities right within your inventory list.
8. **Personnel Budgeting:** Easily and automatically feed positions and employees' salary and benefit information into a budgeting environment and use this information to create unlimited versions of next year's budget. Human Resources module needed to make this work best.
9. **Miscellaneous Billing:** Easily generate a one-time invoice or set up recurring invoices based off of details including the type of service, drop in the standard fees, and track potential penalties or interest. Plus, have the ability to produce bills and take payments over the counter or through the mail with optional central receipting.
10. **Fixed Assets:** Create new or automatically generate asset records over a defined dollar amount or from capital accounts. Track depreciation costs to post to the general ledger and automatically batch files for review, all while adhering to reporting requirements.
11. **Fixed Assets Communicator:** An automated interface identifies the differences between your system and your appraisal company and allows administrators to update the details in your fixed asset files for consistency. It's that easy.

12. **Vendor Access Center:** Efficiently manages the vendor registration process, reduces routine vendor requests, and distributes vendor forms. Through this secure web-based portal, vendors can view orders, submit invoices, and check the status of payments. Includes: Vendor 1099 Forms, Invoices, Purchase Orders, Payment Status
13. **Vendor Bidding:** Easily create consolidated bid lists from requisitions. After the vendor responds, plug in the costs and the system automatically calculates the lowest bidder. Once the bid is awarded, the system will create a purchase order to provide to the awarded vendor.
14. **Purchasing Card (PCard) Interface:** The PCard Interface enables you to efficiently administer credit card use for employees. Easily assign, specify roles, and track transactions without the burden on staff.
15. **Vendor PunchOut:** Streamline the purchasing process by enabling your organization to shop directly on a vendor's website using negotiated pricing and catalogs. When a user checks out from the website, PunchOut seamlessly imports their shopping cart as an eFinancePLUS requisition to be automatically pre-encumbered and follow the district's standard workflow approval routing.
  - iv. Central Management of the UCOA & other standardized data
  - v. More streamlined reporting to VT AOE
  - vi. And more!

**8. How many user licenses will my SU have access to? How do employees outside the business office access the system?**

- a. SUs will have access to an unlimited number of licenses.
- b. Employees can access the system from a URL, whether inside or outside of the business office.

**9. What will AOE's role be during the ongoing operation of the solution?**

- a. AOE's primary role will be managing the Uniform Chart of Accounts and other standardized data, such as teacher staff categories.
- b. AOE will evaluate any UCOA change requests with the VASBO Handbook II Committee.
- c. AOE will assist in the creation of standardized reporting to be used at the local, state, and federal levels.
- d. AOE will not serve as a technical helpdesk. All technical issues should be reported through the identified SU lead, then to the vendor technical helpdesk.
- e. AOE will continue to serve as the primary contact for all UCOA questions.

**10. Who will manage the permissions for various modules?**

- a. The SU will determine who within their organization is responsible for granting certain permissions.

**11. Will AOE have access to SU and district staff personally identifiable information (e.g. SSNs, Birthdates, HIPAA, FERPA etc.)?**

- a. No. AOE will not have access to personally identifiable staffing information. Any personally identifiable information accessible to AOE will be masked, or viewed only in aggregate.

**12. Will our local information be subject to state public records requests?**

- a. The data that AOE extracts or builds Statewide reports on, in the Data warehouse section of the eFinancePLUS is subject to State public records requests.
- b. The data in each SU's individual instance of eFinancePLUS is also subject to public records requests submitted to the individual SU/SD, as it is currently.

**13. What kind of customer service/system support can we expect after implementation and how will standards of service be ensured?**

- a. Customer service and vendor-managed system support were some of the key criteria evaluated during the vendor selection process. The selected vendor offers stellar customer service, and will maintain an expected level of quality, as outlined in our mutually agreed upon service level agreement.
- b. Response times will vary based on call load and time of the school year. The vendor's targeted response times during Support Business Hours are listed below, however initial phone response times average **two minutes** or less during off-peak season, and **less than 10 minutes** during the peak-season. Customers preferring to interact via email will typically receive a response within **four business hours** during non-peak season and within **12 business hours** during the peak back-to-school season.

Support Type	Response Time
Telephone Support	Less than 10 minutes
Customer Portal Submitted Case	Less than 1 business day

**14. How much system/technical training is available and when?**

- a. Training (Virtual Classroom) will be available beginning day one of contract execution. If you would like to access the Virtual Classroom, please contact the AOE project team.
- b. Various types of training will be available to SU and district staff throughout the implementation and/or post-go live:
  - i. **On-Site Instructor Led Training**– An instructor will travel to your implementation group's identified location and provide hands-on training in a classroom environment. They will lead you through the software functionality.
  - ii. **Virtual One-on-One Classroom** – During this instructor led training, an instructor will provide specific instruction on given topics with a focus on both the software topics and the specific needs of your organization.

- iii. **Virtual Classroom** – An instructor will provide training on specific topics via distance learning to multiple users from multiple organizations. The instruction will be tailored to be applicable across all participating organizations.
- iv. **LearningPLUS/Online Self-Paced Training** – During this online session, the participant will drive an instruction-based tutorial divided into separate topics by specific processes. This instruction can be taken at any time, allowing the users to self-pace their instruction.
- v. **Implementation Support** – Staffed with experienced software trainers, the team is set up specifically to assist with procedural and setup questions. This team will provide support during and post implementation. After this time, you will be introduced to PowerSchool's Customer Support team to ensure you experience a smooth transition.
- vi. **Office Hours** – A software consultant will lead these remote sessions, intended as a venue to ask questions and help you move forward with your implementation.

**15. What if I recently upgraded my system?**

- a. You can still implement the SSDDMS now, or in the future within the conditions set forth in 2018 Spec. Sess. Acts and Resolves No. 11, Sec. E.500.1.

**16. When will I see a demonstration of the product?**

- a. Onsite demonstrations have now passed, but video recordings are available on the project team website.

**17. What is the deadline for deciding to join a certain implementation round?**

- a. All SUs wishing to opt-in should notify the SSDDMS project management team at [AOE.SSDDMS@vermont.gov](mailto:AOE.SSDDMS@vermont.gov) by the notification deadline specified in the table below with a signed end user agreement (EUA), given the desired go-live date.

Round	Timeframe	Go-live	Notification Date
1a	May 2018 - September 2018	October 1, 2018	April 27, 2018
1b	May 2018 - June 2019	July 1, 2019	April 27, 2018
2	July 2018 - December 2018	January 1, 2019	May 31, 2018 June 8, 2018
3	October 2018 – March 2019	April 1, 2019**ROUND 3 CANCELLED**	August 31, 2018
4	January 2019 – June 2019	July 1, 2019 (due date to comply with UCOA)	November 30, 2018
5	October 2019 – June 2020	July 1, 2020	August 30, 2019
6	October 2020 – June 2021	July 1, 2021	August 30, 2020

## **18. Who will I contact for technical assistance with the SSDDMS?**

- a. You should only contact AOE for questions on the UCOA
- b. For technical assistance with eFinancePLUS that is not related to UCOA content and reporting questions, please see the tiers of support as documented in the Service Level Agreement:

<b>Support Tier</b>	<b>Description</b>
<b>Tier 0 Technical Support</b>	Consists of the eFinancePLUS Administrators at each of the SU/SD. These Administrators have access to the Customer Portal knowledgebase. 80 to 90% of all potential issues may be resolved with the documentation contained on the Customer Portal. Examples include: <ul style="list-style-type: none"><li>• Add/modify/delete users</li><li>• Password reset</li><li>• Escalating issues with Contractor</li><li>• General "How to" questions</li><li>• Submit change requests to AOE and Contractor jointly</li><li>• Route business related questions to appropriate contact at AOE School Finance</li></ul>
<b>Tier 1 Application Support</b>	Performs the initial investigation on all inbound technical support requests. Contractor to diagnose and resolve most issues; however, they will escalate to a Tier 2 Senior Support Specialist if they are unable to provide a resolution. 70 to 80% of submitted cases are typically resolved within Tier 1.
<b>Tier 2 Senior Application Support</b>	Subject matter experts and focus their attention on specific areas of the application, allowing each specialist to obtain a deeper level of knowledge within his/her area of expertise. In the event the Tier 2 Senior Support Specialist is unable to resolve the issue; the issue may be escalated to PowerSchool Product Development organization, depending on the product line and type of issue identified. 10 to 20% of all submitted cases are resolved in Tier 2.
<b>Product Development</b>	Resolves the remainder of all issues. These issues typically are resolved by an eFinancePLUS product release; however, some issues may be resolved with a fix from development directly to the Customer.

### Response Targets

<b>Severity</b>	<b>Target Response Times</b>	<b>Status Frequency</b>
0 – Urgent	30 Minutes	Every 2 hours by email or phone as agreed.



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1 – Critical must have	4 hours	By email or phone as agreed.
2 – Must have not critical	8 hours	As agreed.
3 – Nice to have	2 business days	As agreed.

**19. How will being on the SSDDMS affect my state reporting efforts?**

- a. The following data collections may be either fully or partially automated
  - i. Statbook
  - ii. Teacher Staff
  - iii. Preliminary Budget
  - iv. Actual Budget
  - v. SEER Report - Expenditures
  - vi. Subrecipient Report
  - vii. And more!

**20. How will Statbook data be collected if I am on the SSDDMS? what if I am not on the SSDDMS**

- a. The core Statbook data, revenues and expenditures, will be automatically exported from SU/SDs' databases to the State's data warehouse on a regular basis and refreshed for a final view on August 15<sup>th</sup>. These data will then populate the Statbook worksheets and sent back to SUs/SDs to review and/or provide additional details.
- b. Those that are not on the SSDDMS will need to provide an extract of their revenues and expenditures according to the State's required specifications to be loaded into the SSDDMS by August 15<sup>th</sup>. These data will then populate the Statbook worksheets and sent back to SUs/SDs to review and/or provide additional details.