

# PowerSchool Handbook

## Federal Survey Card Report

Version 1.0  
August 9, 2017



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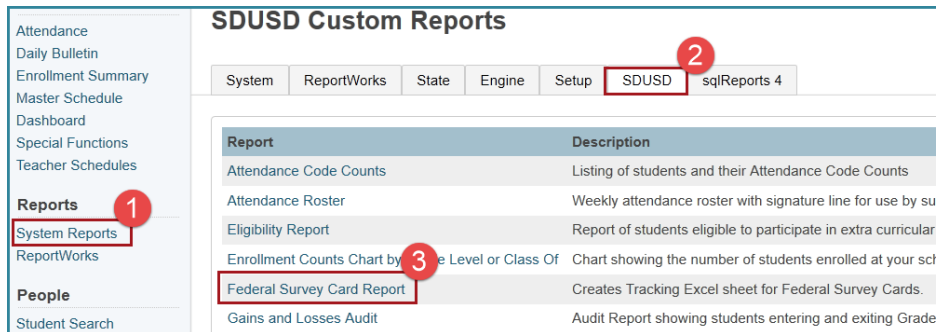
# Federal Survey Card Report: Elementary and Secondary Schools

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

- Run the Federal Survey Card Report in PowerSchool
- Create a spreadsheet using Microsoft Excel
- Use mail merge to create labels
- Collect and track Federal Survey Cards
- Submit cards and report to Impact Aid Office

## Run the Federal Survey card Report on the Survey Date

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

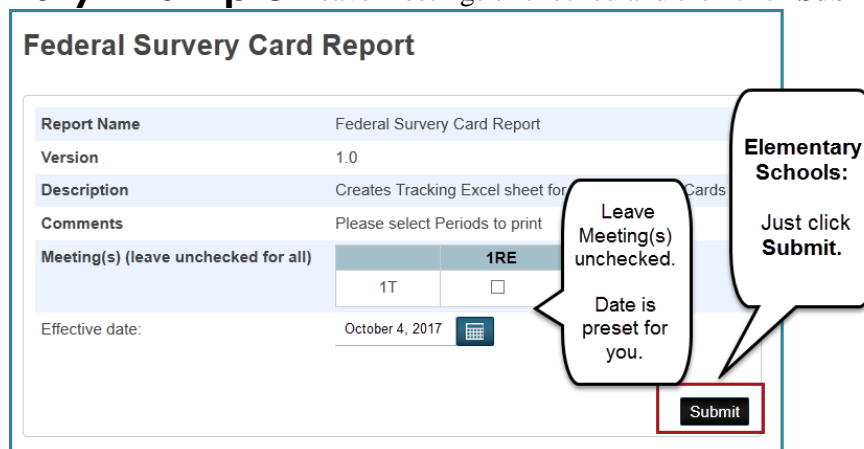


**SDUSD Custom Reports**

Report	Description
Attendance Code Counts	Listing of students and their Attendance Code Counts
Attendance Roster	Weekly attendance roster with signature line for use by sub
Eligibility Report	Report of students eligible to participate in extra curricular a
Enrollment Counts Chart by Grade Level or Class Of	Chart showing the number of students enrolled at your scho
<b>Federal Survey Card Report</b>	Creates Tracking Excel sheet for Federal Survey Cards.
Gains and Losses Audit	Audit Report showing students entering and exiting Grades

4. Follow instructions below for your site level:

## Elementary Example Leave meetings unchecked and then click **Submit**.



**Federal Survey Card Report**

Report Name	Federal Survey Card Report				
Version	1.0				
Description	Creates Tracking Excel sheet for Federal Survey Cards				
Comments	Please select Periods to print				
Meeting(s) (leave unchecked for all)	<table border="1"> <tr> <td>1RE</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>1T</td> <td><input type="checkbox"/></td> </tr> </table>	1RE	<input checked="" type="checkbox"/>	1T	<input type="checkbox"/>
1RE	<input checked="" type="checkbox"/>				
1T	<input type="checkbox"/>				
Effective date:	October 4, 2017				

**Elementary Schools:**  
Just click **Submit**.

Leave Meeting(s) unchecked.

Date is preset for you.

**Submit**

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

### Federal Survey Card Report

Report Name	Federal Survey Card Report
Version	1.0
Description	Creates Tracking Excel sheet for Federal Survey Cards
Comments	Please select Periods to print

Meeting(s) (leave unchecked for all)

	A
1	<input type="checkbox"/>
2	<input type="checkbox"/>
3	<input checked="" type="checkbox"/>
4	<input type="checkbox"/>
5	<input type="checkbox"/>
6	<input type="checkbox"/>
E	<input checked="" type="checkbox"/>

Effective date: October 4, 2017

Date is preset for you.

Submit

**K-8 Schools:**  
Select the period the survey cards are collected. Check one period for elementary and one for secondary. Then click **Submit**.

(Your meeting options may look different.)

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

### Federal Survey Card Report

Report Name	Federal Survey Card Report
Version	1.0
Description	Creates Tracking Excel sheet for Federal Survey Cards
Comments	Please select Periods to print

Meeting(s) (leave unchecked for all)

	A
1	<input type="checkbox"/>
2	<input type="checkbox"/>
3	<input checked="" type="checkbox"/>
4	<input type="checkbox"/>
5	<input type="checkbox"/>
6	<input type="checkbox"/>
E	<input checked="" type="checkbox"/>

Effective date: October 4, 2017

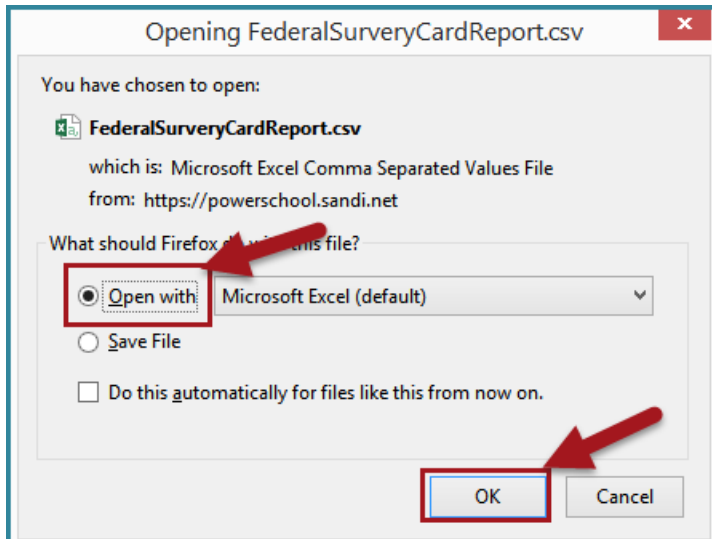
Date is preset for you.

Submit

**K-8 Schools:**  
Select the period the survey cards are collected. Check one period for elementary and one for secondary. Then click **Submit**.

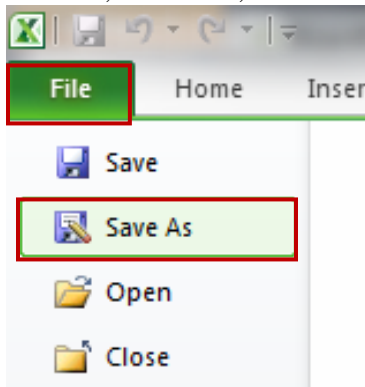
(Your meeting options may look different.)

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



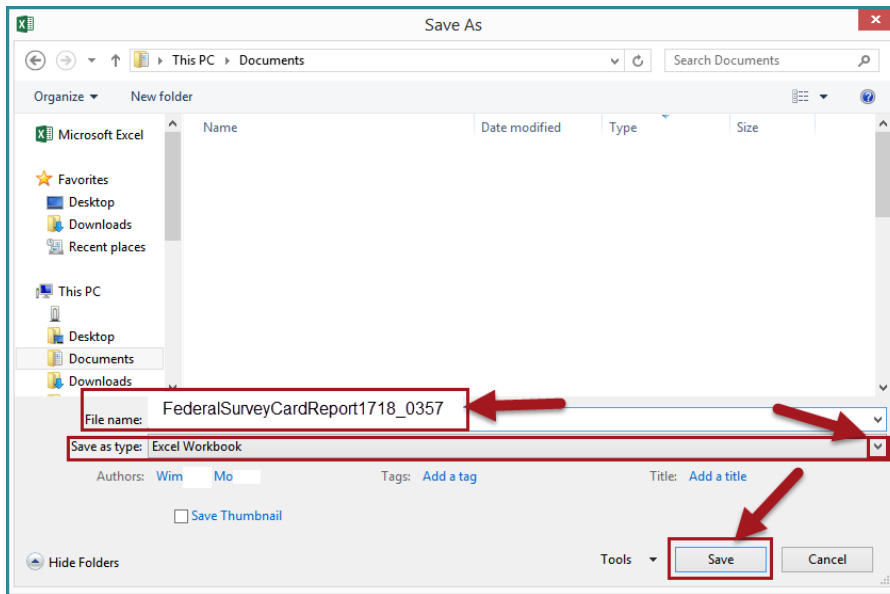
(Your options may look different)

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 Cards** for example, to store this report and other related files. Name the file to **FedSurveyCardReport1718\_cost center.xls** where “cost center” is your 2017-2018 cost center. For example, if your cost center is 0357, your file should be titled, “**FedSurveyCardReport1718\_0357**”. Select **Excel Workbook** in the ‘Save as type’ field.



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

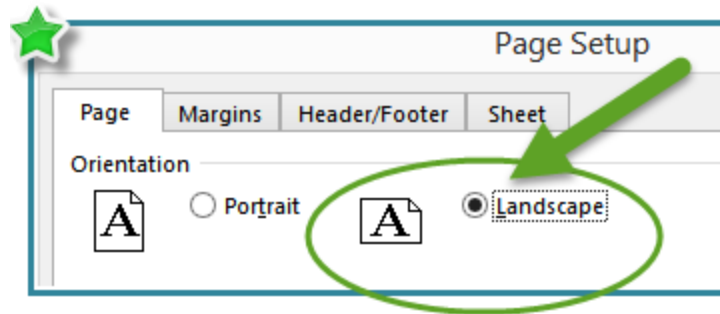


11. If any cells contain “#####”, you must expand the column width to see the data.

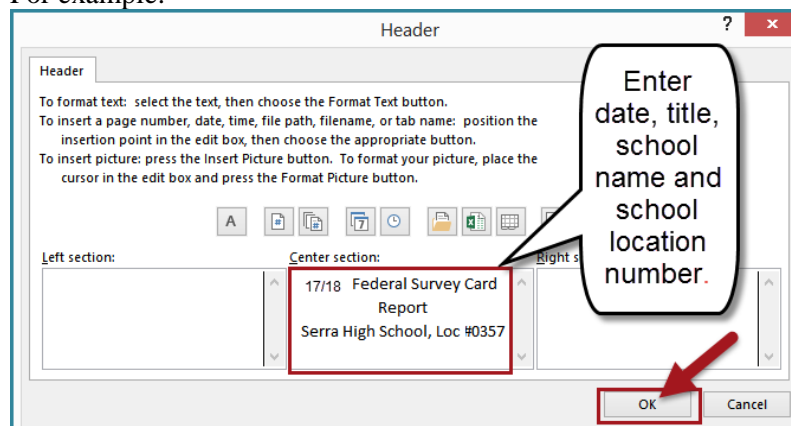
# Format the Federal Survey Card Report in Excel


## Header/Footer and Page Set Up of the Report

1. Open your saved Excel report for the Federal Survey Card.  
Click the **Page Layout** tab > **Margins** > **Custom Margins** (the words at the bottom, *not* the icon.).
  - a. On the **Page** tab, click the **Landscape** radio button.





- b. On the **Margins** tab, set **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: **17/18 Federal Survey Card Report**. Press the **Enter** key on your keyboard, and then enter your School name and your location #.  
For example:



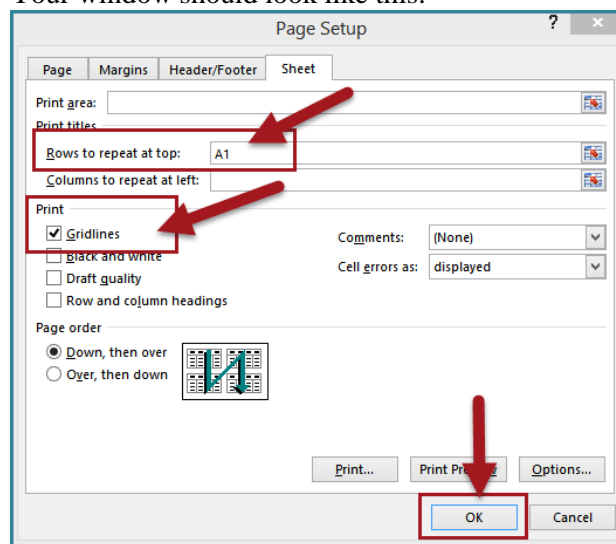
- e. Click **OK**. (This window closes and returns to the **Header/Footer** tab on the **Page Setup** dialog box.)
- f. Click **Custom Footer** (the cursor will be in the **Left** section)
- g. Click the **Insert File Path** icon .  
(**&[Path]&[File]** appears.)



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:
  1. 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.

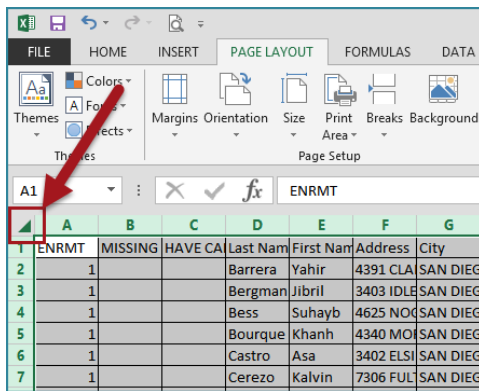
Your window should look like this:



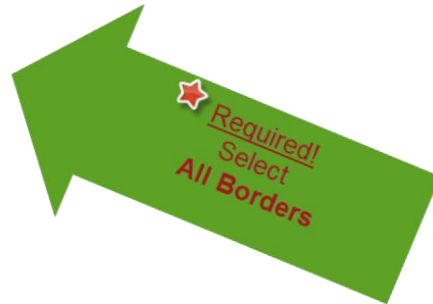
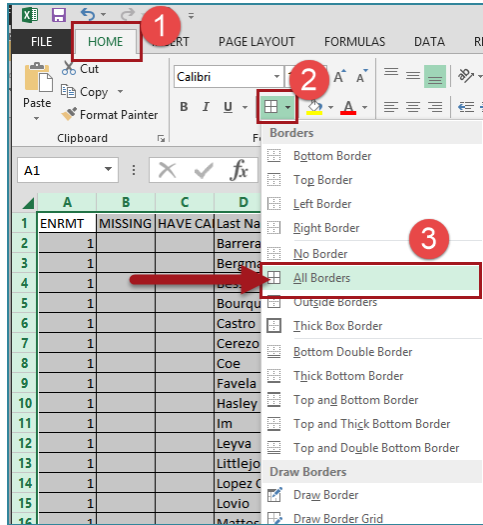
- n. Click **OK**.

## Required: Select All Borders for Gridlines in Report

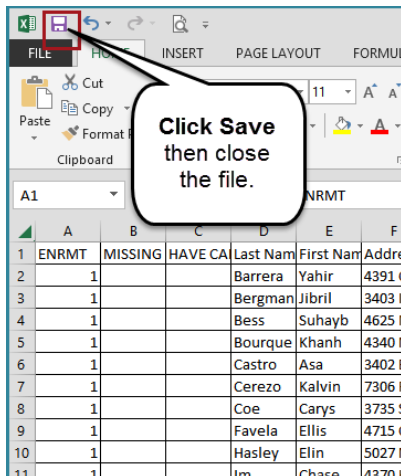
1. Click the **triangle** to the left of the A cell. The entire Excel report will turn gray.



- 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 Card** column.



- Click **Save** and close the file until you need to use it when students turn in cards.



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

## Run Labels for the Federal Survey Cards

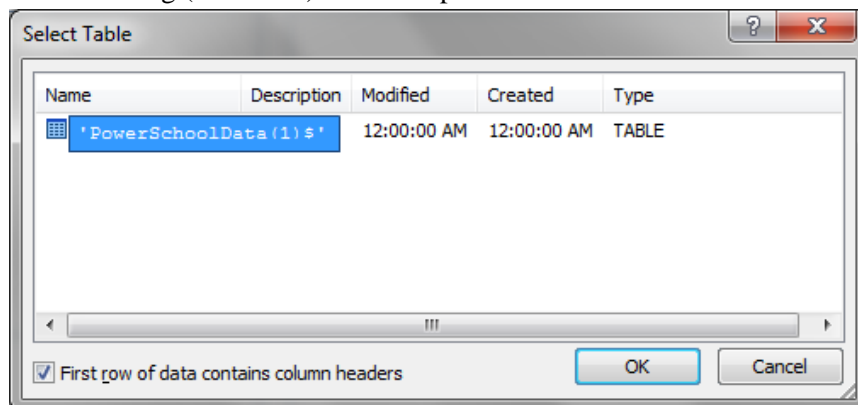
Labels must be attached to the survey cards before they are sent in to the Impact Aid Office. You must run the labels from your **PowerSchool Federal Survey Report**. Run the labels when you prepare for the survey, and set them aside. You may wait until cards are completed to attach the labels since you may not know what language card each child needs. **Please affix the label in the blank\_upper\_right area of the survey cards 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 cards. Also, the name written on the cards is not always the registered name, which makes it hard to find in the student information system.

### Create Labels Using Mail Merge in Word

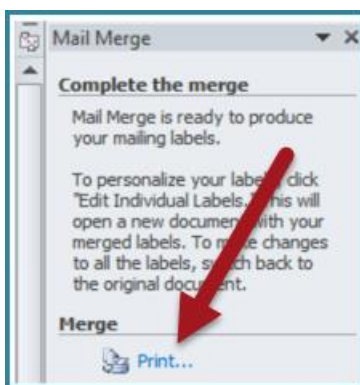
1. Launch **Microsoft Word**.
2. Click the **Mailings** tab
3. Click **Start Mail Merge** > Select **Step by Step Mail Merge Wizard ...**  
The **Mail Merge** task pane opens on the right side of the document:
4. Under **Select document type**, click the **Labels** radio button
5. Under **Step 1 of 6** 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, "**FedSurveyCardsXX\_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: Arrange 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 cards 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. **Select 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 Card Collection Using Report and Labels

As cards are turned in by your teachers:

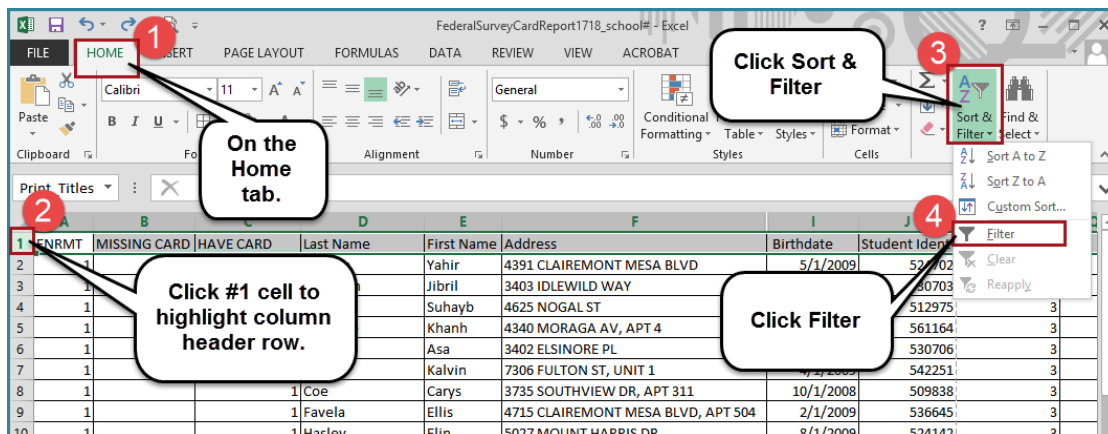
1. Affix the corresponding label in the blank upper right area of the survey card without covering any of the print.
2. Open your Excel Federal Survey card report and Type the numeral **1** in the **HAVE CARD** column for each student with a completed card. If you have duplicate cards for a student,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

Note any student name changes on the card and put card 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 card, due to name change, please highlight “David Smith” on your report and write “David Jones” next to the name on the report. On the card, write “David Jones” above name on label. You can file it by Smith for comparison purposes to balance your cards to your list.

## Add Sort & Filter Function

While recording your card 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 card collection.

To apply the Sort & Filter:



On the Home tab.

Click #1 cell to highlight column header row.

Click Sort & Filter

Click Filter

ENRMT	MISSING CARD	HAVE CARD	Last Name	First Name	Address	Birthdate	Student ID	
1				Yahir	4391 CLAIREMONT MESA BLVD	5/1/2009	527002	
2				Jibril	3403 IDLEWILD WAY		520703	
3				Suhayb	4625 NOGAL ST		512975	
4	1			Khanh	4340 MORAGA AV, APT 4		561164	
5	1			Asa	3402 ELSINORE PL		530706	
6	1			Kalvin	7306 FULTON ST, UNIT 1		542251	
7	1		1	Coe	Carys	3735 SOUTHVIEW DR, APT 311	10/1/2008	509838
8	1		1	Favela	Ellis	4715 CLAIREMONT MESA BLVD, APT 504	2/1/2009	536645
9	1		1	Hasley	Ellis	5027 MOUNT HARRIS DR	8/1/2009	524142

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

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***Reminder!*** The Federal Survey Card Report is created to automatically tally your Survey Card counts as you enter them in the **Missing Card** and **Have Card** columns. You will find the sum at the bottom of each column. Please confirm the totals match your card collection. If not, make 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 Cards

At the end of the collection,

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

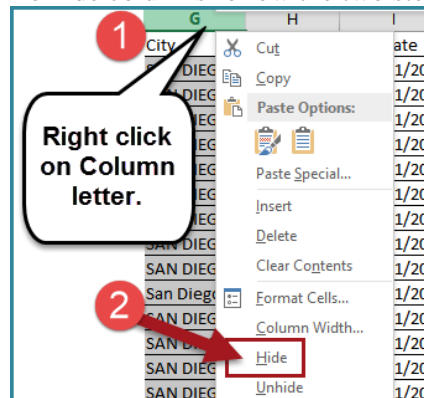
### Required Report Columns List

1. Your final report *must ONLY* include the following columns:

- **ENRMT**
- **MISSING CARD**
- **HAVE CARD**
- **Last Name**
- **First Name**
- **Address**
- **Birthdate**
- **STUDENT Ident**
- **Grade Number**

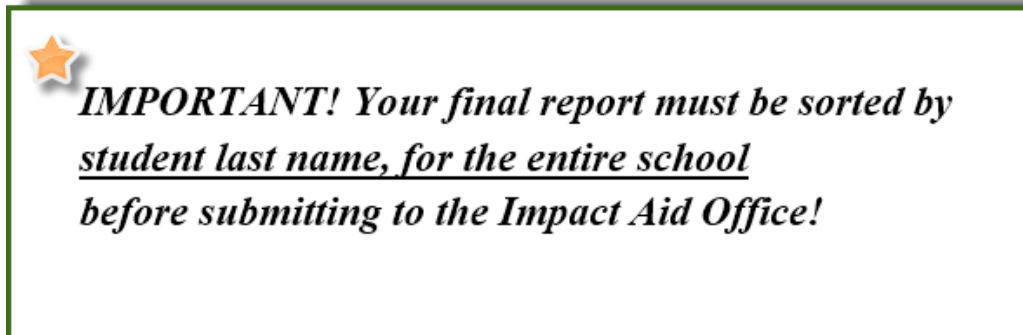
- a. Hide or Remove the columns, **City, Zip, Teacher, Room #, Period, Course Code** and **Course Description** columns when actually submitting the report. (This will reduce the number of pages of your report)

To hide columns follow the two steps below:

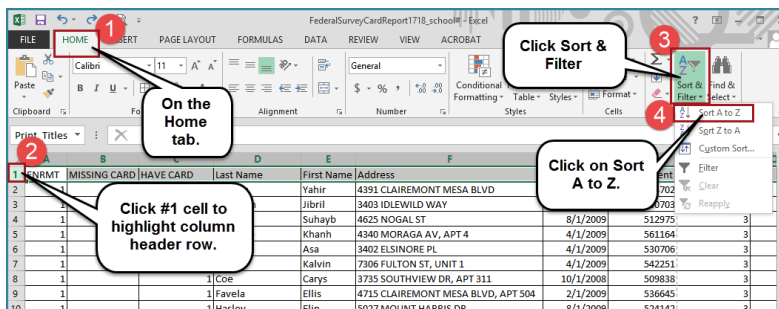


- b. Click **View** tab and select **Page Break Preview**.
- c. Move the blue lines to include the 9 required columns (see list in #1)

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

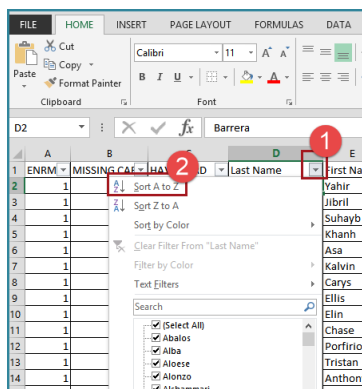


If you have not added the filter function, follow the steps below:



When the filters are applied:

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



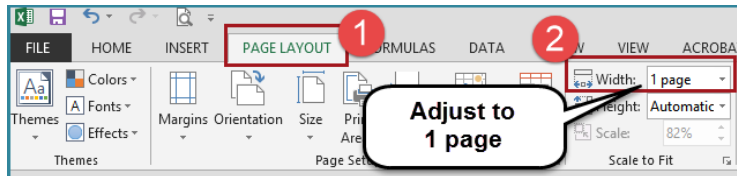
3. Then click OK.  
Look over your report data to be sure it is in the appropriate order.



## Record Your Information on Bottom of Report

- Before printing, **type** your name, phone number and e-mail address at the bottom of the report.
- 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:



- On the last page of your printed report, **Circle** the total number in the **HAVE CARD** column.
- 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 BAROLO	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				Yan	Italia	4146 RAPPAHANNOCK	566071	1
1				Zamorano	Nestor	4079 HUERFANO AVE	528240	3
1				Zamorano	Starr	4441 MORAGA AVE	414147	3
1				Zipp	Nevin	3511 IDLEWILD WAY	528263	3
159	1	1	158					
Staff member responsible for survey:			Suzie Seals		<i>Suzie Seals</i>	October 20,2017		
Email:			<a href="mailto:sseals@sandi.net">sseals@sandi.net</a>					
Phone#:			(858)291-1234					

8.

## Submit Completed Report and Cards

- 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 cards, bring them to the **Impact Aid Office, Room 3244 at the Education Center.**
- Please contact the Impact Aide Office with any Federal Survey Card 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 Page of Federal Survey Card Report

17/18 Federal Survey Card Report  
Sample Elementary School, Loc#0123

ENRMT	MISSING CARD	HAVE CARD	Last Name	First Name	Address	Birthdate	Student Ident	Grade Number
1		1	Tims	Alexander	2635 DEERPARK DR	9/1/2007	387045	5
1		1	Tom	Donell	2552 IMPERIAL AVE	10/1/2011	570723	0
1		1	Tompkins	Valorie	3497 ACCOMAC AV	5/1/2010	444202	2
1		1	Torres Garcia	Genesis	3124 COWLEY WAY, APT 2		009 524708	2
1		1	Urias	Harry	4512 CLAIREMONT DR		11 587332	1
1		1	Van				07 533297	5
1		1					10 446199	1
1		1					9 548687	2
1		1					8 604475	4
1		1					570297	1
1		1					604466	4
1		1					564915	0
1		1				5/1/2009	537783	3
1		1			4569 CLARENSE AVE, APT 113	4/1/2009	528250	2
1		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		<i>Suzie Seals</i>	October 20,2017		
Email:			<a href="mailto:sseals@sandi.net">sseals@sandi.net</a>					
Phone#:			(858)291-1234					

**Sample Report**

Landscape format  
Include only the columns shown  
Print on 8 1/2 x 11 paper

\\PRDECHOME16\16\163\163876\Desktop\FederalSurveyCardReport1718\_school# Sof 5

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

