

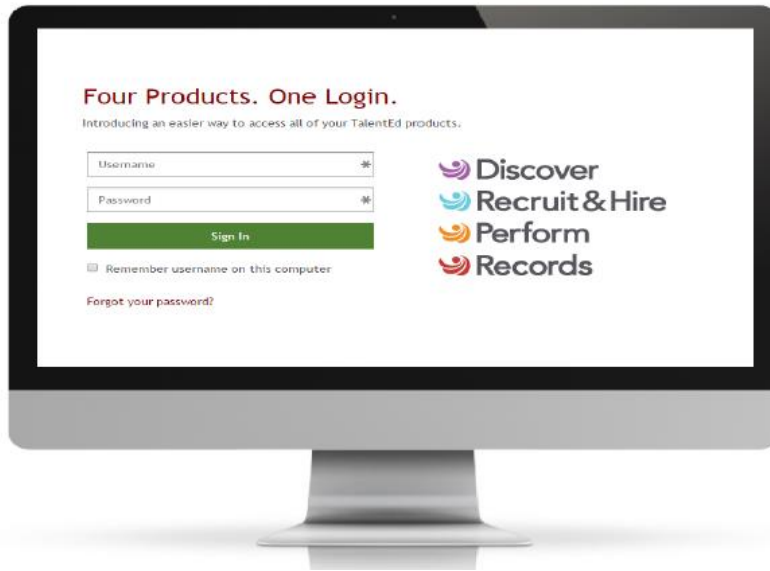
End User Guide

System Overview

To begin Using Records, first log in using the credentials provided to you by your organization.

If it's your first time using Records, you will need to choose "Logging in for the first time" to create your own password.

If you have trouble logging in, you can click on the 'Forgot your password?' link to have an email sent to you to have your password reset.



My Tasks

My Tasks

Needs Attention

Completed

All

Task	Related Staff	Checklist	Due Date	Delete	Actions
19	Betty Boop	Onboarding Checklist			<button>View</button>
Paper to EForm Handout	Betty Boop	Onboarding Checklist			<button>View</button>
SAMPLE - WELCOME VIDEO	Betty Boop	Test Checklist	2/28/2020		<button>View</button>
Basic Employee Info	Betty Boop	Test Checklist	2/28/2020		<button>View</button>

When you first log into Records, you will be taken to the **My Tasks** page. This is where you can view and complete any outstanding tasks you have been assigned. The **My Tasks** screen is where you can view all tasks you have been assigned through Records. You will notice there are two tabs on this screen.

My Tasks

Needs Attention Completed

Task	Related Staff	Checklist	Due Date	Delete	Actions
Culture Video	Betty Boop	Onboarding Checklist			View
Email/Network setup	Betty Boop	Test Checklist			View

The **Needs Attention** tab will indicate which tasks still require action on your part. To take action, click **View** to open the form. You may be asked to fill out a new form or Sign or Approve a form that has been submitted to you.

Employee Information ✕

Employee Information

Full Name required

Job Title

Date of Birth required
 Allowed format is MM/DD/YYYY Ex: 02/26/2021

Social Security Number required

Address required

Personal Phone Number required

Close Print Print as PDF Save Draft Save Final

Some tasks are not associated with a form at all. These tasks will include a **Mark as Done** button next to them. When you have completed the appropriate tasks simply click Mark as Done to remove it from your Needs Attention list.

My Tasks

Needs Attention **Completed**

All	schedule				
Task	Related Staff	Checklist	Due Date	Delete	Actions
<input type="checkbox"/> Schedule In-Person Meeting with HR for I9 Documents	Betty Boop	Onboarding Checklist			Mark as Done

This page also includes a **Completed** tab for your reference. Keep in mind that tasks may not show up on your Completed tab immediately if they require a review or signature by other staff in your organization.

My Tasks

Needs Attention **Completed**

All	schedule			
Task	Related Staff	Checklist	Submitted	Actions
Schedule In-Person Meeting with HR for I9 Documents	Betty Boop	Onboarding Checklist	2/26/2021	

1 - 1 of 1 Results Results Per Page **10**

Use the search field to quickly locate a task in your task list.

My Tasks

Needs Attention **Completed**

All	search	
Task	Related Staff	Checklist
Eau Claire Contract Sub	Athletics Admin	
Tai Test	Athletics Admin	

1 - 2 of 2 Results

Advanced Search for Your Tasks ✕

Advanced Search for Your Tasks

- Use the "+" sign to add search criteria.
- Click column headings to sort by column.
- Search settings are saved between sessions.

[Done](#)

Files

The screenshot shows the PowerSchool user interface. On the left sidebar, under the 'Available Forms' section, the 'Files' icon (a folder) is highlighted with a red rectangular box. A red arrow points from the right towards this box. The main content area is titled 'My Tasks' and shows a filter for 'Completed' tasks. A single task is listed: 'Schedule In-Person I'. Below the task list, it says '1 - 1 of 1 Results'.

Files

Betty Boop

Employee ID: 6789
Job Type: Counselor














Primary Location: Central Office
Supervisor: Thomas Davis

Phone: 1234567899
Email: bettyboopisreal@gmail.com

[Folders and Checklists](#)

[File List](#)

Folders

 Certifications	 Contracts & Agreements	 Discipline	 Employee Benefits	 I-9	 Invoices	 Leave	 Payroll	 Personnel
 Professional Development	 Resources	 Responsible Use Policy	 Technology Folder					

Files

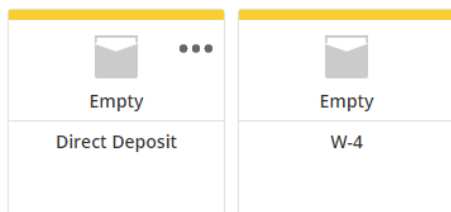
Betty Boop

Employee ID: 6789
Job Type: Counselor

Primary Location: Central Office
Supervisor: Thomas Davis

Phone: 1234567899
Email: bettyboopisreal@gmail.com

[Folders](#) > [Payroll](#) > [Sleeves](#)

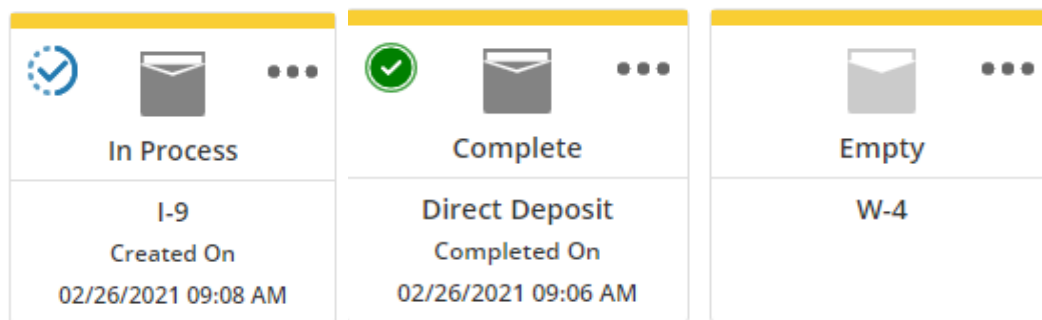


Loose Documents In Payroll Folder

Documents in Records are sorted into **Folders** based on the type of document. The first image shows a sample Folder structure you might see when you click on the Files button. This allows Payroll documents to be grouped together, Personnel documents to be grouped together, so on and so forth. Users will see different Folders based on the access they need.

Once allocated to a folder you can see how each Document is sorted into its unique individual **Sleeve**. The second image shows what a sample Payroll Folder might include.

-Sleeves will indicate whether they contain a completed e-form or document, if the document is in process, or they are empty.



Supervisor Tools

As a **Supervisor** you will have access to view Staff who report directly to you. Your view of Records will include a **Staff List** when you click the Magnifying Glass in the top, right side of the page. You can use the **Search** field to quickly find a staff member in the Staff List. Click on a staff member to open their files (you may see fewer files than you see for yourself based on the security settings defined by your system owner). You will also be able to track the progress your staff are making on any assigned **Checklists**. To move a staff member to the top of your Staff List, toggle the pin icon on the right side of the staff name. This will pin them to the top of your Staff List until you click the pin again to unpin them.

