

Washtenaw ISD
 A REGIONAL EDUCATIONAL SERVICE AGENCY

DOCUMENTLOK IN POWERSCHOOL

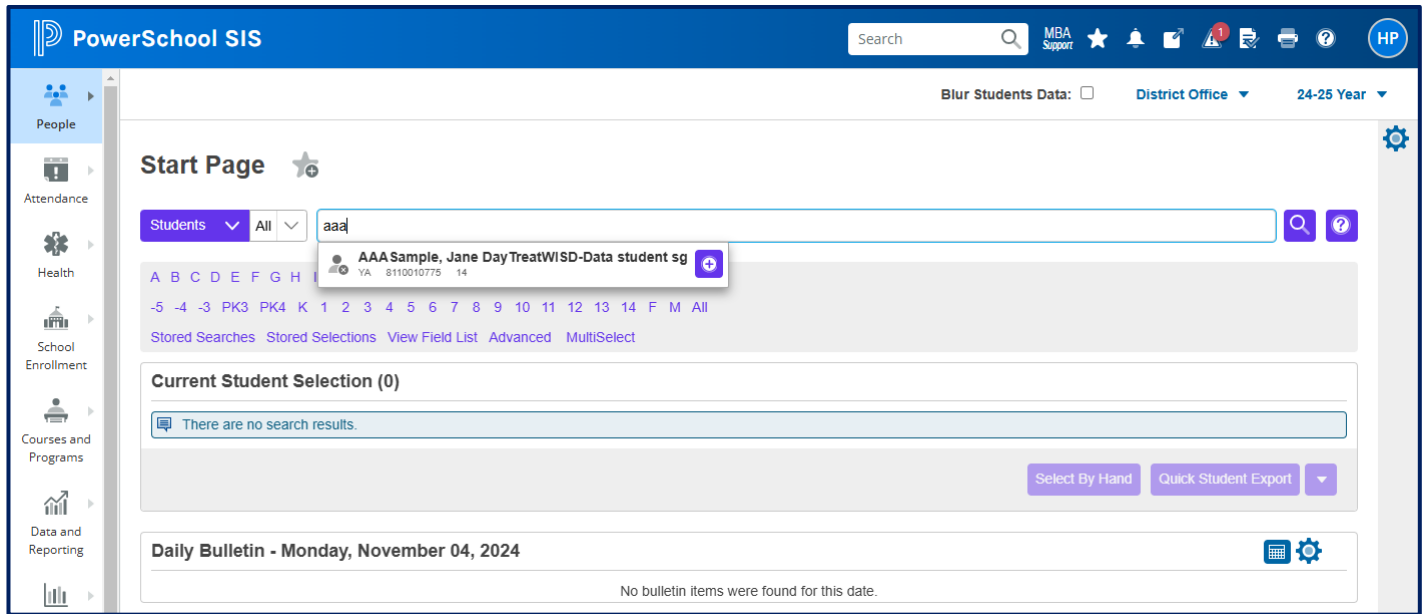
This document is to give a run through of the DocumentLOK PowerSchool plugin. It will cover the main screen of the plugin, how to file and scan, and the other functionalities of DocumentLOK.

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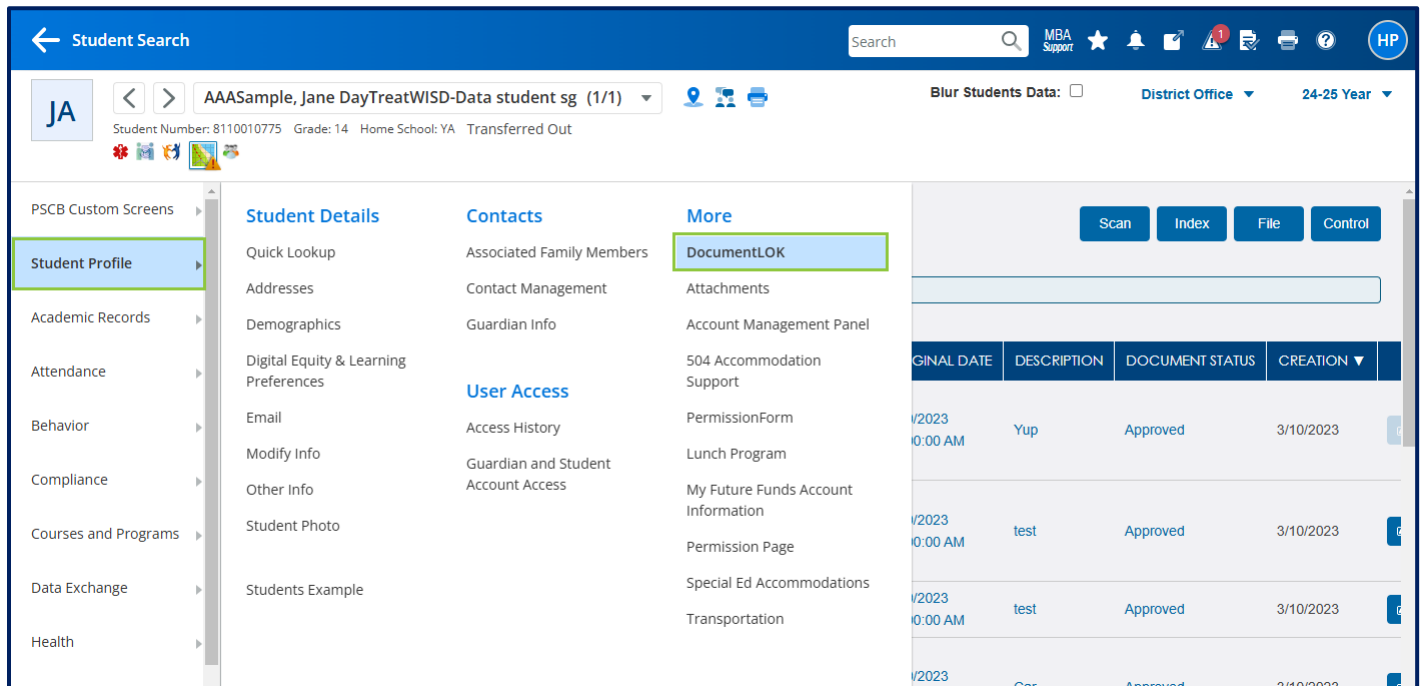
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DocumentLOK in PowerSchool Overview



1 In PowerSchool at the Start Page, search for your student.



2 In the left navigation of the student's screen, click Student Profile > DocumentLOK.

Student Documents ★ Scan Index File Control

Select Multiple

| CATEGORY | DOCUMENT TYPE | ORIGINAL DATE | DESCRIPTION | DOCUMENT STATUS | CREATION |
|-------------------------------------|-------------------|-----------------------|-------------|-----------------|-----------|
| Birth Certificate or Pupil Identity | Driver's License | 3/10/2023 12:00:00 AM | test | Approved | 3/10/2023 |
| Proof of Residency | Utility Bill | 3/10/2023 12:00:00 AM | test | Approved | 3/10/2023 |
| Birth Certificate or Pupil Identity | Birth Certificate | 3/10/2023 12:00:00 AM | test | Approved | 3/10/2023 |
| Birth Certificate or Pupil Identity | Birth Certificate | 1/2/2023 12:00:00 AM | Cookie Info | Approved | 1/2/2023 |
| Birth Certificate or Pupil Identity | Birth Certificate | 1/2/2023 12:00:00 AM | Cookie Info | Approved | 1/2/2023 |

These are organization folders of documents based on category type.

Each field that is highlighted blue under the headers is a hyperlink and can be edited.

ORIGINAL DATE DESCRIPTION

Edit Original Date

04/11/2010

Save

3 Each column header can be sorted by ascending or descending order by clicking on the header name. The first column shows an icon of the document file type. Below is a breakdown of each header type:

Document Format: PDF, TIFF, JPG, PNG, GIF, Paper

Category: This is a form of organizing the document types.

Document Type: A document type is a label given to the documents.




































Original Date: This date is the original date of the document. For example, if you are filing a student's IEP you will want to enter the date of the IEP meeting/completion as the Original Date.

Description: This field is optional. This gives you the ability to add more verbiage to a document type.








Document Status: Documents can be set to Approved or Pending. This functionality will not be used for scanning and filing in PowerSchool.

Creation: This is the date that the document was filed into DocumentLOK and will be populated automatically.

Function Icons & Their Definitions

| | | | | Scan | File | | | | |
|--------|-----------------|------------|---|---|---|---|---|--|---|
| OPTION | DOCUMENT STATUS | CREATION ▼ | | | | | | | |
| | Approved | 4/19/2023 |  |  |  |  |  |  |  |
| | Approved | 4/19/2023 |  |  |  |  |  |  |  |
| | Approved | 4/19/2023 |  |  |  |  |  |  |  |
| | Approved | 4/19/2023 |  |  |  |  |  |  |  |
| | Approved | 4/19/2023 |  |  |  |  |  |  |  |

1 At the top right of the page, there is a Scan and File option. To the right of the Creation dates are buttons that allow you to work with the document. Listed below are what the icons are and their definition.

-  View – Allows you to view the document.
-  Move – Allows you to refile the document.
-  Download – Allows you to download the document.
-  Workbench – This enables you to work with multiple documents at a time.
-  Email – By clicking this an email window open with the option to select Outlook or Gmail. **Caution you cannot send encrypted using this function. It is recommended to download the document first and then send it using an email application where encryption is enabled.**
-  Print – This will open a window to print the document.
-  Delete – This function is for admin users only.

Selecting Multiple Documents

The screenshot shows the 'Student Documents' interface. At the top, there is a search bar and navigation icons. Below the search bar, the student's name 'AAASample, Jane DayTreatWISD-Data student sg (1/1)' is displayed. The main area is titled 'Student Documents' and contains a table of documents. A checkbox labeled 'Select Multiple' is checked. At the top right of the table, there are three action buttons: 'Download', 'Workbench', and 'Email'. The table has the following columns: 'CATEGORY', 'DOCUMENT TYPE', 'ORIGINAL DATE', 'DESCRIPTION', 'DOCUMENT STATUS', and 'CREATION'. The table contains several rows of document information.

| | CATEGORY | DOCUMENT TYPE | ORIGINAL DATE | DESCRIPTION | DOCUMENT STATUS | CREATION |
|--------------------------|-------------------------------------|-------------------|------------------------|-------------|-----------------|------------|
| <input type="checkbox"/> | Birth Certificate or Pupil Identity | Driver's License | 3/10/2023 12:00:00 AM | test | Approved | 3/10/2023 |
| <input type="checkbox"/> | Proof of Residency | Utility Bill | 3/10/2023 12:00:00 AM | test | Approved | 3/10/2023 |
| <input type="checkbox"/> | Birth Certificate or Pupil Identity | Birth Certificate | 3/10/2023 12:00:00 AM | Car | Approved | 3/10/2023 |
| <input type="checkbox"/> | Birth Certificate or Pupil Identity | Birth Certificate | 1/2/2023 12:00:00 AM | | Approved | 1/2/2023 |
| <input type="checkbox"/> | Birth Certificate or Pupil Identity | Driver's License | 12/21/2022 12:00:00 AM | test1 | Approved | 12/21/2022 |
| <input type="checkbox"/> | Birth Certificate or Pupil Identity | Birth Certificate | 12/20/2022 12:00:00 AM | test | Approved | 12/20/2022 |

1 By checking the box next to Select Multiple, empty check boxes will populate next to the document. You can check as many as needed and then Download, use the Workbench, or Email by clicking the function icon buttons at the top right of the screen.

Filing Documents

The screenshot shows the iS system interface. On the left, a table lists documents with columns for Category, Document Type, Original Date, and Description. On the right, a 'File Documents' form is open, containing fields for PS Student Number, Student Name, Category, Document Type, Original Date, Description, Document Status, State Student Number, LEA District, District of Residence, School, Date of Birth, and Graduation Year. A green box highlights the 'Choose Files' button and the 'Category', 'Document Type', and 'Original Date' fields in the form.

| CATEGORY | DOCUMENT TYPE | ORIGINAL DATE | DESCRIPTION |
|-------------------------------------|-------------------|-----------------------|-------------------|
| Academics | 105C Agreement | 4/19/2023 12:00:00 AM | Test bt |
| Birth Certificate or Pupil Identity | Enrollment Forms | 4/11/2010 12:00:00 AM | Birth Certificate |
| English Language Learner | Document Archive | 4/18/2023 12:00:00 AM | Test |
| Document Archive | Document Archive | 4/18/2023 12:00:00 AM | Test |
| Academics | 105C Agreement | 4/19/2023 12:00:00 AM | |
| Birth Certificate or Pupil Identity | Birth Certificate | 3/10/2023 12:00:00 AM | Yup |
| Birth Certificate or Pupil Identity | Driver's License | 3/10/2023 12:00:00 AM | test |
| Proof of Residency | Utility Bill | 3/10/2023 12:00:00 AM | test |
| Birth Certificate or Pupil Identity | Birth Certificate | 3/10/2023 12:00:00 AM | Car |

File Documents

Browse Available

No file chosen

PS Student Number
8110010775

Student Name
AAASample, Jane DayTreatWISD-Data student sg

*Category
Academics

*Document Type
105C Agreement

*Original Date:
mm/dd/yyyy

Description

*Document Status
Approved

*State Student Number
TESTCIY001

LEA District
81010

District of Residence
81100

School
6147

Date of Birth:
01/01/1996

Graduation Year
2021

Tip: press ENTER in the PS Student Number or Student Name box to search and autofill fields

cancel and close

1 To upload a document:

1. Click the **File** button at the top right.
 - a. A drawer will come out to the right of the screen.
2. Click **Choose Files** to select the document you want to upload.
 - a. A File Explorer window will pop up for you to select a document.
3. Select the document.
4. Fill out the following required fields.
 - a. Category
 - b. Document Type
 - c. Original Date
5. Verify the other information is correct, then click **Upload**.

The screenshot shows the 'File Documents' drawer with a green success message: '1 document uploaded'. A blue box with a white X is visible in the top right corner of the drawer.

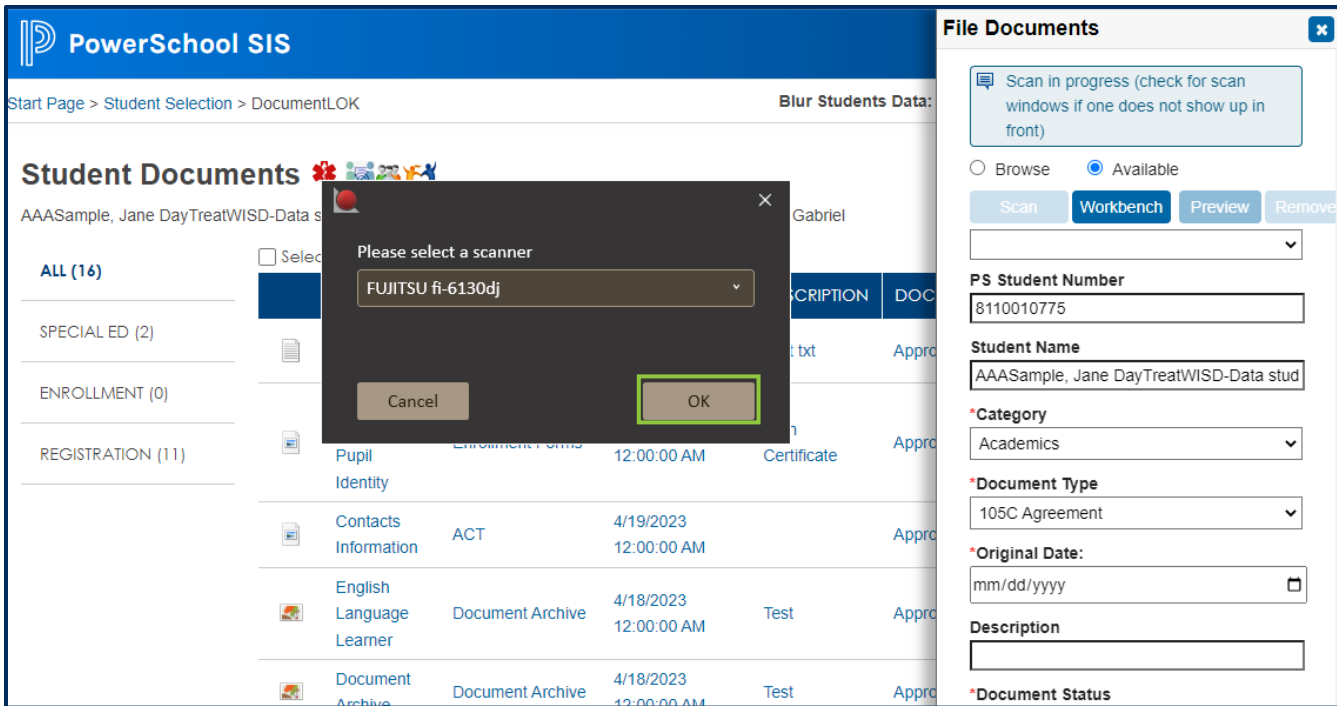
File Documents

✓ 1 document uploaded

- a.
- b. Click on the blue box with the white X to close the drawer.

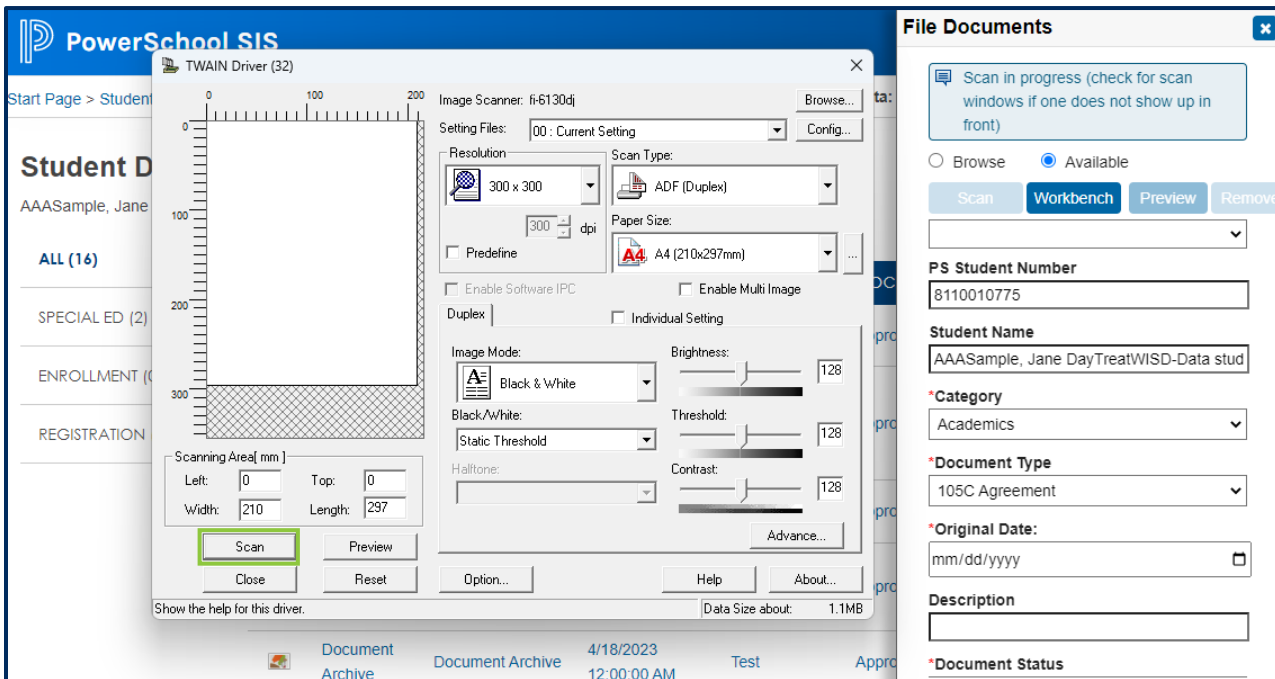
The student's information will already be populated, as well as most of the document's indexes.

Scanning Documents



1 To scan a document to upload into PowerSchool, click on the blue Scan button at the top of the page. A new window will open prompting you to select a scanner. Select your scanner and click OK.

The system will remember the last scanner that was used.



2 A driver window from your scanner will pop up, click on Scan.

school SIS

Selection > DocumentLOK

Blur Students Data: District Office

Documents

ayTreatWISD-Data student sg 14 8110010775 HP 2021 01/01/1996 F Gabriel

or upload. Complete the filing process via the file panel.

Select Multiple

| | CATEGORY | DOCUMENT TYPE | ORIGINAL DATE | DESCRIPTION | DOCUMENT STATUS | CREA |
|--|-------------------------------------|------------------|--------------------------|-------------------|-----------------|--------|
| | Academics | 105C Agreement | 4/19/2023 12:00:00 AM | Test txt | Approved | 4/19/2 |
| | Birth Certificate or Pupil Identity | Enrollment Forms | 4/11/2010 12:00:00 AM | Birth Certificate | Approved | 4/19/2 |
| | Contacts Information | ACT | 4/19/2023 12:00:00 AM | | Approved | 4/19/2 |
| | English Language Learner | Document Archive | 4/18/2023 12:00:00 AM | Test | Approved | 4/19/2 |

File Documents

1 document is available

Browse Available

Scan Workbench Preview Remove

TIF, 156.7 KB (expires: 26 min)

Copy

PS Student Number
8110010775

Student Name
AAASample, Jane DayTreatWISD-Data stud

*Category
Special Education

*Document Type
Accommodations

*Original Date:
04/20/2023

Description
IEP Accommodations

*Document Status

3 When the document has been scanned, it will show it as a TIF in Available. Here you can fill out the rest of the fields.

school SIS

Selection > DocumentLOK

Blur Students Data: District Office

Documents

ayTreatWISD-Data student sg 14 8110010775 HP 2021 01/01/1996 F Gabriel

or upload. Complete the filing process via the file panel.

Select Multiple

| | CATEGORY | DOCUMENT TYPE | ORIGINAL DATE | DESCRIPTION | DOCUMENT STATUS | CREA |
|--|-------------------------------------|------------------|--------------------------|-------------------|-----------------|--------|
| | Academics | 105C Agreement | 4/19/2023 12:00:00 AM | Test txt | Approved | 4/19/2 |
| | Birth Certificate or Pupil Identity | Enrollment Forms | 4/11/2010 12:00:00 AM | Birth Certificate | Approved | 4/19/2 |
| | Contacts Information | ACT | 4/19/2023 12:00:00 AM | | Approved | 4/19/2 |
| | English Language Learner | Document Archive | 4/18/2023 12:00:00 AM | Test | Approved | 4/19/2 |

File Documents

IEP Accommodations

*Document Status
Approved

*State Student Number
TESTCIY001

LEA District
81010

District of Residence
81100

School
6147

Date of Birth:
01/01/1996

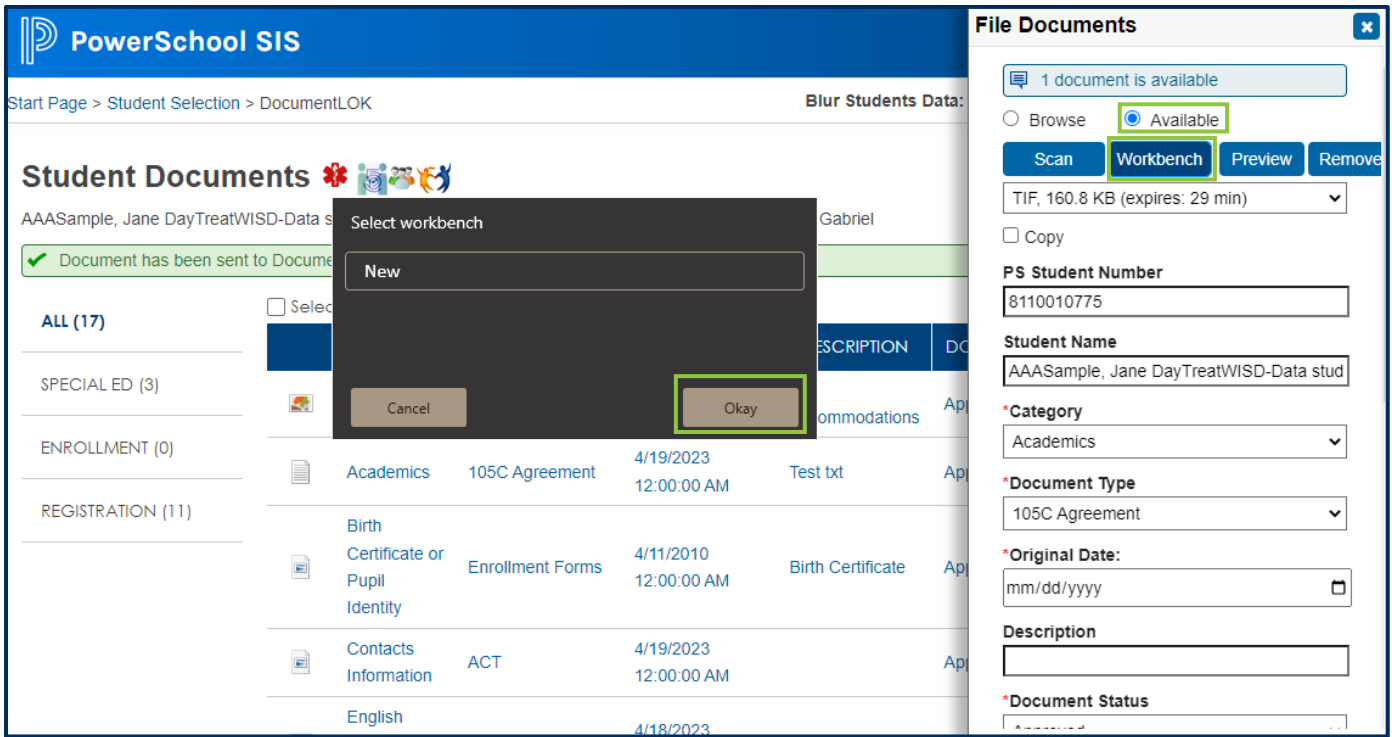
Graduation Year
2021

Tip: press ENTER in the PS Student Number or Student Name box to search and autofill fields

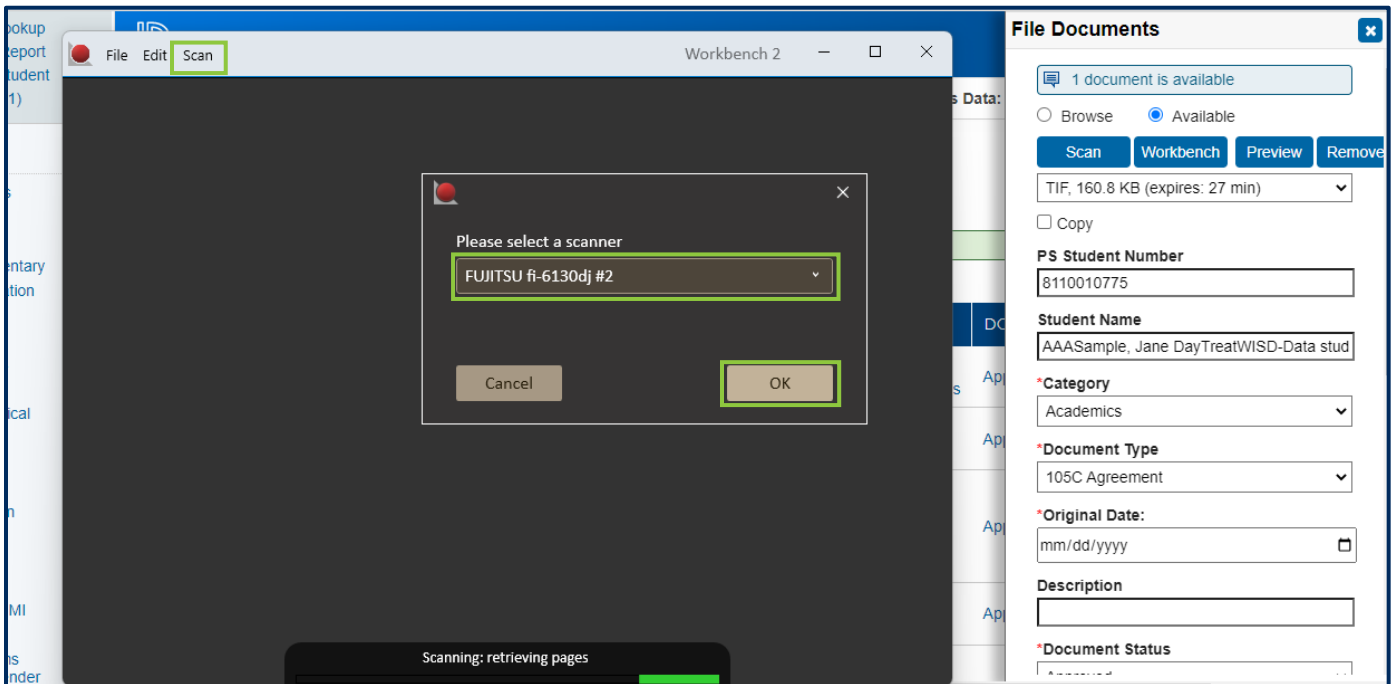
Upload cancel and close

4 After the fields have the correct information, click Upload. The document will now be filed into the student's repository.

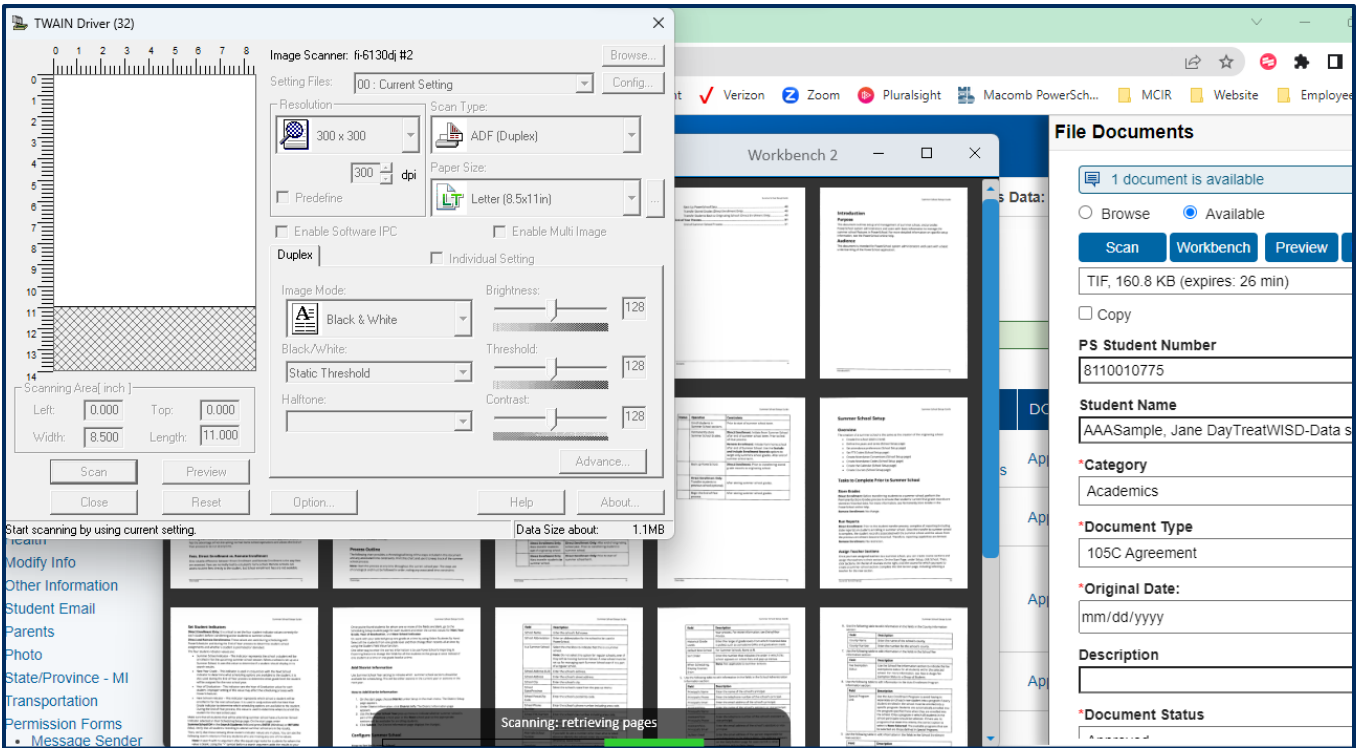
Workbench



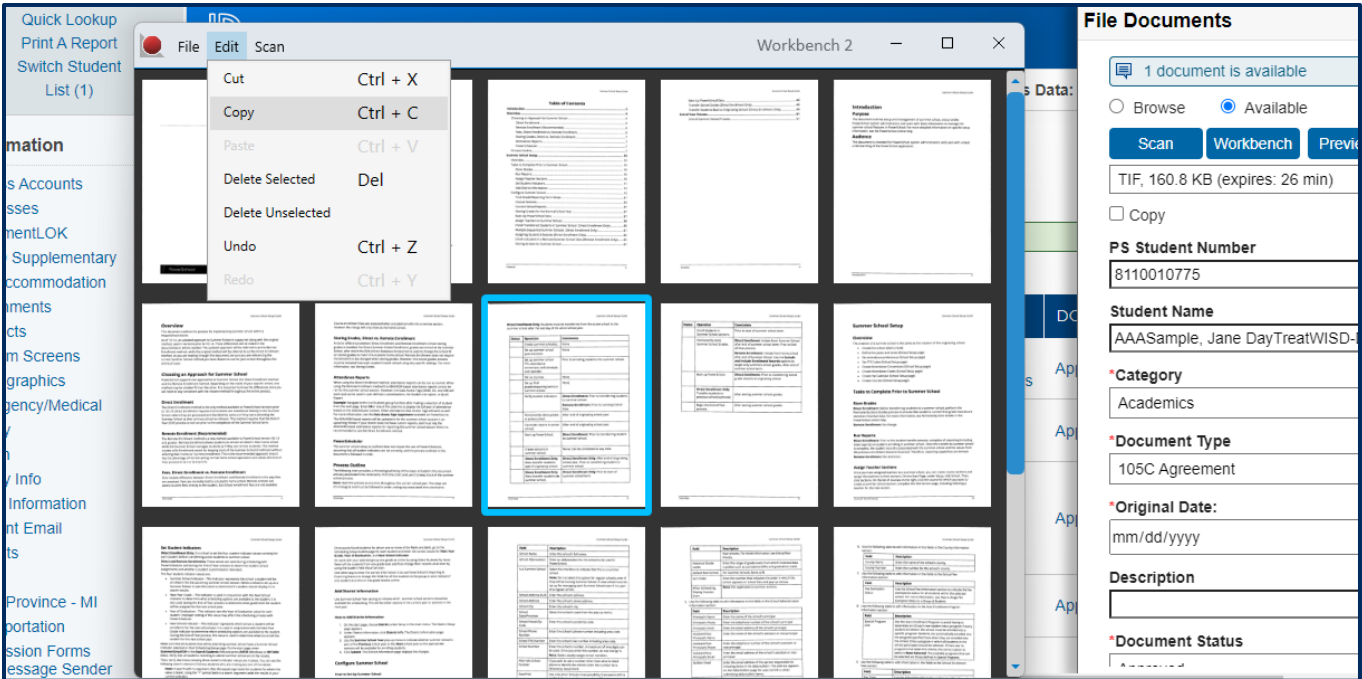
1 To open the Workbench, click on Scan and the drawer will open. Click Available and then Workbench. A new window will open, click Okay.



2 To scan, click Scan at the top left of the navigation bar. Select your scanner and click OK.

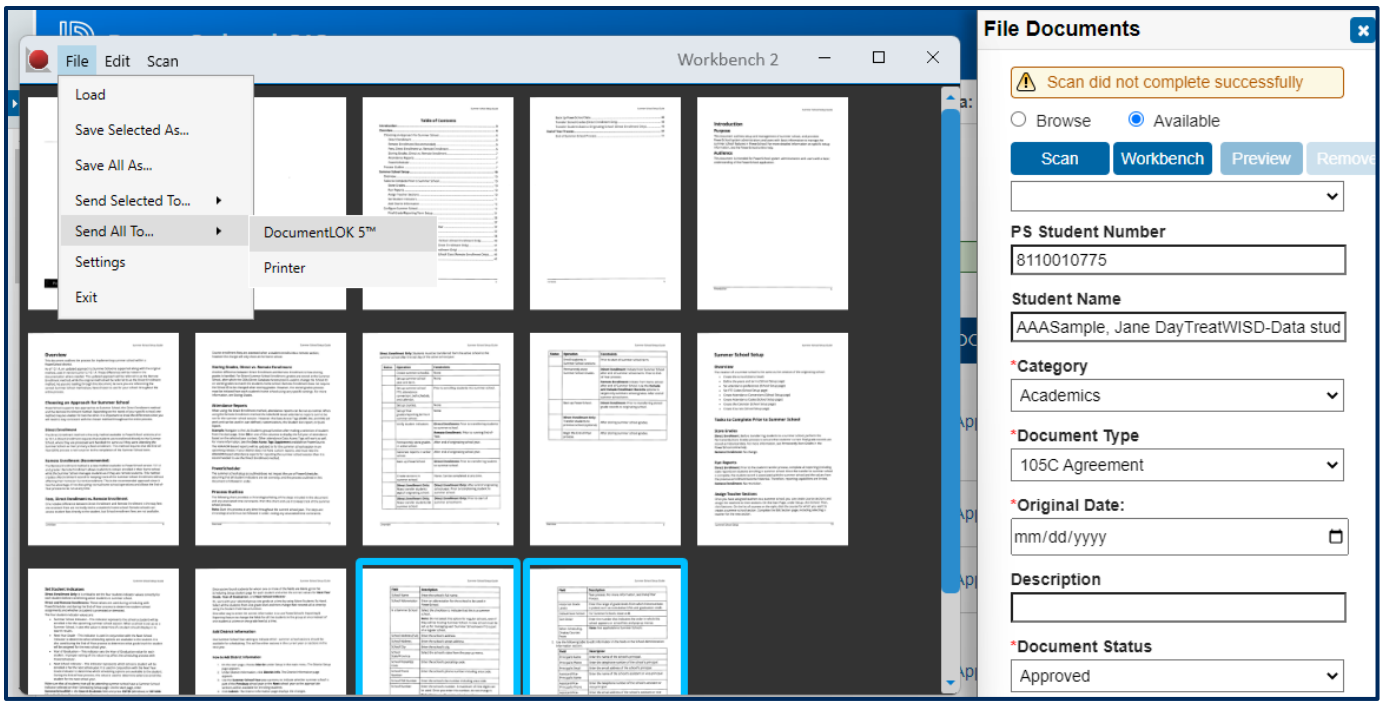


3 The driver window will pop up, click Scan. Then your documents will populate in the Workbench window.



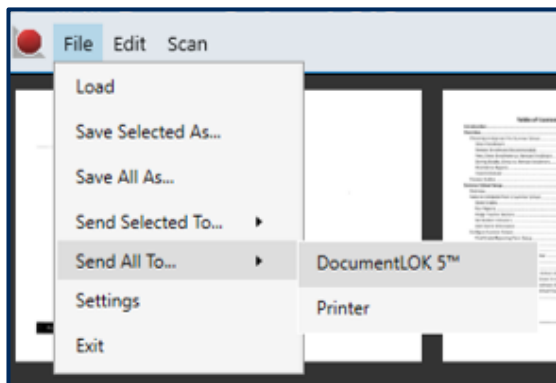
4 You can edit and manipulate the documents here. Click on a document page to select it, and it will be highlighted blue. Once the document is selected, you can cut, copy, paste, or delete multiple documents.

To select multiple documents, press CTRL while clicking on the pages. To rearrange the order of the documents, select a page and drag it to where you would like it to be.



5 To file into DocumentLOK, click File in the Navigation Bar. In the dropdown, select Send All To... > DocumentLOK 5.

6 Here is a breakdown of the options in File:



Load – Upload files from desktop, multiple files can be uploaded.

Save Selected As... - save the selected files to your desktop.

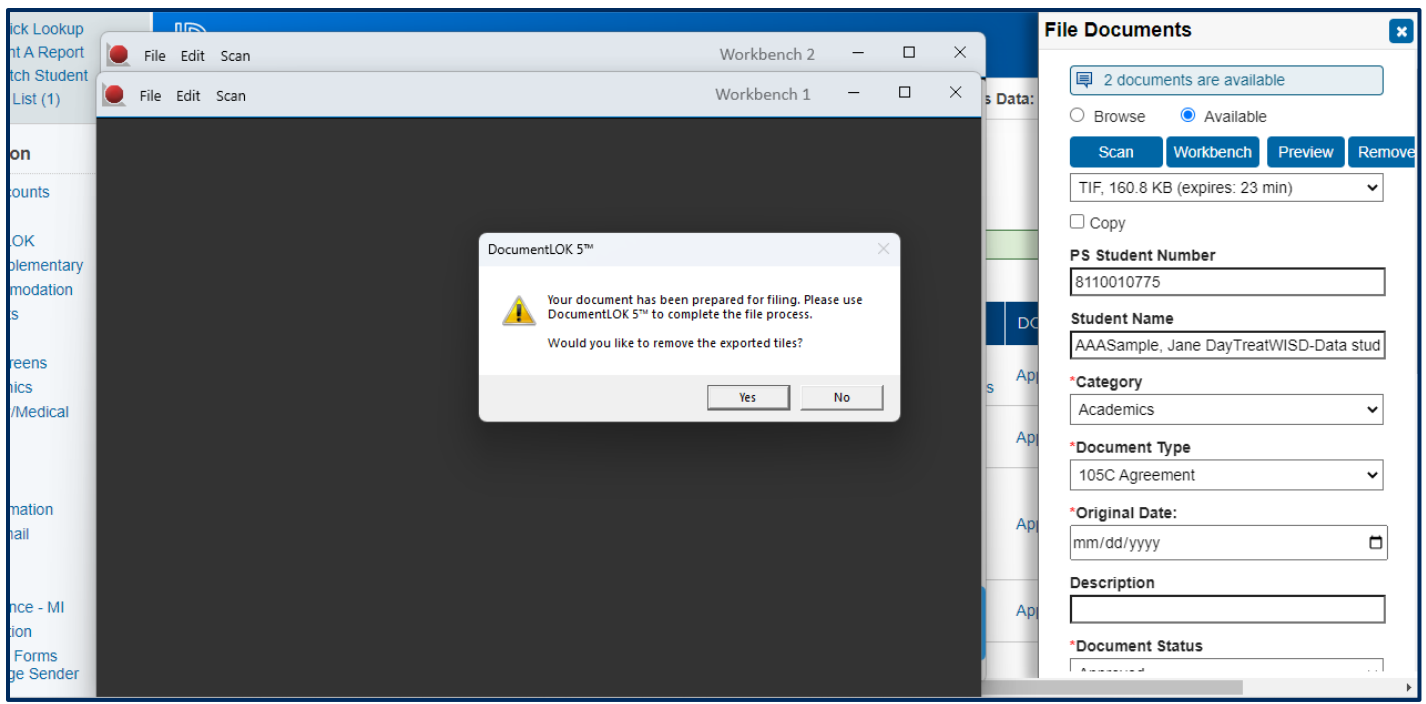
Save All As... - Save all the files in Workbench to your desktop.

Send Selected To... - Send the selected files to DocumentLOK to upload them into PowerSchool or send them to your printer to print.

Send All To... - Send all files to DocumentLOK to upload them into PowerSchool or send them to your printer to print.

Settings – Configure Directories, Default File Types, and Performance settings.

Exit – Close out of Workbench.



7 After sending the document to DocumentLOK, select Yes or No to remove the exported files. If Yes is selected, the documents in Workbench will be removed.

Your file will show in the drop down in the File Documents Drawer. Here you can complete the filing process. Once the indices are filled out, you can upload the document.