

Tennessee Skyward User Group Conference			
Wednesday, May 31 & Thursday June 1, 2023			
The Park Vista Gatlinburg TN			
Legend			
F - Financial Management	SM - Student Management	Q - Qmlativ All Products	
HR - Human Resources / Payroll	SR - State Reporting - Student Records		
Qmlativ Student Records	SR - State Reporting - Business		
Qmlativ Business	UL - Co Presented - User/Skyward		
**Suggested for New Users/Refresher for Seasoned Users			
DAY 1: Wednesday - May 31, 2023			
7AM - 8:30 AM Registration/Breakfast		Registration Lower Level	
		Breakfast Buffet - Hotel Restaurant - Must have ticket given at Conference Registration	
8:45 - 9:35 am - Work Session #1			
Room	Legend	Session	Presenters
Mountainview B	F	Next Level Purchasing	Aaron Messier
Mountainview C	SR/F	State Reporting Year End Processing	Emily Young
Mountainview D	HR	HR Year End Processing 1	Ann Nollinger
Ballroom 1	SM	**New Users/Refresher Boot Camp I	Arthur Summer/Courtney Adkins
Gardenview B	SM	**Features You Need to Know	Jacob Larsen
Gardenview C	SM	Gradebook Setup Administration - Preparing for New Year	Jim Bembenek
Gardenview D	SM	Help Yourself - Free Trainings for you	Ellen Rea
Ballroom 2	SR/SM	Special Programs Tab	Brandi McBrayer
Mountainview A	F/HR	Table / Help Desk	Marc Johnson
Gardenview A	SM	Table / Help Desk	Joe McBrayer
Lower Conference Lobby	Q	Table/Help Desk	Qmlativ Migration Team
9:45 - 10:35 am Work Session #2			
Mountainview B	F	Zooming in - Top Reports for Business Teams	Kathryn Smerz
Mountainview C	HR	Beginners Employee Data Mining	Marc Johnson
Mountainview D	HR	HR Year End Processing 2	Ann Nollinger
Ballroom 1	SM	**New Users/Refresher Boot Camp II	Courtney Adkins/Jacob Larsen
Gardenview B	SM	Custom Transcripts - Bring your laptop and Build them Now	Jim Bembenek
Gardenview C	SR/SM	ADM Troubleshooting: Common Issues & Solutions	Brandi McBrayer
Gardenview D	SM	Discipline Overview	Becky Thomason
Ballroom 2	Q/SM	Qmlativ Overview - Student	Ellen Rea
Mountainview A	F/HR	Table/Help Desk	Brent Siebring
Gardenview A	SM	Table/Help Desk	Jacob Larsen
Lower Conference Lobby	Q	Table/Help Desk	Qmlativ Migration Team
10:35 - 10:50 Coffee Break			
10:50 - 11:40 Work Session #3			
Room	Legend	Session	
Mountainview B	F/HR	SMS Newer Business Features/Finance Tips and Tricks	Aaron Messier
Mountainview C	HR	Employee Mid Year Changes - Assignment/Payroll	Kathryn Smerz
Mountainview D	HR	Task Manager for HR/Payroll Tasks	Marc Johnson
Ballroom 1	F/HR	Fiscal Year End	Brent Siebring
Gardenview B	SM	**Utilizing Processing Lists	Jacob Larsen
Gardenview C	SR/SM	Grading Set Up and State Reporting	Brandi McBrayer
Gardenview D	SM	Food Service Reporting	Ellen Rea
Ballroom 2	SM	Top Ten Reports for Office Personnel	Joe McBrayer
Mountainview A	F/HR	Table / Help Desk	Ann Nollinger
Gardenview A	SM	Table / Help Desk	Becky Thomason
Lower Conference Lobby	Q	Table/Help Desk	Qmlativ Migration Team
11:45 - 12:45 Welcome/Lunch			
12:55 - 1:45pm - Work Session #4			
Room	Legend	Session	Presenters
Mountainview B	F	AP Advanced Options	Kathryn Smerz
Mountainview C	SR/HR	State Reporting - Payroll/HR	Emily Young w/ Drew Freeman (TCRS)
Mountainview D	HR	Advanced Employee Data Mining	Marc Johnson
Ballroom 1	SM	Panel Student Discussion: Veteran Skyward Users	Arthur Summer
Gardenview B	SM	Online Enrollment - Students Returning	Becky Thomason
Gardenview C	SM	Future Scheduling Start to Finish - Overview	Jacob Larsen
Gardenview D	SM	Food Service Best Practices Q&A	Ellen Rea
Ballroom 2	Q/SM/B	Migration Center SMS to Qmlativ - What's in store?	Tim Casey
Mountainview A	F/HR	Table/Help Desk	Aaron Messier
Gardenview A	SM	Table/Help Desk	Joe McBrayer
Lower Conference Lobby	Q	Table/Help Desk	Qmlativ Migration Team
1:55 - 2:45pm - Work Session #5			
Room	Legend	Session	Presenters

Mountainview B	F	Beginners - Budgetary Data Mining	Brent Siebring
Mountainview C	F/HR	Newer Users and Refresher - FIN/HR	Aaron Messier
Mountainview D	SR/HR/F	W2s and 1099's	Marc Johnson
Ballroom 1	SR/SM	Student State Reporting Year End & Year Start	Brandi McBrayer
Gardenview B	SM	Grading Procedures and Discrepancies	Jim Bembenek
Gardenview C	SM	NSOE New Student Online Enrollment	Jacob Larsen
Gardenview D	SM	Skyward Game Show	Arthur Summer/Courtney Adkins/Ellen Rea
Ballroom 2	SM	**SMS Newer Student Features/Tips and Tricks	Becky Thomason
Mountainview A	F/HR	Table/Help Desk	Kathryn Smerz
Gardenview A	SM	Table/Help Desk	Joe McBrayer
Lower Conference Lobby	Q	Table/Help Desk	Ellen Rea
2:45 - 3:00 pm Break		Ballroom 3 & 4	
3:00 - 3:50pm - Work Session 6			
Room	Legend	Session	Presenters
Mountainview B	HR	True Time Rulegroup Options	Marc Johnson
Mountainview C	F	Budgeting Options	Aaron Messier
Mountainview D	HR	Employee Contract Letters and Posting to Online Forms	Kathryn Smerz
Ballroom 1	SR/SM	State Reporting Updates/Best Practices	Brandi McBrayer
Gardenview B	SM	Health Records - Meds/Inventory/Reporting	Becky Thomason
Gardenview C	SM	Top Ten Reports for Administrators	Joe McBrayer
Gardenview D	SM	**Student Data Mining Beginning	Courtney Adkins/Jim Bembenek
Ballroom 2	SM	Food Service - Free-Reduced-Direct Cert	Ellen Rea
Mountainview A	F/HR	Table/Help Desk	Ann Nollinger
Gardenview A	SM	Table/Help Desk	Arthur Summer
Lower Conference Lobby	Q	Table/Help Desk	Qmlativ Migration Team
4:00 - 4:50pm - Work Session #7			
Room	Legend	Session	Presenters
Mountainview B	HR	HR Custom Forms	Aaron Messier
Mountainview C	F	Advanced Budgetary Data Mining	Brent Siebring
Mountainview D	F/HR	Salary Negotiations and Budgeting	Ann Nollinger
Ballroom 1	SM	Legal Names/Preferred Names	Jim Bembenek
Gardenview B	SR/SM	The In's and Out's of Extracts	Joan Palmer/Susan Dean/Brandi McBrayer
Gardenview C	SM	Student Management Year End/School Level	Joe McBrayer
Gardenview D	SM	Guidance Counselor Boot Camp	Becky Thomason
Ballroom 2	SM	**Attendance Letter Set Up/ Maintenance/Utilities	Jacob Larsen
Mountainview A	F/HR	Table/Help Desk	Kathryn Smerz
Gardenview A	SM	Table/Help Desk	Arthur Summer
Lower Conference Lobby	Q	Table/Help Desk	Qmlativ Migration Team
5:00 PM COMPLIMENTARY RECEPTION		Outdoor Pavillion	
Day 2 Thursday - June 1, 2023			
7:00 - 8:30 am Breakfast		Breakfast Buffet - Hotel Restaurant - Must have ticket given at Conference Registration	
8:45 - 9:35 am - Work Session #8			
Room	Legend	Session	Presenters
Mountainview B	HR	Subtracking/Time Off Importing	Ann Nollinger
Mountainview C	SR/HR	State Reporting- TCRS	Drew Freeman (TCRS) w/Emily Young
Mountainview D	F	Credit Card Processing	Aaron Messier
Ballroom 1	SM	**Utilizing Processing Lists	Jacob Larsen
Gardenview B	SR/SM	State Reporting - Transportation	Brandi McBrayer
Gardenview C	SM	Secondary Gradebook Overview	Jim Bembenek
Gardenview D	SM	Student Management Year Start/School Level	Joe McBrayer
Ballroom 2	SM	Key Attendance Reports - Entity and District Level	Arthur Summer
Mountainview A	F/HR	Table/Help Desk	Marc Johnson
Gardenview A	SM	Table/Help Desk	Becky Thomason
Lower Conference Lobby	Q	Table/Help Desk	Qmlativ Migration Team
9:45 - 10:35 am - Work Session #9			
Room	Legend	Session	Presenters
Mountainview B	HR	Payroll Reporting Possibilities	Marc Johnson
Mountainview C	Q/HR/F	Qmlativ Overview - Business	Kathryn Smerz
Mountainview D	F	A/P Processing and Reporting A-Z	Ann Nollinger
Ballroom 1	SM	GPA Calculation\Honor Roll\Class Rank\Transcripts	Jim Bembenek
Gardenview B	SR/SM	Student Schedules and State Reporting	Brandi McBrayer
Gardenview C	SM	**New Users Roundtable - Q & A	Courtney Adkins/Becky Thomason
Gardenview D/E	SM	Data Mining - Advanced	Arthur Summer
Ballroom 2	SM	**Custom Forms Making Them Work for You	Jacob Larson
Mountainview A	F/HR	Table/Help Desk	Aaron Messier
Gardenview A	SM	Table/Help Desk	Joe McBrayer
Lower Conference Lobby	Q	Table/Help Desk	Qmlativ Migration Team
10:35 - 10:50 am Break		Ballroom 3 & 4	

10:50 - 11:40 am- Work Session #10			
Room	Legend	Session	Presenters
Mountainview B	HR	HR/Payroll Tips & Tricks	Kathryn Smerz
Mountainview C	HR	True Time Troubleshooting	Ann Nollinger
Mountainview D	SR/F	Finance State Reporting	Emily Young
Ballroom 1	SM	Administrative Bootcamp	Becky Thomason
Gardenview B	SR/SM	EIS Processing/Roundtable	Brandi McBrayer
Gardenview C	SM	**Advanced Features	Joe McBrayer
Gardenview D	SM	Custom Report Cards - Secondary	Jim Bembenek
Ballroom 2	SM	Test Score Setup and Import	Arthur Summer
Mountainview A	F/HR	Table/Help Desk	Brent Siebring
Gardenview A	SM	Table/Help Desk	Jacob Larsen

CONFERENCE 2023 SESSION DESCRIPTIONS

Student Management – State Reporting – Finance/Payroll/HR

Skyward All Products

Qmlativ Migrations Team Table: drop by for questions on the SMS to Qmlativ Migration Process

Student Management Sessions

SESSION 1

Features You Need to Know – Tips and Tricks for New Users and Seasoned Users – Find features that are in the system that are shortcuts to streamline your work load – fun features that can help you navigate the system quicker – change color schemes – exporting to excel – just to name a few of those hidden gems that will make your work easier and more fun!

New Users/Refresher Bootcamp Part 1 Student - This session covers the essentials of using Skyward and is designed with new users in mind. Our goal is to provide you with a solid foundation in navigating and using the system that will allow you to make the most out of your Skyward software. Entry/Withdrawal, Editing Families, Basic Attendance Entry

Gradebook Administration – Preparing for the New Year - This session will cover basic gradebook set up for users new to the Skyward gradebook and provide insights on making sure your Gradebooks are ready to go for the new school year.

Help Yourself! – Tips and tricks and directions to show you how to use SkyDoc – Skyward Academy for training sessions – Webex sessions – short session topics and full training sessions – all for free!

Migration Center SMS to Qmlativ – What's in Store - - Is your district thinking about migrating to Qmlativ? If so, you won't want to miss this session! We'll show you around the all-new Migration Center—your info-packed, step-by-step migration hub—and go over what that preparation process will entail.

Session 2

New Users/Refresher Bootcamp Part 2 – A continuation of Part 1, this session will cover Fun with Filters, Tips and Tricks for Navigating the system, Underutilized Features and a Question/Answer Session.

Custom Transcripts - This session will cover the steps needed to create Custom Transcripts. Make your transcripts fit your needs.

Discipline Overview - In this session we will discuss entering Discipline records for students, Auto email options, what families can see in Family Access and giving teachers access to enter Discipline

Qmlativ Overview – Student Records - This session will cover some tips and tricks that allow efficient navigation in the Qmlativ Student Product.

Session 3

Utilizing Processing Lists - Learn how to build a report in one area of the software and then use the students from that list to create reports/mailing labels etc., from different areas.

Food Service Reporting – This session will focus on common Food Service Reports such as, the Daily Activity Report, the Accuclaim & Accuclaim Audit report and various other reports which may make your work easier. We will review the set up and display of data along with the concept behind the “why”.

Top 10 Reports for Office Personnel - This session will introduce common reports for administrators and office staff from different modules including demographics, attendance, scheduling and grading. Schedule reports to run automatically. Use the browse screens as reports and sharing filters.

Session 4

Panel Discussion – Veteran Skyward Users – Been with Skyward for a while? Have that nagging question about a procedure that you just can’t get the hang of or need a report that you are sure everyone uses but you just can’t find? Or do you have some amazing tips and trick you would like to share with everyone? This session will be a roundtable discussion geared toward users helping users and giving suggestions on how you do things, or to find out how someone else might do a task.

Online Enrollment – Students Returning - This session will cover the concept, set up and processing of the On-Line Registration process for students returning to your school. We will step through all options available.

Future Scheduling – Start to Finish – Overview of the Future Scheduling process that will take you from cloning to get the process started to the finish product.

Food Service Best Practices Q & A - In this session, we will point out tips & tricks that can be useful in day-to-day operations.

Session 5

Grading Procedures and Discrepancies - This session will cover tips and tricks to resolve GPA-related issues using reports like GPA improvements or regressions and Grade Analysis to name a couple.

NSOE – New Student Online Enrollment - This session will provide an overview of the New Student Online Enrollment (NSOE) portal, and how to utilize the portal to allow parents to enroll new students into the district.

Skyward Game Show – Test your knowledge of Skyward – join a team – answer questions to compete for prizes! Fun break that will still have you learning new things!

SMS – Newer Student Features - With the crazy start and end to this school year, you may have missed, or just didn't have time to explore some of the latest and greatest options. This session will be a demonstration of some of the newest options available within Student Records.

Session 6

Health Records – For nurses or office personnel that assist the nurses in entering medications, reporting, setting up inventory for meds and entering office visits to have a record of all visits.

Top Ten Reports for Administrators - This session will introduce common reports for administrators and office staff from different modules including demographics, attendance, scheduling and grading. Schedule reports to run automatically. Use the browse screens as reports and sharing filters

Student Data Mining – Beginning - - This session will include an overview of Data Mining and give tips and trick to make Data Mining work for you giving you tips and tricks for options that will make your work faster and easier

Food Service – Free and Reduced/Direct Cert - The Direct Certification Import process is run by Food Service staff to import a file that is created by the state to identify students are Free based on Direct Certification. This

process can be run multiple times a year to ensure that all Directly Certified students are in the software with the correct Economic Status. This session will cover the process of importing the Direct Certification file. We will also cover the food service application entry that results in Free, Reduced, and Paid benefits. Finally, we will discuss how to manually add Direct Cert applications when students are not included on the state's Direct Cert file.

Session 7

Legal Names/Preferred Names/Gender Identity – Be informed on how to efficiently change preferred names while maintaining legal names for reporting purposes. See all the area's in the software that you can show/print preferred names including transcripts/report cards/teachers gradebooks.

Student Management Year End/School Level - This session will discuss things to do to prepare for the year end process, checklists and fixes after the year end process and what to expect during the actual running of the Year End Wizard

Guidance Counselor Bootcamp - discover how to track/read/analyze graduation requirements – how to use Educational Milestones for graduation – check out Career Plans and see what a great help this is in planning your student's futures.

Attendance Letter Set Up/Maintenance/Utilities - This session will cover how to setup and generate letters notifying parents/guardians of poor student attendance.

Session 8

Secondary Gradebook Overview - This session will be a general overview of the Skyward Gradebook Secondary program showing you the basic setup, as well as procedures to setting up assignments and posting grades.

Student Management Year Start/School Level - after you have completed your year-end process you will want to make sure you are all ready to begin the new year and have everything set up and working correctly for all involved. We have a checklist of items for you to consider

Key Attendance Reports – Entity and District Level - This session will cover the top ways to report and access the data after it has been entered.

Session 9

New Users Roundtable – You have gotten a lot of information at this convention – confused? Questions? Need clarification – come to this session to get your questions/concerns answered.

Data Mining Advanced - During this session you will learn how to create Data Mining Reports using more advanced tools, such as Processing Lists, Ranges, Sorts, Formatting, Sharing Templates, Creating Letters and Mail Merge etc.

GPA Calculation/Honor Roll/Class Rank/Transcripts - This session will go over how the GPA calculation setup is used in determining the results of Honor Rolls, Class Rank, Transcripts and Transcript Labels. You will see suggestions for the set up to Create Honor Rolls, Options for Class Rank and an overview of setting up Transcripts

Custom Forms Making Them Work for You - This session will cover creating custom forms in Student Management. Explore single forms vs Multiple forms per student, setting up data types, field type choices, Skyward fields, custom fields

Session 10

Advanced Features - Have you ever wondered how the options under the Advanced Features tab can help make your life easier? If so, this session is the one for you. Automated emails – student Indicators – demographic distribution to name a few.

Administrative Boot Camp - Explore basic navigation and discover all the different areas of the system you can use to assist in your day to day needs for staying in contact with staff, students and families, Message Center, Skylert, Automated emails to name a few options. Find reports and modules that will help you keep track of everything that is going on in your Entity/District

Custom Report Cards – Secondary - This session will cover the steps needed to create Secondary Report Cards. Make your report cards fit your needs.

Test Score Set Up and Import - Learn how to configure your District to utilize test scores - Building a test, importing information, Test Score Analysis and Reporting

State Reporting

Session 1

Finance – Fiscal and State Reporting Year End Processing

Session 2

ADM Troubleshooting - Common Issues and Solutions: In this session we will go over some of the most common issues with ADM and how to fix them.

Session 3

Grading Set Up and State Reporting - In this session we will go over the setup for grade calculations, importing test scores, and Quality Points.

Session 4

Payroll/HR – State Reporting - Learn about processing and reporting to the state for the Payroll and HR functions, including TCRS, TN Compass and 401K/457 processing.

Student Records – Special Programs Tabs - In this session we will go over the tabs available in Student Profile > Special Programs and how they relate to TN State Reporting.

Session 5

HR/Finance – W2's & 1099's - A refresher course on how to process your W-2s, and tips for correcting exceptions that are reported. Will also be similarly demonstrating 1099 processing.

Student State Reporting Year End & Year Start - This session will give an overview of the steps that need to be completed during year end and year start.

Session 6

State Reporting Updates, Best Practices - Overview of changes for the 2023-24 school year and some suggestions for best practices.

Session 7

The Ins & Outs of Extracts - This session will cover TN State Reporting Extracts: the journey from Skyward to Extracts to EIS. Troubleshooting missing data by using the extract report with tips on the correlation between specific records. We will cover where to look in the EIS system to verify your data has been loaded. Skyward support will discuss the extract codependency.

Session 8

HR – TCRS - We will have a representative from TCRS discuss and take your questions on the processing of this retirement.

State Reporting Transportation - This session will go over the required data that needs to be entered in order to properly submit transportation reports to the state.

Session 9

Student Schedules and State Reporting - This session will go over the fields used for state reporting when setting up courses, sections, and meets. We will also cover student schedules and making schedule changes.

Session 10

EIS Processing - This session will cover the process for sending data to EIS. We will cover the different ways data gets sent, how to view what has already been sent, and the EIS Transmission Report.

Finance State Reporting - Learn how to process financial state reports. Reports included are the Annual Budget Report, Budget Amendment Report, and the Annual Financial Report

FINANCE/PAYROLL/HR

Session 1

Next Level Purchasing - Learn about all of the tools available to enhance your purchasing capabilities including Ecommerce, Emailing of PO's, Receiving Online and more!

HR – Year End Processing - We will review the HR related processes that must be accomplished in Payroll, Employee Mgmt, Subtracking, Time Off, and Insurance Tracking during the transition of the school years.

Migration Center SMS to Qmlativ – What's in Store

Session 2

Zooming In – Top Reports for Business Teams – See how to run 10 of the most requested reports for School Business departments.

Beginners Employee Data Mining - - Skyward's Employee Data Miner can deliver helpful insights about your personnel. Learn the basics here.

HR Year End Processing 2 - We will review the HR related processes that must be accomplished in Payroll, Employee Mgmt, Subtracking, Time Off, and Insurance Tracking during the transition of the school years.

Session 3

SMS Newer Business Features - Time to explore some of the latest and greatest options. This session will be a demonstration of some of the newest options available.

Employee Mid-Year Changes – Assignment/Payroll - We'll discuss best practices for processing new employees through the HR/Payroll system as well as communicating salary changes in preparation for payroll.

Task Manager for HR/Payroll Tasks - Learn the basics for setup of Task Manager and how to use this to automate the individual tasks that must be done to complete needed processes like adding a new employee into the system.

Fiscal Year End- How smooth was your last year-end rollover? Attend this session and learn how to close out the year quickly, accurately, and with fewer headaches.

Session 4

AP Advanced Options - Learn how to set up and use Advanced options like Vendor ACH payments and create time-saving workflows in expense reimbursements.

Advanced Employee Data Mining - Learn more about how to better use the Employee Data Miner to pull data in creative ways in a variety of formats.

Session 5

Beginner – Budgetary Data Mining - This session will review the basics of constructing reports for Revenue/Expense reporting and Balance Sheets. We'll discuss the purpose of the various fields in each setup screen.

Newer Users and Refresher – FIN/HR - This session is for anyone who is new to Skyward or just feels like they need a refresher. Get a concise overview of the core functions performed in the Financial portion of the Business suite.

Session 6

True Time Rule Group Options - Have you had True Time setup for a while now but are wondering if there are other options that you could be using or in a better way. This session will explore how the options work to track time entered for various scenarios.

Budgeting Options - See popular web budgeting options, including budget requisitions, mass change options, budget entry options, and online budget transfer requests.

Employee Contract Letters and Posting to Online Forms - This feature allows the user to produce letters or documents with employee-related information embedded in the documents without needing a mail merge! You can save templates for re-use and you can include fields created in Custom Forms.

Session 7

HR Custom Forms - This session will cover creating custom forms in HR. Explore single forms vs Multiple forms per student, setting up data types, field type choices, Skyward fields, custom fields.

Advanced Budgetary Data Mining - This session will provide advanced instruction for creating custom finance data mining reports. Maximize your data mining reports by learning how to utilize features you may not have known existed in the reporting setup.

Salary Negotiations and Budgeting - They say 80% of a district's budget goes toward salaries and benefits. Join this session to learn how to prepare your budget by using Salary Negotiations. Explore setting up budgets for non-salary accounts, and learn how to import, mass change and set budget limits

Session 8

Subtracking/Time Off Importing - Discuss how Time Off, Sub Tracking and HR modules in the Skyward software have an interactive relationship. Learn how the various modules interact with their counterparts and determine a workflow to prevent duplication of entry.

Credit Card Processing - This session will demonstrate the credit card process in Skyward. Users will learn how to set up Credit Card Processing and use the check in/out feature, import transactions, and build invoices.

Session 9

Payroll Reporting Possibilities - This session will cover various payroll reports and the options included in running these reports.

Qmlativ Overview – Business - This session will cover some tips and tricks that allow efficient navigation in the Qmlativ Business Product.

A/P Processing and Reporting A-Z - We'll cover all of the reporting related to the Accounts Payable process including Vendor Check History and Vendor Data Mining.

Session 10

HR/Payroll Tips & Tricks - This session demonstrates how to get the most information out of employee profile. It will run through employee profile versus employee browse, screen configurations, views, and filters. This will make finding information in employee profile easy.

True Time Troubleshooting - Find out how to address issues that occur when processing True Time. Review options that are available when the process does not follow the normal flow for the payroll cycle.

Finance State Reporting - Learn how to process financial state reports. Reports included are the Annual Budget Report, Budget Amendment Report, and the Annual Financial Report